

CleverCat by On-site Custom Software

Thank you for purchasing or evaluating 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.

Table of Contents

Introduction	2	Designing a Printing Template	16
Getting Started	4	Page Setup	17
Importing Data	5	Display Units	17
Data Mapping	5	Designing a Grid or Feature Template	20
Inventory Grouping	6	Designing a Dynamic Template	21
AutoSorting	7	Designing the Detail Table	24
Data View Form	9	Formatting Text – Fonts and Colors	26
Inventory Form	11	Text, Numbers and Currency	26
Ad Text	12	Printing	27
SubCategory Text	12	Table of Contents	27
Category Editor Form	13	Index Page	27
Creating a New Category	13	Rebuilding the Page Index	28
Default Image Folder	13	Duplex Printing	28
Category Banner	13	Configuration Form	29
Watermark	14	HTML Files for Internet or CD-ROM	29
Price Markup / Discount	14	HTML Tags	31
Starting Page Number	14	Troubleshooting and Support	32
Active Category	14		
Optional Text	14		
Selecting a Print Template	14		
Detail Table Headers	14		
Copying Category Settings	14		
Inventory Grouping Field	15		

Introduction

Before getting started, a brief description of databases and catalog software is useful.

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, 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 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 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.

If you 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.

Getting Started

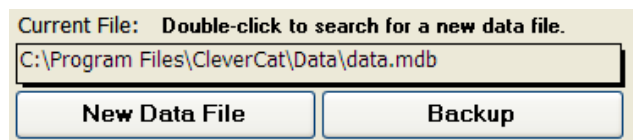
Many of our users have created their first catalog in less than one hour. When you start CleverCat, the first form you see is the Main Menu and there is a button there labelled “Quick Start Guide”. Click this button to open an online PDF document with a short tutorial designed to walk you through the basics of importing or entering data and creating a simple printing template. This manual will cover all of the features of CleverCat in greater detail but the Quick Start Guide is the best place to start if this is your first time using the software.

The Quick Start Guide is organized to follow the steps you would take in creating a catalog. This manual is intended as a detailed reference and is organized by form or subject.

At the top-right corner of every form in CleverCat is a button labelled “Watch the On-line Tutorial”. These tutorials contain information and examples specific to the current form. If you have any questions, these tutorials are a good place to start.

In a spreadsheet, you are probably familiar with the terms Column, Row and Cell. In database terminology, a field is the equivalent of a cell and a Record is the equivalent of a Row. Column is common to both spreadsheets and databases but, because it is sometimes necessary to indicate which field a column comes from, Column and Field are often used interchangeably throughout this manual.

Saving your Data



As you work with CleverCat, all your changes are automatically saved as you make them. There is no Save button in CleverCat.

When you first install CleverCat, the default Data File is “data.mdb”. You can work with this file or create a new, blank file by clicking the New Data File button. If you are going to make a large number of changes to a current data file, such as import new records or delete categories, you should make a copy of your data first using the Backup button. “Backup” copies your current Data File to a new file which you are asked to name. This allows you to make multiple copies of your data.

This feature is useful for those who need to make multiple catalogs for different purposes. For example, you could complete your catalog for the wholesale market, make a backup copy of it, open that copy and make the changes necessary for the retail market.

Company Banner

Each data file you create might represent a different market or perhaps even a different company. In this case you may need a different banner for each data file. Click the Configuration button to select this banner.

The company banner you select will be displayed at the top of every form in CleverCat. If you have multiple data files, you can go to the Configuration form and select a new Banner File for each Data File. As you switch between Data Files, the graphic at the top of the form will change to provide a simple reminder as to which file you are working with.

The banner space is optimized for the dimensions, 728 by 90 pixels. These dimensions were chosen because this a common banner size used on many websites. You may be able to use the same banner file you currently use for internet advertising as the banner in CleverCat

Keep in mind that most graphics intended for displaying on your monitor are formatted at a resolution of 72 dpi. This means that they may be too coarse for printing. While most printers are capable of printing at resolutions of 600, 1,200 or even higher dpi, you will probably want a file formatted for a minimum of 300 dpi if you intend to publish your catalog on paper. If you are only creating a PDF catalog, 72 dpi may be sufficient.

You can use a banner image of any dimensions you choose but the ratio, 728 by 90 (approximately 8:1), is the optimum to fill the banner space. Images are automatically “zoomed” to fill the space without distortion. This means that a higher resolution image of the same ratio but with dimensions of 1,456 by 180 pixels will also completely fill the banner space but that one of 728 by 180 (approximately 4:1) will be displayed at half-width.

The Importing Data Form

On the File Selection form, select the file that you want to import. CleverCat keeps a record of each file that you import so that you do not have to re-select the importing options each time if you are continually updating the spreadsheet and using it to update the database. If you make significant changes to the spreadsheet, such as adding an additional column, check the Data Window on the lower half of this form to ensure that those changes are shown here. Click the Refresh button to force CleverCat to re-examine the spreadsheet if your changes are not displayed.

Important: This form provides a “Window” into the actual spreadsheet. You cannot open the same file with two different programs so be sure to first close Excel or any other program which may be using this file.

