

CleverCat by On-site Custom Software

Thank you for evaluating or purchasing this software. If you are only evaluating CleverCat, the Free Trial you downloaded is fully-functional and all the data you enter during the evaluation period will still be there should you later decide to purchase and activate the software. There is no Save button in CleverCat. As you edit data or make design changes, your data is automatically saved at each step.

This document is not the complete User Manual but if you follow along with the steps described here, you should be able to create your first catalog in less than one hour. The complete User Manual can be viewed as a PDF by selecting **User Manual** from the Help Menu on the Menu Bar at the top of any form.

Introduction

Skip directly to Page 3 to get started but continue reading here for a brief description of databases and catalog software in general.

Catalog software products can be grouped into two categories; Page Layout and Database-driven.

Page Layout software gives the user full control over every element on the page. Individual graphics, text, borders, fonts and colors can all be placed and adjusted independently. Page Layout software is the better choice when the emphasis is on creating artistic or stylistic pages.

Database-driven products are the better choice when the emphasis is on ease-of-use or when there are a large number of products to be displayed or frequent changes are required to the product line. At the simplest end of this range, a database-driven software should be able to import a spreadsheet and print a catalog in only a few minutes.

Each software has its own advantages and disadvantages. The most obvious advantage of a Database-driven software is its ability to quickly insert a new product into the middle of a category. The user should be able to simply enter the data and re-print the category. To do the same using the Page Layout approach might require re-sizing other elements on the page to accommodate the new product or even moving products from one page to the next. In extreme cases, this could require cascading changes through the entire catalog.

The biggest advantage of Page Layout software is its flexibility. At the upper-end of this range, you should be able to create, on paper, almost anything you can imagine. This is also its biggest disadvantage. Creating a large catalog can take many hours, days or even months.

In contrast, Database-driven softwares are typically very rigid. The printed output is very uniform in appearance and, at the lower-end of this range, there are very few presentation options to choose from: Every user's catalog looks just like every other user's catalog. However, using a Database-driven software, a user might be able to create a catalog in only a few minutes.

CleverCat is a hybrid of Page Layout and Database-driven softwares. With CleverCat you create, just once, a printing template for your products. Using this template, a full catalog can be quickly created using the products recorded in the database.

CleverCat has the ability to create an artistic layout, within a modest range of options, as well as the ability to quickly produce a large catalog of hundreds or thousands of items.

We hope that this short manual will help you decide if CleverCat is the best software for your individual needs. If you have any difficulties or require more information, please contact: **support@clevercatalogs.com**

Flat vs. Relational Databases

You may have only ever viewed the products that you sell in a “flat” format. The most common example of this is a spreadsheet pricelist with a long list of SKUs or Part Numbers and their prices, one item per row. While CleverCat is useful for this type of data, its true strength is in its ability to represent products in a relational format.

As shown in the illustrations below, flat databases comprise one image for every item. Similar items may be represented by the same picture and similar descriptions. Depending on the products, this can be a very inefficient way to display your data.

Flat Database

Item	Description	Price
CD-ROM	16x	\$14.00

Item	Description	Price
CD-ROM	24x	\$16.00

Item	Description	Price
CD-ROM	32x	\$18.00

Item	Description	Price
CD-ROM	48x	\$22.00



Relational databases comprise one image, plus an unlimited number of associated sub-items, for every item.

Relational Database

Item	Description	Price
CD-ROM	16x	\$14.00
	24x	\$16.00
	32x	\$18.00
	48x	\$22.00



In this example, the two structures present the same data but the relational database presents it in a more efficient manner. This is true when many items can be represented by a single image. For some items, such as vehicles, a relational database does not work at all and items can only be represented properly with a flat structure.

Your catalog may even be a mix of flat and relational data. CleverCat’s Dynamic Print Templates are ideally suited for this type of variable data and this tutorial will demonstrate how a “flat” source document, such as an Excel spreadsheet, can be imported to create a relational database.

A sample spreadsheet of home and office electronics is included with the software but for this example, we'll use the following much simpler data set.