Formatting

In the Spreadsheet Window on this form, you may notice that some of the data in your spreadsheet is replaced with the characters: “#Num!”. Before a spreadsheet can be imported, all numbers, dates and cells derived from formulas must be formatted as text. Even if you do not see these characters, your spreadsheet data may still need to be reformatted. This is especially true if one of the spreadsheet columns contains a mix of text and numbers. The On-line Tutorial on this form has a detailed demonstration of formatting cells in Excel.

If you get an error during the Import process, refer to this tutorial for more instructions. Briefly, the steps are: In Excel, select the column by clicking the Column Header. Next, select “Text to Columns” from the Data Menu to open the formatting wizard. On the first two steps of the wizard, just click the Next button. On step three, select Text as the Column Data Format and click Finish. Repeat this process for all columns containing numbers.

At the bottom-left of the File Selection form is an Export button. Click this to export the entire database to an Excel spreadsheet. The filename displayed in the box at the top of the form is the one that will be used. If the file does not exist, it will be created by the Export function.

CleverCat creates an internal numbering structure and importing a spreadsheet and then exporting to the same spreadsheet is a good way to view these numbers. These number can be used later as a reference if you want to use Excel to update your data and re-import just the changes into CleverCat’s database.

The Data Mapping Form

* Category	<input type="text" value="Category"/>	
SubCategory	<input type="text"/>	
* Inventory Group	<input type="text" value="Product"/>	see tutorial
Photo 1	<input type="text" value="Photo"/>	
Photo 2	<input type="text"/>	
Print Order	<input type="text"/>	
Sort Order	<input type="text"/>	
Page Number	<input type="text"/>	
Page Postion	<input type="text"/>	
Inventory Index	<input type="text"/>	
Category Label	<input type="text" value="Category"/>	

“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.

When you make a selection for Category, the same selection is automatically added to the Category Label box. Category names in CleverCat must be unique but they can share a Category Label. The Category Label is the text that prints at the top of the page if that option is selected. This is useful if you need to divide your products into multiple categories for ease-of-use but want them to appear to print as a single category.

For example, you may have data organized as different categories: Accessories A – J and Accessories K – Z, but want them to print as a single category: Accessories. In this case you might choose a different column from your spreadsheet for the Category Label selection.

For the Category selection, do not use data containing special characters such as apostrophes or backslashes. The Category name is used throughout CleverCat for purposes of sorting and selection and some special characters will cause errors. Special characters can be used in the Category Label.

The selection: SubCategory, is used to separate a logical break between products within a category. In your spreadsheet, this column would not have a value recorded in every row. As shown below, this field only prints in Dynamic Printing Templates and the SubCategory text “Long Sleeves” prints between items in a category.

B	C	D
Category	SubCategory	Product
T-Shirts	Short Sleeves	Beefy-T T-Shirt - Short Sleeves
T-Shirts		Beefy-T T-Shirt - Short Sleeves
T-Shirts		Beefy-T T-Shirt - Short Sleeves
T-Shirts		Tagless T-Shirt - Short Sleeves
T-Shirts		Tagless T-Shirt - Short Sleeves
T-Shirts		Tagless T-Shirt - Short Sleeves
T-Shirts	Long Sleeves	Ultimate Cotton Pocket T-Shirt
T-Shirts		Ultimate Cotton Pocket T-Shirt
T-Shirts		Ultimate Cotton Pocket T-Shirt
T-Shirts		Ultimate Cotton - Long Sleeve
T-Shirts		Ultimate Cotton - Long Sleeve
T-Shirts		Ultimate Cotton - Long Sleeve

Product	SKU	Size	Price
Beefy-T T-Shirt - Short Sleeves	516971	Small	\$ 8.40
Beefy-T T-Shirt - Short Sleeves	516972	Medium	\$ 8.40
Beefy-T T-Shirt - Short Sleeves	516973	Large	\$ 8.40

Tagless T-Shirt - Short Sleeves

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

Long Sleeves

Ultimate Cotton Pocket T-Shirt

Product	SKU	Size	Price
Ultimate Cotton Pocket T-Shirt	507501	Small	\$ 8.90
Ultimate Cotton Pocket T-Shirt	507502	Medium	\$ 8.90
Ultimate Cotton Pocket T-Shirt	507502	Large	\$ 8.90

Inventory Grouping

The next selection, Inventory Group, logically groups together related items and also creates the Detail Table structure for more efficiently displaying related products under a single photograph. In your spreadsheet, there may be several columns with data which groups together related items. Related items typically share a common photo so this is often a good choice for the grouping field. In the example above, Column D in the spreadsheet snippet contains the product description which is common to the three available sizes.