	A	B	C	D	E	F	G	H	I	J
1	Row	Category	Product	SKU	Size	Color	Cost	Price	Photo	Long Description
2	1	T-Shirts	Beefy-T T-Shirt - Short Sleeves	516971	Small	White	8.40	15.99	Beefy.jpg	Ultra-soft cotton - feels g
3	2	T-Shirts	Beefy-T T-Shirt - Short Sleeves	516972	Medium	White	8.40	15.99	Beefy.jpg	Ultra-soft cotton - feels g
4	3	T-Shirts	Beefy-T T-Shirt - Short Sleeves	516973	Large	White	8.40	15.99	Beefy.jpg	Ultra-soft cotton - feels g
5	4	T-Shirts	Tagless T-Shirt - Short Sleeves	514221	Small	White	7.90	14.99	Tagless.jpg	Preshrunk for a great fit.
6	5	T-Shirts	Tagless T-Shirt - Short Sleeves	514222	Medium	White	7.90	14.99	Tagless.jpg	Preshrunk for a great fit.
7	6	T-Shirts	Tagless T-Shirt - Short Sleeves	514223	Large	White	7.90	14.99	Tagless.jpg	Preshrunk for a great fit.
8	7	T-Shirts	Ultimate Cotton Pocket T-Shirt	507501	Small	White	8.90	16.99	Ultimate1.jpg	Left chest pocket. Presh
9	8	T-Shirts	Ultimate Cotton Pocket T-Shirt	507502	Medium	White	8.90	16.99	Ultimate1.jpg	Left chest pocket. Presh
10	9	T-Shirts	Ultimate Cotton Pocket T-Shirt	507502	Large	White	8.90	16.99	Ultimate1.jpg	Left chest pocket. Presh
11	10	T-Shirts	Ultimate Cotton - Long Sleev	540111	Small	White	9.20	17.99	Ultimate2.jpg	Preshrunk cotton for the
12	11	T-Shirts	Ultimate Cotton - Long Sleev	540112	Medium	White	9.20	17.99	Ultimate2.jpg	Preshrunk cotton for the
13	12	T-Shirts	Ultimate Cotton - Long Sleev	540113	Large	White	9.20	17.99	Ultimate2.jpg	Preshrunk cotton for the

* **Category**

SubCategory

* **Inventory Group** see tutorial

Photo 1

Photo 2

Print Order

Sort Order

Page Number

Page Postion

Inventory Index

Category Label

“Data Mapping” refers to selecting columns from the spreadsheet and “mapping” them to fields in the database.

You must make a selection for the Category field for the “Map”. Click the drop-down box next to the label “Category” to display a list of the columns in your spreadsheet. In our sample data set there is a column labelled “Category”. The value in this column, T-Shirts, groups together all the rows in our sample data. As shown above, every row in the spreadsheet must have a category name.

There is no limit to the number of categories that you may have in your catalog.

The next selection that must be made is the “Inventory Group”. Referring back to the Introduction, we compared “Flat” and “Relational” data. You could leave the Inventory Group field selection blank and this spreadsheet will be imported as a flat database of 12 different products. However, we can see that the data above can also be viewed as 4 different products, each available in 3 different sizes.

There may be several columns in your own spreadsheet with data which groups together related items. Related items typically share a common photo and you can see this in our sample data set. Either the Product column or the Photo column would be an appropriate selection for our Inventory Group field.

The other field selections are covered in detail later in the full manual but, for a simple data set, those two fields are all that are required. Because we want photos in our catalog, we'll also select the column that contains the photo filename. The last field filled in above is the Category Label field. Normally this will be the same as the Category field and you will notice that it is automatically filled in when the Category field is selected.

Product

SKU

Size

Color

Cost

Price

Custom

Custom

Custom

Custom

Custom

Custom

Custom

The remaining selections on this form are the data fields. It does not matter in what order you select these fields**. Later, you will select which fields you want to print using the Template Editor. Most users will find it easiest to just select all of the columns in their spreadsheet.

In this screenshot, the field labels, on the left, match the selected column names on the right. This is because the field labels can be changed to make it easier to identify them for future imports. Click any field label and change it to something that suits your data.

** NOTE: The field selection order does not matter unless you are creating HTML pages with a PayPal cart. The first selection, in this case – Product, will be submitted to the Paypal cart as the item description.

There are 20 data fields into which you can import your spreadsheet columns. There is an additional field labelled “Notes” at the bottom of the third column of selection boxes. Each of the first 20 data fields can hold a maximum of 255 characters. The Notes field is a special field which can hold an unlimited amount of text. In our sample data we have a column labelled “Long Description” and some of these descriptions exceed 255 characters. If your spreadsheet has a similar column, you will need to select it as the Notes field.

The AutoSort Function

Append Option

All Records

Unique Records Only

Auto Sort

Below the Selection boxes is the Append Option selection. When importing a spreadsheet for the first time, the proper option is “All Records”. “Unique Records” allows you to add new records to the original spreadsheet and re-import it without creating duplicate records. This is covered in the full manual.

The AutoSort options works together with the Inventory Group selection. If AutoSort is checked when you import the data, a Printing and Sorting Order number is automatically created.

	Print / SubOrder	Page / Position	Inventory Group	Product	SKU	Size	Color	Cost	
<input checked="" type="checkbox"/>	1	1	1	1	Beefy-T T-Shirt - Beefy-T T-Shirt	516971	Small	White	8.4
<input checked="" type="checkbox"/>	1	2	-	-	Beefy-T T-Shirt - Beefy-T T-Shirt	516972	Medium	White	8.4
<input checked="" type="checkbox"/>	1	3	-	-	Beefy-T T-Shirt - Beefy-T T-Shirt	516973	Large	White	8.4
<input checked="" type="checkbox"/>	2	1	2	1	Tagless T-Shirt - Tagless T-Shirt	514221	Small	White	7.9
<input checked="" type="checkbox"/>	2	2	-	-	Tagless T-Shirt - Tagless T-Shirt	514222	Medium	White	7.9
<input checked="" type="checkbox"/>	2	3	-	-	Tagless T-Shirt - Tagless T-Shirt	514223	Large	White	7.9
<input checked="" type="checkbox"/>	3	1	3	1	Ultimate Cotton F - Ultimate Cotton	507501	Small	White	8.9
<input checked="" type="checkbox"/>	3	2	-	-	Ultimate Cotton F - Ultimate Cotton	507502	Medium	White	8.9
<input checked="" type="checkbox"/>	3	3	-	-	Ultimate Cotton F - Ultimate Cotton	507502	Large	White	8.9
<input checked="" type="checkbox"/>	4	1	4	1	Ultimate Cotton - Ultimate Cotton	540111	Small	White	9.2
<input checked="" type="checkbox"/>	4	2	-	-	Ultimate Cotton - Ultimate Cotton	540112	Medium	White	9.2
<input checked="" type="checkbox"/>	4	3	-	-	Ultimate Cotton - Ultimate Cotton	540113	Large	White	9.2

The screenshot above is from the Data View form and shows the results of the import using AutoSort. A Print Order numbering from 1 to 4 has been created and assigned to each of the 4 groups of products. A Sub Order number of 1 to 3 has been created and assigned within each of these groups.

The AutoSort function can be applied at any time after importing. There is an AutoSort button on the data-related forms in CleverCat.

Depending on your data, it may not be possible to use the AutoSort function. If your data has logical groupings but there are no descriptions or other data that are common between the groups, it may be necessary to manually create Print and Sub Order numbers in the spreadsheet itself. You will notice that there are Print Order and Sort Order field selections on the Data Mapping form for this purpose.

If you intend to create your own Print and Sub Order numbers, you should leave the Inventory Group field selection blank.

After all the field selections have been made, click the Append button. The Update button allows you to make changes to the original spreadsheet and re-import it to update the database.

Don't worry about making mistakes in importing. There is an easy method for deleting large groups of records and retrying the import with different selections.

NOTE: All cells in a spreadsheet must be formatted as Text before the spreadsheet can be imported. In most cases, no changes are required to your spreadsheet as this is the default setting. If you get an error during an import indicating that formatting is required, click the “Tutorial” button on the File Selection form for more instructions on formatting cells in Excel.

Entering Data Manually

If you have imported your spreadsheet and do not need to edit the data, you can skip ahead to page 9: Category Editor. If you need to enter or edit your data manually, there are two different forms you can use to do this. Click either the Data View or Inventory button on the Main Menu.

The Data View Form

The Data View form is probably the easiest form to use for manually entering or editing large amounts of data. This form is divided into two sections; the Category Window and the Data Window. Click any row in the Category Window to view its records in the Data Window.

Categories	Category Label	Image Folder	Pages	Items	Template	
Cordless Phones	Cordless Phones	C:\Program Files\CleverCat\Photos\	2	9	Static Sample 1	▼
Phones	Phones	C:\Program Files\CleverCat\Photos\	3	16	Dynamic Sample 2	▼
Portable DVD	Portable DVD	C:\Program Files\CleverCat\Photos\	2	10	Dynamic Sample 1	▼
My New Category			-	-		▼
*			-	-		▼

To create a new category, scroll to the bottom of the list of categories in the Category Window. Simply type the name of your new category in the blank row at the bottom of the list and press the Enter key.

The Image Folder field is automatically filled in with the default folder. You can change this to match the location where you store your photos. The Image Folder value is combined with the Photo Name value to define the full path and name of the image file.