A	B	C	D
Print	Sort	Category	Product
1	1	T-Shirts	Beefy-T T-Shirt - Short Sleeves
1	2	T-Shirts	Beefy-T T-Shirt - Short Sleeves
1	3	T-Shirts	Beefy-T T-Shirt - Short Sleeves
2	1	T-Shirts	Tagless T-Shirt - Short Sleeves
2	2	T-Shirts	Tagless T-Shirt - Short Sleeves
2	3	T-Shirts	Tagless T-Shirt - Short Sleeves
3	1	T-Shirts	Ultimate Cotton Pocket T-Shirt
3	2	T-Shirts	Ultimate Cotton Pocket T-Shirt
3	3	T-Shirts	Ultimate Cotton Pocket T-Shirt
4	1	T-Shirts	Ultimate Cotton - Long Sleeve
4	2	T-Shirts	Ultimate Cotton - Long Sleeve
4	3	T-Shirts	Ultimate Cotton - Long Sleeve

Your own spreadsheet may have no data suitable for grouping related items. In this case, you would leave the Inventory Group field blank and create your own sorting numbers. (see Inventory Grouping Field on page 15 for more information)

In this example, there is a Print and a Sort column in the spreadsheet. The data is organized in four groups of three related products. A Print column has been created, numbering each group with the same number. A Sort column has also been added, numbering each product sequentially within the groups.

By creating a numbering system as shown in this example, the Detail Table structure will be created when these two columns are imported as the Print Order and Sort Order selections.

The Page Number and Page Position selections are unlikely to correspond to data in your spreadsheet. Page Numbers and Positions are assigned by CleverCat for Feature Printing Templates. These field selections may be used if you export your CleverCat database to a spreadsheet and re-import it or import it into another Data File.

Images are not stored in the database. Instead, only the filename is recorded in “Photo 1” or “Photo 2” and this is used at print time to create a link which displays the file. The best method is to record just the filename in the database, not the path and filename. For example, if your file is “C:\myPhotos\Photo1.jpg”, your spreadsheet should just contain “Photo1.jpg”. On the Category Editor form, you can specify the folder where files are stored.

For users who have not yet created their images, here is a recommended shortcut. Using Excel, create a formula that will use unique data to automatically create filenames.

	D	E	F	G
1	Category	Product	SKU	Formula
2	T-Shirts	Beefy-T T-Shirt - Short Sleeves	516971	516971.jpg
3	T-Shirts	Beefy-T T-Shirt - Short Sleeves	516972	516972.jpg
4	T-Shirts	Beefy-T T-Shirt - Short Sleeves	516973	516973.jpg
5	T-Shirts	Tagless T-Shirt - Short Sleeves	514221	514221.jpg
6	T-Shirts	Tagless T-Shirt - Short Sleeves	514222	514222.jpg
7	T-Shirts	Tagless T-Shirt - Short Sleeves	514223	514223.jpg

In this screenshot, you can see that the field G2 contains the formula =CONCATENATE(F2,".jpg") and the result combines the contents of F2 with the text ".jpg". Using Excel's AutoFill function, you can easily drag and copy this formula down the entire column. This has the effect of creating unique filenames for each product. Now, when you create your photos, simply name them to match the products.

The selection, Inventory Index, will be discussed at the end of this chapter because it will make more sense once Importing has been explained.

There are twenty standard fields available to import your spreadsheet columns into. You do not have to make a selection for each of these fields and it does not matter in what order you select them (see the HTML Shopping Cart section on Page 30 for the exemption to this rule) or even if you select fields which you will not print. Later, during the Template Design process, you will decide which of your imported fields you want to print.

Beside each of the twenty field selections, there is a descriptive field label. These will not correspond to your own spreadsheet data so just click these labels and change them to something more suitable. This is not a necessary step but should make it easier to recognize your own data.

There is an additional special field labelled "Notes" at the bottom of the third column of selection boxes. Each of the standard data fields can hold a maximum of 255 characters. The Notes field can hold an unlimited amount of text. If your data has a column with long descriptions that exceed 255 characters, you will need to select that column as the Notes selection.

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, choose "All Records". With a Source and Database selection made, you can use the "Unique Records" option to add new records to the original spreadsheet and re-import it without creating duplicate records.

The last selection on the Data Mapping form is the Auto Sort option. AutoSort works together with the Inventory Group selection to create the Print and SubOrder numbers required for the Detail Table as well as the Page and Position numbers required for Feature Printing Templates.

Print / SubOrder	Page / Position	Inventory Group
1	1	1
1	2	-
1	3	-
2	1	2
2	2	-
2	3	-
3	1	3
3	2	-
3	3	-
4	1	4
4	2	-
4	3	-

This screenshot shows the results of importing. The Print Order numbers match up with the grouped records in the Inventory Group column and the SubOrder numbers are sequential within each group.

Page and Position number are indicated only for the first record in a group. Subsequent records will be within the Detail Table and share the same Page / Position as the first record.

The AutoSort function can be applied at any time after importing. There is an AutoSort button on most of the data-related forms in CleverCat. If you are unsure about using the AutoSort function, you can leave the Inventory Group field blank and the Auto Sort option unchecked. Later, you can select any of your imported columns and use AutoSort.

Appending and Updating

Append

Update

After all the field selections have been made, click the Append button to add the rows in the spreadsheet to the database.

Returning to the Inventory Index selection, this is not required but may be useful if you intend to use Excel to maintain your catalog data. To do this, CleverCat needs to be able to match rows in the spreadsheet with records in the database and an Inventory Index is a simple way to do this. This field would typically be a unique number and you can use Excel's AutoFill function to quickly add a sequentially numbered column to your spreadsheet.