For example, if your photo is: C:\MyCatalog\MyPhotos\Photo1.jpg you can record this several ways. Normally you would record C:\MyCatalog\MyPhotos\ in the Image Folder field and Photo1.jpg as the filename but you could also record C:\MyCatalog\ in the Image Folder field and MyPhotos\Photo1.jpg as the filename.

Each category can have a separate Image Folder. This is useful if you have a very large number of items and need to organize your photos into more manageable numbers.

Active?	Print / Sub		Change a Column Name								
	order	order	Photo	Product	Code	Size	Color	Cost	Price	Notes	
<input checked="" type="checkbox"/>	1	1	Beefy.jpg	Beefy-T T-Shirt - Short Sleeves	516971	Small	Small	8.4	15.99	Ultra-soft cotton - feels great. Sl	
<input checked="" type="checkbox"/>	1	2	Beefy.jpg	Beefy-T T-Shirt - Short Sleeves	516972	Medium	Medium	8.4	15.99	Ultra-soft cotton - feels great. Sl	
<input checked="" type="checkbox"/>	1	3	Beefy.jpg	Beefy-T T-Shirt - Short Sleeves	516973	Large	Large	8.4	15.99	Ultra-soft cotton - feels great. Sl	
<input checked="" type="checkbox"/>	2	1	Tagless.jpg	Tagless T-Shirt - Short Sleeves	514221	Small	Small	7.9	14.99	Preshrunk for a great fit. Washe	
<input checked="" type="checkbox"/>	2	2	Tagless.jpg	Tagless T-Shirt - Short Sleeves	514222	Medium	Medium	7.9	14.99	Preshrunk for a great fit. Washe	

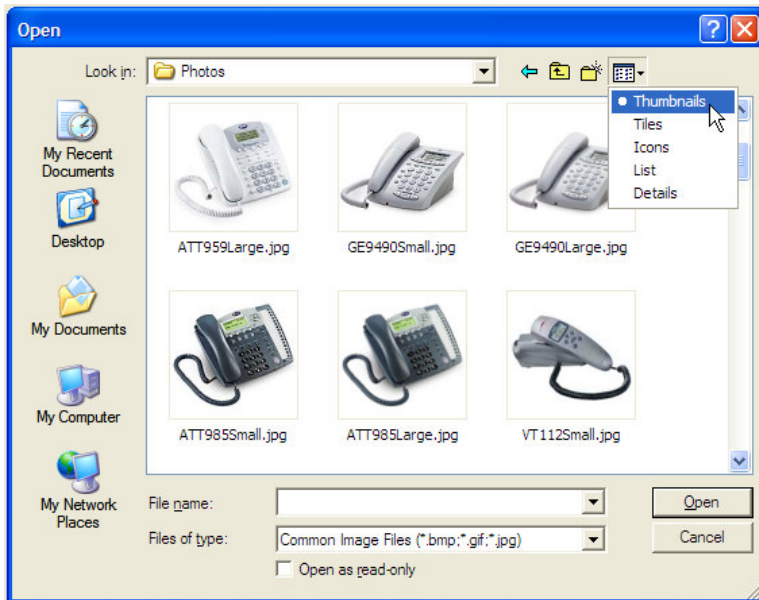
After creating your new category, you can use the Data Window to enter your records. The Data Window is similar to an Excel spreadsheet. You can re-size and even re-order the columns as you would in Excel. You can Copy-and-Paste data from a spreadsheet into the Data Window and use other Excel editing functions such as Ctrl+F (Find) and Ctrl+H (Replace).

The procedure for copying from Excel varies. If you only want to copy specific columns, the easiest method is to click the Column Header(s) in Excel and press Ctrl+C to copy to the clipboard. Then, in CleverCat, click the corresponding Column Header(s) and press Ctrl+V to paste the data. If you are working with a blank category, this will create a number of rows in the database equal to the number of rows in the spreadsheet.

In the screenshot above, there is an Active Column as well as Print and Sub Order Columns. These columns are non-movable so they must also exist as the first three columns in your spreadsheet. You don't have to enter data in these columns, you can simply create three blank columns if you want.

To copy an entire Excel Worksheet, do the following. In Excel, click the Sheet Selector (the box to the left of column "A" and above row "1") and press Ctrl+C to copy the entire sheet to the clipboard. In CleverCat's Data Window, click an empty row and Press Ctrl+V to paste the entire sheet. This will create a number of rows in the database equal to the number of selected rows in the spreadsheet.

In the upper-right corner of the Data View form is an image box which displays the product image of the currently selected row in the Data Window. Click this box to open a Browsing Dialog to search for a new file.



This screenshot is of the Browse Dialog in Windows XP. Your window may be different but there should be an option to view the files by Thumbnail. This will make it easier to select the correct photo.

Double-click the photo to select it.

In the Data Window, you can double-click the Photo or 2nd Photo text field in any data row to open the same Dialog.

To delete rows, click the Record Selector (the box with the black triangle in the screenshot on the previous page) for one or more rows or for one or more categories and then press the Delete key. The records will disappear temporarily but you will be asked to confirm this action to make it permanent.

Warning: There is no recovery from an accidental deletion. Make backups of your data frequently.

If you delete a category in the Category Window, all the records in the category as well as the category settings (templates, headers, etc) will also be deleted. If you are testing the import function or using Excel to edit or update and then replace your data, you should select and delete just the data by clicking the sheet selector in the upper-left corner of the Data Window. This way, when you re-import or re-paste the updated data, the category settings you made earlier will not be lost.

Customize the Data Window the same way you would an Excel spreadsheet. Change the widths of column and the height of rows by placing your cursor at the dividing line where it will change into a double-headed arrow. Re-order the columns by clicking the Column Header and then dragging the column to a new position.

The Print and Sub Order columns indicate the current printing order as well as the grouping of related records. If you have entered data in Inventory Group column, you can use the AutoSort button to automatically create these numbers. You can also change the printing order and regroup items by manually entering or changing the numbers in these columns.

Print Preview



After importing or entering your data, you can select a Printing Template in the Category Window and click the Print Preview button. At this stage however, your data will probably not print where you want it to in the template.

The sample templates were setup to match the sample data and your own data is probably very different. You can carry on with this tutorial and try out the Template Editor to see how to place your own data fields.

The Inventory Form

The Inventory form is divided into two sections as well. The top half of the form is a scaled-down version of the Data View form and there is a Category Window where you can select the category to view in the Data Window. As on the Data View form, add a new category by scrolling to the bottom of the Category Window and enter the name of your new category.

The screenshot shows the Inventory Form interface. At the top, there is a 'Category' dropdown menu with 'My New Category' selected. Below it are several 'Custom' labels and empty text boxes. To the right, there are more 'Custom' labels and empty text boxes. Further right, there is an 'Inventory Group' text box and a 'Print / SubOrder' section with two input boxes containing '1' and '3'. A checked 'Active Item' checkbox is also present. Below these fields is a 'Product Notes' text area. To the right of the notes are two photo sections: 'Photo 1' with a thumbnail of an orange t-shirt and a text box containing 'tagless.jpg', and 'Photo 2' with a thumbnail of a white t-shirt and a text box containing 'null.jpg'. At the bottom right, there is a 'Default Image Folder' text box containing 'C:\Program Files\CleverCat\Photc' and a 'Template' dropdown menu with 'Dynamic Sample 2' selected. At the bottom left, there are 'Ad Text' and 'SubCategory' text boxes.

The bottom half of this form, the Inventory Detail Window, allows you to view and edit an individual item in the database. Click any row in the Data Window to view that record in the Detail Window. Add records to your database as you would on the Data View form, using the Data Window, or click the Add a New Inventory Item button to create a new record to be edited in the Detail Window.

When you create a new category, the field labels will be set to the default value of "Custom". You should change these to match your data. These field labels will be used later on the Template Editor to identify the fields and they are also the Column Headers that will be printed if your catalog uses a Detail Table (covered later).

The only significant difference between this form and the Data View form is that you can see all the fields of an individual record without scrolling. However, because you can customize the Data View form by changing the height, width and order of cells, most users will find the Data View form easier to work with and will not use this form at all.

TIP: You can double-click almost any field or text box in CleverCat to view it in a larger editing window.

The Category Editor Form

After you have imported or manually entered your data, you should visit the Category Editor form. On the Main Menu, click the name of a category in the selection list to open the Category Editor for that category or, click the Category Editor button and then click the Find button to select a category. You can also open the Category Editor form by double-clicking the Category Name in the Category Window on either the Data View or Inventory form.