Compare a field in the source data with a field in the database.

Source

Sequence

Database

Index

On the File Selection form, there is an Export button. When you export your database, the spreadsheet produced will contain the internal ID number CleverCat assigns to each record in the InvID column. Instead of creating an Index column, you can simply import the spreadsheet and then export it to create the InvID column with a unique number. However, this number will not necessarily be sequential or even begin at number "1".

If you decide to compare records using the databases internal ID number, as shown above, the correct database selection is "*Index*".

Of course, your data may already have values which uniquely identify rows. Part Numbers, Product Codes, etc. are usually unique. In this case, select that column as the Source selection and the field into which you first imported it as the Database selection.

Compare a field in the source data with a field in the database.

Source

Product

Database

Part No.

To update the database with changes you have made to the spreadsheet, select "Unique Records" as the Append Option and click the Update button. CleverCat will compare every row in the spreadsheet with every record in the database to find matching records. With a large spreadsheet and a large database, this process can take several minutes.

You can also use the Append button with the Unique Records option to add only new rows in the spreadsheet. Again, this can take several minutes as every record in the database must be compared against every row in the spreadsheet to identify new rows. For this reason, you may find it simpler to create and append a smaller spreadsheet containing only the new records.

The Data View Form

The Data View form is probably the easiest form to use for manually entering or editing large numbers of records in the database. 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
<input type="checkbox"/>	Cordless Phones	C:\Program Files\CleverCat\Photos\	2	9	Static Sample 1
<input type="checkbox"/>	Phones	C:\Program Files\CleverCat\Photos\	3	16	Dynamic Sample 2
<input type="checkbox"/>	Portable DVD	C:\Program Files\CleverCat\Photos\	2	10	Dynamic Sample 1
<input type="checkbox"/>	My New Category		-	-	
<input type="checkbox"/>	*		-	-	

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. SI
<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. SI
<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. SI
<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.

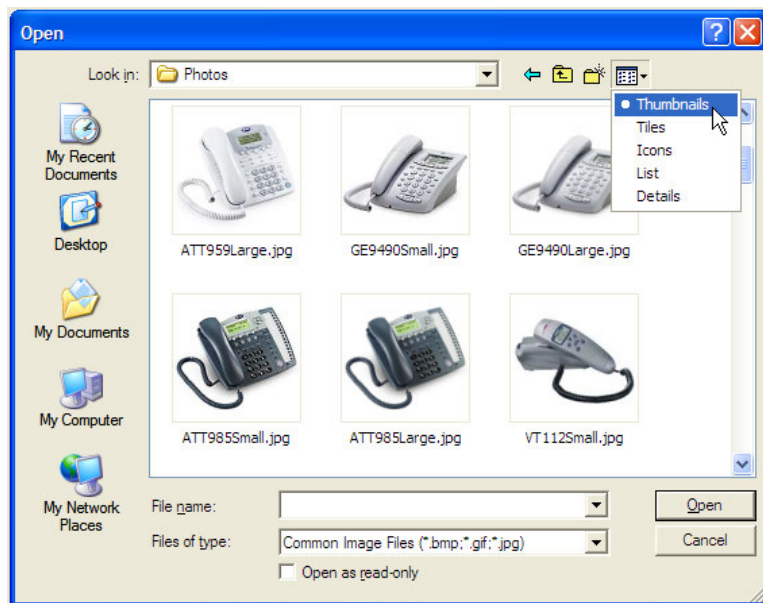
In the screenshot above, there is an Active Column as well as Print and Sub Order Columns. These columns are non-movable so they must also exist as the first three columns in your spreadsheet. You don't have to enter data in these columns, you can simply create three blank columns if you want.

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.

There are two ways to select blocks of cells in the Data Window. If you are using your mouse, select the starting cell and then press and hold down your Shift key. While holding down the Shift key, use your mouse to select the opposite corner of the block of cells.

To select a block of cells using the keyboard, move your cursor to the starting cell and press the F2 key. This will highlight all the text in the cell. Now, hold down the Shift key and use the Up, Down, Left or Right Arrow Keys to select a block of cells. The F2 key can be used anywhere in CleverCat to select an entire cell or data field.

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 Page 9) 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 (see Inventory Grouping Field on page 15 for more information). You can also change the printing order and regroup items by manually entering or changing the numbers in these columns.

Inserting a New Row

Unlike an Excel Spreadsheet, you cannot insert new columns. You can re-order them by dragging them to a new position and there is a button for changing the name of the currently selected column.

There is also a button for inserting a new row above the currently selected row and this will adjust the Print and Sub Order. In the screenshot on page 9, the third row has Print Order number "1" and Sub Order number "3". If this is the current row, the Insert a Row function will recognize that the new row will be in the middle of a group of products and give it the same Print Order number and Sub Order number "3". The current Sub Order number "3" will be re-numbered to "4" and this re-numbering will cascade through the entire group.

If the fourth row is current row when the button is clicked, the new row could be an additional row in the first group of products or an entirely new product group. In this case, CleverCat will ask you for clarification.

If the new row is a new product group, the Print Order number of the fourth row will be increased to "3" and this change will cascade through the entire category.