Unique Name	<input type="text" value="Cordless Phones"/>	Image Folder	<input type="text" value="C:\Program Files\CleverCat\Photos\"/>	Mark-up / Discount	<input type="text" value="0"/> %
Printed Name	<input type="text" value="Cordless Phones"/>	Category Banner	<input type="text"/>	Start Page Numbering at:	<input type="text" value="1"/>
Option Text	<input type="text"/>	Watermark	<input type="text" value="C:\Program Files\CleverCat\Photos\Tow"/>	Active Category	<input checked="" type="checkbox"/>
Page Prefix	<input type="text"/>	Category Footer	<input type="text"/>		
Template	<input type="text" value="Static Sample 1"/>				

HTML Options		Column Headers		Inventory Grouping Field
HTML Template	<input type="text" value="Dynamic Sample 1"/>	Column 1	<input type="text" value="Description"/>	Part No.
Linking Filename	<input type="text" value="Detail"/>	Column 2	<input type="text" value="Part No."/>	Column 11
HTML Template	<input type="text" value="Dynamic Sample 2"/>	Column 3	<input type="text" value="SKU"/>	Column 12
Max. Rows	<input type="text" value="3"/>	Column 4	<input type="text" value="Medium Desc."/>	Column 13
Max. Rows	<input type="text" value="1"/>	Column 5	<input type="text" value="Cost"/>	Column 14
Max. Rows	<input type="text" value="1"/>	Column 6	<input type="text" value="Price"/>	Column 15
Max. Rows	<input type="text" value="1"/>	Column 7	<input type="text" value="Long Desc."/>	Column 16
Max. Rows	<input type="text" value="1"/>	Column 8	<input type="text" value="Manufacturer"/>	Column 17
Max. Rows	<input type="text" value="1"/>	Column 9	<input type="text" value="3rd Photo"/>	Column 18
Max. Rows	<input type="text" value="1"/>	Column 10	<input type="text" value="Custom"/>	Column 19
Max. Rows	<input type="text" value="1"/>			Column 20

CleverCat can print a second set of HTML files which are linked to the first set through the primary photo. For example, your first template could contain just a photo (thumbnail) and brief description. When a user clicks the photo, a second HTML file containing more product detail could be displayed. The first set of HTML files are given the name of the category and the second set are given the name you specify here.

Maximum Rows is the numbers of rows of Display Units, not the number of Products.

From:

To: This Category All Categories

Buttons: Headers, All Settings

Use this form to select the Image Folder for the current category. Each category can have its own folder to make it easier to organize large numbers of photos and the folder name is combined with the photo filename to define the full path and name of the image file.

For example, if your photo is: C:\MyCatalog\MyPhotos\Photo1.jpg you can record this several ways. Normally you would record C:\MyCatalog\MyPhotos\ in the Image Folder field and Photo1.jpg as the filename but you could also record C:\MyCatalog\ in the Image Folder field and MyPhotos\Photo1.jpg as the filename.

If you have not changed the field labels (column headers) on the Inventory or Data View form, you can change them here. These labels will be used later on the Template Editor to identify fields and they are also the Column Headers that will be printed at the top of a Detail Table. Each category can have different labels or you can use the Copy buttons to change them for one category and apply those changes across all categories.

The last selection that must be made on this form is the Printing Template. Select a Template from the drop-down box and you are ready to print.



Most forms in CleverCat have a Print Preview button. This allows you to view the printed page on the screen without wasting paper.

If you are evaluating this software, the steps you have taken so far may be enough to help you decide if CleverCat is appropriate for your needs. If you want to explore it further, take a few more minutes to design a basic Printing Template.

Creating a Printing Template

To get started, click the Template Designer button on the Main Menu and then select an existing template or click the New button on the Templates Menu. If you create a new template, you will be prompted to provide a name. You can create as many templates as you need. Most users will find that they will need to create only one or two templates. In this case, the name really doesn't matter. Depending on your data, you may find that you need to create a separate template for each category. In this case you may find it easier to name each template for the category it will print.

Click the Page Setup button to open the designer for the currently selected template.

The screenshot shows the Template Designer interface. On the left is a settings panel with the following sections:

- Page Dimensions:** Paper Size: Letter
- Margins:** Top: 0.35, Bottom: 0.35, Left: 0.35, Right: 0.35. (Inside/Outside)
- Header/Footer:** Header? [checked], Footer? [checked]. Header Option: 5, Footer Option: 2. Text: Company Banner and Category Text / Footer, Optional Text and Page No.
- Header/Footer Spacers:** Header Spacer: 0.04, Footer Spacer: 0.02. Color: [Blue]
- Data Option:** 1 (Static - Grid Pattern). Display Columns: 2, Rows: 2, Fields Grow and Shrink: 1.
- Active Cell:** [Empty]
- Font / Shading:** Font: [Default], [B], [I], [U]. Color / Shading: [White]
- Duplex Data:** [unchecked], Alternating Data: [unchecked]
- Page Num. Width:** 0.40
- Corner Radius / Line Thickness:** 40 / 20. Height Adjust: 0
- Display Unit Borders:** [Icons for border styles]. Working Category: [Dropdown]

On the right is a preview window titled "Category" showing a 2x2 grid of blue-shaded display units. The top-left unit is labeled "Optional Text" and the bottom-right unit is labeled "Footer". A page number "1" is visible in the bottom right corner of the preview.