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 with a Category Window and a scrolling 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. It includes a 'Category' dropdown menu with 'My New Category' and 'Tagless' options. Below this is a grid of 'Custom' labels. The 'Product Notes' section has a large text area. 'Ad Text' and 'SubCategory' fields are at the bottom left. 'Photo 1' and 'Photo 2' sections show image thumbnails and file names 'tagless.jpg' and 'null.jpg'. The 'Inventory Group' field is on the right. 'Print / SubOrder' fields have values '1' and '3'. The 'Active Item' checkbox is checked. The 'Default Image Folder' field contains the path 'C:\Program Files\CleverCat\Photc'. The 'Template' dropdown menu shows 'Dynamic Sample 2'.

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. All text fields in CleverCat can contain multiple lines of text but you will not be able to see the extra lines on the Inventory form and not on the Data View form unless you increase the height of the row.

There is the same “Insert a New Row” button as on the Data View form and also an “Add a New Inventory Item” button. The difference is that the Add button creates a new record at the end of the current category while the Insert button can create one in the middle.



Most forms in CleverCat have a Print Preview button. This allows you to view the printed page on the screen without wasting paper. For complete control of all printing options, start your printing jobs from the Printing Menu.

Ad Text

SKU	Size	Price
516971	Small	\$ 8.40
516972	Medium	\$ 8.40
516973	Large	\$ 8.40

SKU	Size	Price
507501	Small	\$ 8.99
507502	Medium	\$ 8.99
507502	Large	\$ 8.99

**Free shipping
on all
On-line Orders.**

Spring and Summer

There is an “Ad Text” field on the Data View form as well. When you print a Dynamic Template, CleverCat attempts to fit as many Display Units on a page as it can without breaking them up. This means that there will frequently be space at the bottom of a column too small for the following Display Unit to fill.

The best way to correct this is to reorganize your products so that those with larger or smaller Detail Tables are in an order that best fills these empty spaces. You can also fine-tune your Template Design to change the height of your Display Units. Changing the Vertical Margins, choosing different fonts and even the widths of the fields can all change how many Display Units fit on a page.

The “Data Breaks Across Columns” option will also affect how many items fit on a page but if you have made all the changes you can to a Template and still have some blank space that you want to fill, Ad Text may be your solution. Identify blank spaces using a Print Preview and enter an appropriate amount of text in this field. Ad Text always prints below the Display Unit.

SubCategory Text

SKU	Size	Price
516971		\$ 8.99
516972	Medium	\$ 8.99
516973	Large	\$ 8.99

SKU	Size	Price
514221	Small	\$ 7.99
514222	Medium	\$ 7.99
514223	Large	\$ 7.99

Spring Collection

SKU	Size	Price
507501		\$ 8.99

SubCategory Text is only used for Dynamic Print Templates. Use this text to indicate a break in products within a Category. As shown here, the text “Spring Collection” has been inserted between two products in a column. SubCategory Text always prints above the Display Unit.

In all data, in all fields, Trailing Spaces and Carriage Returns are deleted. This means that you cannot add spaces at the end of a data field to increase the vertical space between a field and one below it. In the example here, you could have more space above “Spring Collection” by inserting spaces or a Carriage Return before the text, but not below.

Fortunately, there is a special character known as a “Non-Breaking Space” which can be added at the end of a field.

Special characters such as this can be inserted into most Windows applications and there are different ways to do this. Some Windows users will be able to insert a Non-Breaking Space by pressing the key combination Ctrl + Alt + Space. This varies between versions of Windows and other settings so if it does not work for you there is another method. Press and hold down the Alt key and then enter the numbers 0160. This must be done using the Numeric Keypad, not the numbers in a row at the top of your keyboard.

The Non-Breaking Space cannot be seen when printed so it can be used to increase vertical spacing. There are other useful special characters that can be added this way. For example, the Copyright symbol © can be inserted using Alt + 0169 and the Registered symbol ® using Alt + 0174.

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"/>	<input type="text" value="Part No."/>
	<input type="text" value="3"/> Max. Rows	Column 2	<input type="text" value="Part No."/>	Column 11
Linking Filename	<input type="text" value="Detail"/>	Column 3	<input type="text" value="SKU"/>	Column 12
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.		Column 4	<input type="text" value="Medium Desc."/>	Column 13
HTML Template	<input type="text" value="Dynamic Sample 2"/>	Column 5	<input type="text" value="Cost"/>	Column 14
	<input type="text" value="1"/> Max. Rows	Column 6	<input type="text" value="Price"/>	Column 15
Maximum Rows is the numbers of rows of Display Units, not the number of Products.		Column 7	<input type="text" value="Long Desc."/>	Column 16
		Column 8	<input type="text" value="Manufacturer"/>	Column 17
		Column 9	<input type="text" value="3rd Photo"/>	Column 18
		Column 10	<input type="text" value="Custom"/>	Column 19
				Column 20

<input type="button" value="Headers"/>	<input type="button" value="All Settings"/>	From: <input type="text" value="Phones"/>
		To: <input checked="" type="radio"/> This Category
		<input type="radio"/> All Categories

Creating a New Category

Create a new category by clicking the New button and entering a unique name. The Printed Name, or Category Label, does not have to be unique. This is useful if you need to organize large numbers of records into smaller, more manageable numbers but still want to print the same category name at the top of the pages. As well, you can use certain special characters in the Category Label that you cannot use in the name. For example, you can use apostrophes and backslashes in the Category Label but not in the Unique Name.