You can experiment with the settings on this form now if you want but most of the options will be explained in detail later. If you are working with an existing template, just click the Display Unit button now. For the purposes of this one-hour tutorial, if you want to design your own template, make the following selections.

For "Data Option", select 1. This will select a "Grid" template. Grid templates are easier to design because we know exactly how many items will fit on a page. Dynamic templates are better suited for data which varies greatly between items or to reduce the number of pages required for the catalog.

For Display Columns and Display Rows, select 2. An individual item, its description fields, photo and related sub-items are collectively referred to as a Display Unit. In the screenshot above, you can see there are 4 Display Units. For Layout, select "Across then Down". When designing a Dynamic Template, "Down then Across" is usually the better option as this compacts data more efficiently.

Finally, select a "Working Category" from the drop-down box at the bottom of the form. When you look at a Print Preview on any of the Template Design forms, this will be the category that will be printed and it is the Column Headers from this category that will be displayed in the next step. Double-click any of the Display Units on the sample page or click the Display Unit button to continue.

Designing a Display Unit

The Display Unit form is where you select and place the fields you want to print. In the lower-left corner of the form is the “Stack” of available fields, organized into two columns of labels and fields. You can place labels as well as fields on the Design Pad. Each label / field pair is identified by the Column Header Name you gave them on the Category Editor or Inventory form.

If you are working with an existing template and want to see how the data you just entered will print, follow the instructions below but delete the existing fields on the Design Pad and replace them with the fields which you want to see printed in that position.

The screenshot shows the 'Display Unit Format' form with the following configuration:

- Width (in.):** 3.90
- Height (in.):** 4.57
- Vertical Margin:** 0.05
- Horizontal Margin:** 0.05
- Grid:** 1 (1 to 10)
- Active Cell:** Photo1
- Left:** 0.00 %
- Top:** 8.00 %
- Width:** 54.00 %
- Height:** 56.00 %
- Photo Dimensions (in.):** Width: 2.05, Height: 2.50

The design pad on the right shows a preview of the layout with a 'Photo1' area, 'SKU' and 'Notes' fields, and a 'Detail Table' at the bottom.

The 'Stack' at the bottom left contains the following fields:

Product	Custom	Custom
	Custom	Custom
Size	Custom	Custom
Color	Custom	Custom
Price	Custom	Custom
Cost	Custom	Custom

Simply “drag-and-drop” fields or labels from the stack and place them on the Design Pad. Change the width or height of a field by moving your mouse cursor to the edge of the field and “dragging” the border to the desired size. Optionally, you can enter the field dimensions manually. This is useful if you are trying to align fields exactly. When you click a field on the Design Pad, its name appears in the “Active Cell” box. You can now enter its relative dimensions and position in the value boxes.

Positions and dimensions are recorded in percentages relative to the dimensions of the Display Unit. Referring back to the Page Setup form which showed four Display Units, you can see that the Design Pad on this form is the same shape as one of the four on the Sample Page. In the screenshot above, you can see that Photo1 is the Active Cell and that its Left position is 0, the left edge of the Display Unit, its top edge starts at a point 8% down the height of the Display Unit and its Width and Height are 54% and 56% of the width and height of the Display Unit.

If you decide that you do not want one of the fields that you have placed, click it again to make it the “Active Cell” and click the Return to Stack button.

Font sizes displayed on this form do not exactly represent how they will be displayed on the actual printed page. Use the Print Preview button to see how your changes will print.

NOTE: Previewing pages can consume a lot of memory, especially if there are many photos on a page or the file size of the photo is very large. For this reason, from the design pages, you can only preview the first page of items. As well, if you change the number of Display Units a template has, you may not see a full page of items in the Design Form previews. To view all your data, do a Print Preview from any of the data-related forms.

TIP: If you are designing a Dynamic Template, start by turning on the Display Unit Borders using the button on the Page Setup form. Next, drag a single field onto the design pad and click the Print Preview button to see the size of the Display Unit. Move the single field up or down on the Design Pad to adjust the minimum height of the Display Unit. A Dynamic Template can grow to accommodate more text and its minimum height is set by the position of the lowest element on the Design Pad.

The Detail Table Form

Depending on your data, you may not need to use this form. In our sample data, each T-Shirt is available in different sizes and we want to create a table displaying all these sizes. Be sure to drag the “Detail Table” field onto your Design Pad. Double-click the Detail Table field or click the Detail Table button to continue.