Default Image Folder

You can 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.

URLs cannot be used as the image folder but network locations can. For example, \\network\folder\ is a valid entry for the Image Folder.

Category Banner

Most users will print their company logo or banner at the top of the page but you can also give each category its own logo or banner. This image file can be in a different folder than the categories photos. Double-click the box to search for a file. If you enter a filename without a folder prefix, CleverCat assumes the file is in the Image Folder for the category.

WaterMark

Each category can have also have a Watermark Image. This image prints the full width and height of the page behind the text and product images. The watermark will be visible behind the text but not behind the product images, even if their background is white.

Price Markup / Discount

Prices in your catalog can be easily marked up or discounted without changing the recorded data. On the Printing Menu there is a Global Markup / Discount box that applies to all categories but each category can have its own Markup / Discount. This is entered as a percentage. For example, if you enter a value of -20, prices will be discounted by 20%. This feature is useful if you print catalogs for different customers or currencies.

Starting Page Number (T.O.C. Order)

If you need to reprint an individual category in the middle of your catalog, you can change the page numbers so that they continue from the previous category instead of restarting at page one. This value is also the T.O.C. (Table of Contents) order and determines the printing order of categories. It can also be changed on the Printing Menu.

Active Category Option

You may create categories of products that you do not use frequently. Instead of deleting those categories you can uncheck the Active Category box and the category will not show up on the Selection Lists. To re-activate an inactive category, click the Find button on this form to select and re-activate it.

Option Text, Page Prefix and Category Footer

Each category can have its own Category Footer text and this is printed centered in the footer. The Option Text prints on the side opposite the page number. This text is aligned against the page margin but if you enter too many characters, it could run into the Category Footer text. Each category can have its own Optional Text but on the Printing Menu there is another Optional Text box. If the field on the Printing Menu is filled in, it will over-ride the individual category text and print on every category.

The Page Prefix is added onto the Page Number. If your catalog uses data that is frequently updated, it may not be practical to try to use a continuous page number across all categories. In this case you may need to number each category starting at page 1 and a Prefix will help identify pages. For example, you might use a Prefix of "Supplies-" for a page numbering of Supplies-1, Supplies-2, and so on.

Selecting a Printing Template

The Template Selection drop-down box changes according to your templates. If you have not created your own templates yet, the selection list will show all the Samples templates included with the software. To reduce this list to a manageable level, when you create your own new templates, the Template Selection boxes will show only your own templates.

Column Header Labels

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.

Copying Categories

If you are adding categories manually, you may find it easier to customize one category, select folders, headers, etc. and then copy that category. The Copy button will create a copy of the current category with all its settings and prompt you for a unique name.

Inventory Grouping Field

The Inventory Grouping Field is optional but very useful for certain types of data. If you made an Inventory Group selection when you imported your spreadsheet, that column was imported into the Inventory Group column and can be seen in the Data Window on the Data View or Inventory form.

In this screenshot, you can see that the Product column from the spreadsheet was selected as the Inventory Group during the import. This results in a duplicate column which you would normally re-order to the far right of the Data Window or hide by dragging its width to zero.

If the Inventory Group selection was left empty on the Data Mapping form, then this column would be empty as well.

	order	order	Inv. Group	Product	Photo	Code	Size	
▶	<input checked="" type="checkbox"/>	1	1	Beefy-T T-Shirt - Short Sleeves	Beefy-T T-Shirt - Short Sleeves	Beefy.jpg	516971	Small
	<input checked="" type="checkbox"/>	2	1	Beefy-T T-Shirt - Short Sleeves	Beefy-T T-Shirt - Short Sleeves	Beefy.jpg	516972	Medium
	<input checked="" type="checkbox"/>	3	1	Beefy-T T-Shirt - Short Sleeves	Beefy-T T-Shirt - Short Sleeves	Beefy.jpg	516973	Large
	<input checked="" type="checkbox"/>	4	1	Tagless T-Shirt - Short Sleeves	Tagless T-Shirt - Short Sleeves	Tagless.jpg	514221	Small
	<input checked="" type="checkbox"/>	5	1	Tagless T-Shirt - Short Sleeves	Tagless T-Shirt - Short Sleeves	Tagless.jpg	514222	Medium
	<input checked="" type="checkbox"/>	6	1	Tagless T-Shirt - Short Sleeves	Tagless T-Shirt - Short Sleeves	Tagless.jpg	514223	Large
	<input checked="" type="checkbox"/>	7	1	Ultimate Cotton Pocket T-Shirt	Ultimate Cotton Pocket T-Shirt	Ultimate1.jpg	507501	Small
	<input checked="" type="checkbox"/>	8	1	Ultimate Cotton Pocket T-Shirt	Ultimate Cotton Pocket T-Shirt	Ultimate1.jpg	507502	Medium
	<input checked="" type="checkbox"/>	9	1	Ultimate Cotton Pocket T-Shirt	Ultimate Cotton Pocket T-Shirt	Ultimate1.jpg	507502	Large

The data in the Inventory Group column is more convenient to use because it can be seen while editing data in either Data Window. However, the Inventory Grouping Field selection on the Category Editor form supersedes the Inventory Group Column data. In the example above, selecting “Code” as the Grouping Field would cause the data to be grouped by the data in the Code column even though there is valid data in the Grouping Column. Similarly, if the Grouping Column was empty, a Grouping Field selection of “Product” would group the data by Product as shown above.