The Detail Table design form is very similar to the Display Unit form. There is the same “stack” of fields and labels to choose from. You drag-and-drop fields onto the Detail Table Design Pad and you can re-size them by dragging the borders or entering percentage values directly.

The differences are that you can only drag fields onto the Detail Table. The field labels are automatically added above the fields as Column Headers. Also, you can only change the widths of fields. The field heights are automatically set to the height of the row.

Tagless T-Shirt - Short Sleeves



SKU
514221

Preshrunk for a great fit. Washed for a gently faded look. Tag-free reinforced crewneck. 100% cotton

Product	SKU	Size	Price
Tagless T-Shirt - Short Sleeves	514221	Small	\$ 7.90
Tagless T-Shirt - Short Sleeves	514222	Medium	\$ 7.90
Tagless T-Shirt - Short Sleeves	514223	Large	\$ 7.90

The selection for the option, “First Line in Detail Table repeats from Display Unit”, will depend on the structure of your data.

In our sample data, each row contained all the text necessary to fully describe the item. This means that much of the text was common to every row. In designing the Template, the normal practice would be to place all the common text in the Display Unit and only the individual text, such as part numbers, sizes, etc. in the Detail Table. In the screenshot above and the Print Preview to the left, we’ve used the Product field and the SKU field in both the Display Unit and the Detail Table to clarify how the “First Line Repeats” option works.

Your own data may be structured similar to our sample data, where you need each row to be printed in the Detail Table, or (as shown below) you may have one row at the top of each group of rows that contains all the common text.

If you select the option “Detail Table has Column Headers”, your Detail Table will be printed as shown in the Print Preview above with the Column Headers you entered on the Category Editor of Inventory Form.

Order	Category	Product	SKU	Size
1	T-Shirts	Beefy-T T-Shirt	516971	Small
2	T-Shirts	Beefy-T T-Shirt	516972	Medium
3	T-Shirts	Beefy-T T-Shirt	516973	Large
Order	Category	Product	SKU	Chest
1	T-Shirts	Tagless T-Shirt	514221	32"
2	T-Shirts	Tagless T-Shirt	514222	34"
3	T-Shirts	Tagless T-Shirt	514223	36"

If your data is structured as shown to the left, where the required Column Headers are different for each group of related items, you would not select either the “Column Header” or the “First Line Repeats” options. In this case, you could create Column Headers by selecting the “Header” fields and placing them on the Display Unit Design Pad instead. By making them the same width, and lining them up with the fields in the Detail Table, you could achieve the same results as the automatic Column Headers on the Detail but allow the text to vary between items.

Formatting Text

Both the Display Unit and Detail Table forms have a Formatting button. Click this to go the last form where you can change the formatting of text and borders.

Product	SKU	Size	Price
Product	SKU	Size	Price
Notes			

Click any field placed on the Design Pad to make it the Active Cell, and then click any button for the attribute that you want to adjust. The best way to use this form is trial-and-error. Change a value then click the Print Preview button to see how it looks.

There are no “Save” buttons in CleverCat. Your data and formatting changes are automatically saved as you make them. If you have created a template that you like but want to experiment with further changes, click the Copy button on the Template Menu make a copy of the template first. That way, you can always go back to the template that you liked.

Printing

That’s it! If you’ve followed along with this tutorial, you should have been able to create a fairly basic catalog. Most of the other features of CleverCat can be easily learned through the trial-and-error or experimenting approach although they are described in detail in the full User Manual.

Return to any of the data-related forms; Category Editor, Inventory, etc, to Print Preview an entire category. For full control of printing options, click the Printing button on the Main Menu to access the Printing Menu.

Category	Items	Pages	T.O.C.	Print?
T-Shirts	12	2	1	<input checked="" type="checkbox"/>
Phones	16	3	2	<input type="checkbox"/>
Portable DVD	10	2	3	<input type="checkbox"/>
Cordless Phones	9	2	4	<input checked="" type="checkbox"/>
My New Category	3	1	5	<input type="checkbox"/>

On the Printing Menu, you can select individual or multiple categories to preview or print. The Printing Menu is the only form where you can send a print job directly to the printer instead of the screen. However, if you are looking at a Preview from any other form, you can send the job to the printer by selecting Print from the File Menu on the Menu Bar at the top of the form.

We hope this brief introduction has answered any questions you may have about CleverCat. For more information, every form in CleverCat has an “Online Tutorial” button at the top-right corner. Each tutorial runs about five minutes and contains instructions specific to that form.

Thank you for taking the time to read this manual. ~ On-site Custom Software.