The purpose of this selection is to provide flexibility for certain types of data. For example, if every row in a category had its own unique photo, you could change the Field selection to the Photo column and print a sheet of thumbnails of every product. Then, you could change the Field selection to the column which groups rows into related products and print a different template with the photo of the first product in the group along with a Detail Table of the related rows.

HTML Templates

CleverCat - Professional Version can also produce HTML files. These HTML files are designed to be displayed in an Inline Frame on your website and can closely resemble printed templates. You can also create and select different templates to be used for this purpose.

The Maximum rows setting is used to specify how many rows of products, not total items, will be displayed in the Inline Frame. If the category T-Shirts uses a template which has 3 columns of products and you select 4 rows, then each page in the frame will display 12 items, except possibly the last page if there are not enough items to fill the page.

The purpose of the Linking Filename is easiest to understand if you consider a typical shopping site. Commonly, there will be a page of product thumbnails. If you click any of these products, you will be taken to another page with more detailed information.

CleverCat names the HTML pages it creates with the category name and the page number. In the example above, CleverCat will create the files “T-shirts1.htm”, “T-shirts2.htm”, and so on until all the products are added.

If the Linking Filename is set to “Detail”, then a second set of HTML files will be created as well, using the second HTML Template selection. These files will be named “Detail1.htm, Detail2.htm, Detail3.htm” and so on. When a user clicks any image in T-shirts(n).htm, it will link to and open the corresponding Detail(n).htm file.

The number of “Detail(n).htm” files created depends on the number of columns in the second HTML Template as well as the Max. Rows setting for the second template. Typically, you would use a template with only one column and set Max. Rows to “1” to create one Detail(n) file for every product. However, the setting is flexible and if you were to use a second HTML template which had 3 columns, only one Detail(n).htm file will be created for every 3 products in the T-Shirts(n).htm file. In this example, clicking the image in any of the first 3 products in T-Shirts1.htm will open Detail1.htm.

See the chapter: HTML Files for more information on using HTML tags to customize this feature.

The Template Editor

CleverCat can create and store an unlimited number of Printing Templates. Click the Template Designer button on the Main Menu to begin.

There are two grouping of Templates. Click either "Sample Templates" or "My Templates" to view these groups. Template that you create or copy are placed in the My Templates group. Additionally, when you make a template selection on the Category Editor form, the selection lists contains only sample templates if the My Templates group is blank. Once you have added a template to the My Templates group, only this group will be available in the Template Selection drop-down boxes.

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.

If you have already created one template you may find it easier to create additional templates by clicking the Copy button to create a new template matching an existing one. This is also a good strategy if you want to make significant changes to a template. Make a copy of the current template so that you can return to the original template if you are not satisfied with the changes.

You can export your Printing Templates to a file that you can share with other CleverCat users. Click the Export button to display checkboxes on the Template List. Select all the templates that you want to export and click the Export button again to create the file.

If you need technical support or advice regarding Printing Templates, we may ask you to use the Export function to send us your template.

The Import function will allow you to install templates created by other users. Click the Import button to search for a downloaded file containing templates. For each template in the download file, you will be asked to provide a new name. If you require technical assistance with templates, this is the method we will use to send you a custom template or updates to a template you sent to us.

Also on this form is the option for Inches or Millimetres. You can change this option as required and your page margins and other values will be converted as required. If you are exporting a template, you do not have to be concerned about the units used by the recipient of the file. Exported templates are converted to millimetres and then converted back to the units used by the recipient when the file is downloaded.

The Index Page and Table of Contents are Printing Templates like any other with the exception that they draw data from all categories. There are Index and Table of Contents buttons on this form used to select those templates. You can make all the same Page and Display Unit customizations for these templates as you would for any other.

NOTE: If you are sending a template file to support@clevercatalogs.com, you do not have to zip it or rename it. *.mdb and *.mdt files are frequently blocked by mail servers because they might contain viruses. As we frequently receive these files, our mail server does not block them. However, when we return a file to you, unless you let us indicate otherwise, we will normally "zip" it to get past your mail server.

Creating a Printing Template

To get started, click the Page Setup button to open the Editor for the currently selected template.

The screenshot shows the 'Page Setup' dialog box with two tabs: 'Page Dimensions' and 'Margins'. The 'Page Dimensions' tab is active, showing settings for Paper Size (Letter), Header? (checked, 0.60), Footer? (checked, 0.40), Header Spacer (0.04), Footer Spacer (0.02), Data Option (1), Display Columns (2), Layout # (1), Duplex Data (unchecked), Alternating Data (unchecked), Page Num. Width (0.40), Corner Radius / Line Thickness (40 / 20), Height Adjust (0), and Display Unit Borders (checked). The 'Margins' tab shows Top (0.35), Bottom (0.35), Left (0.35), and Right (0.35) margins, with options for (Inside) and (Outside). The preview on the right shows a page with a blue header area labeled 'Category', a blue footer area labeled 'Optional Text', and a grid of four blue display units. The page number '1' is visible in the bottom right corner of the preview.

Currently, Printing Templates can only be created for Letter and A4 sized paper. Select the paper size that matches your printer's capabilities. The Sample Page on the right-side of this form will preview your settings. In this screenshot there are four Display Units in a 2 x 2 grid.

Page Margins

The default margins are 0.35" or 6.35mm. Most printers should be able to work with these margins but increase them if you find the edges of your data are being cut off or you see an error message indicating there is not enough room on the page.

Top and Bottom Margins can be adjusted independently for both Feature and Grid/Dynamic Templates but Left and Right Margins must be equal for Grid/Dynamic Templates as these are always centered on the page.

When printing a Feature Template, you can increase the margin on one side to allow more room for page binding. If the Duplexing option is selected on the Printing Menu, the Left and Right Margins swap sides with every page so the margins are also referred to as Inside or Outside.

Page Header and Page Footer

The Page Header is the area at the top of the page where the company logo and Category Label can be displayed. Use the checkbox next to the Header label to enable or disable the Header. Change the height of the Header to better fit your logo or banner. Your logo or banner will be automatically "zoomed" to fit the available space. For example, if you are using a banner of 8" x 2" and set the Header height 1", then the banner will be shrunken to 4" x 1" so that it will not be distorted.

The controls for the Page Footer are identical to those for the Header. Use the drop-down boxes to select the Header or Footer Option. The sample page will display a rough preview of the selected option. Use the Print Preview button at the bottom of the form to get an accurate preview.

Experimentation or "Trial-and-Error" is the best method for using this form. Explore different options to get the look you want. Remember to make copies of Templates so that you can go back to previous settings. Depending on the option you select for your header, certain other options may or may not be available.

If you need to increase the space between your catalog data and the Header or Footer, use the Header or Footer spacer. You can also change the color of this space by clicking the colored boxes next to the Spacer settings and choosing a color from the selection dialog.

Display Units

In this section you choose either a Grid, Dynamic or Feature Print Template. Grid and Feature Templates print a pre-defined number of Display Units. Dynamic Templates are organized into columns and the number of Display Units that fit on a page will vary according to the data. Memory usage is also a consideration. Grid and Dynamic Templates “re-use” the memory needed to create them while Feature Templates do not. This means that a Feature Template with just four Display Units will use four times as much memory when printing and your system can easily run out of memory.

Data Option	1	▼	Static - Grid Pattern
Display Columns	2	▼	Rows 2
Layout #	1	▼	

If you are just experimenting with Template Design, start with a Grid Template. These are easier to design because you layout the fields exactly as you would have them print.

Dynamic Templates are a little more difficult to design because you place fields by the minimum size you want them to print and expect them to grow to accommodate the data.

The option you choose for your catalog depends on your data. Grid and Feature Templates are better suited to artistic or stylistic catalogs because you have greater control over the placement of elements on the page. Dynamic Templates are better suited to catalogs where the amount of descriptive text varies between products. Dynamic Templates are usually the better option when the goal is to reduce the number of printed pages because they compact the data most efficiently.

If you select a Feature Template, your next option is Display Units. If you select a Grid or Dynamic Template, this option will be Display Columns and, in the case of Grid, Display Rows as well. When you make these selections, the sample page on the right-side of the form shows a generalized layout of the print template. This is only intended as an example and the actual printed page may be different depending on how many Display Units are created by your data.

The last selection for Display Units is Layout. For a Feature Template, there are a variety of patterns available for each number of Display Units.

Print / SubOrder	Page / Position		
1	1	1	1
1	2	-	-
1	3	-	-
2	1	1	2
2	2	-	-
2	3	-	-
3	1	1	3
3	2	-	-
3	3	-	-

When you use the AutoSort function, each item in the category is given a Position number and this is order in which the Display Units are filled. The printed Position generally progresses from left-to-right and top-to-bottom.

Feature Templates have a single, larger Display Unit which is referred to as a Feature Unit (or a +1 Display Unit). For these layouts, the item given Position number 1 will be printed in the Feature Unit and the remaining items will print in their proper order from top-left to bottom right.

If the Feature Unit is on the right-side of the page, it could be the item given Position number 2 that now prints at the top-left corner of the page.

The Layout selection for Grid and Dynamic Templates is either “Across then Down” or “Down then Across”. When Across the Down is selected, Display Units are printed in rows, not columns. This means that the top edge of the Display Unit will line up with the top edge of other Units in the same row, regardless of the height of Units in the row above. When Down then Across is selected, the Display Units will print in columns. This is the better option when the goal is to reduce the number of pages as it compacts more Display Units onto a page. With this option, the top edge of one Display Unit may not line up with the top edge of another unit in the next column.

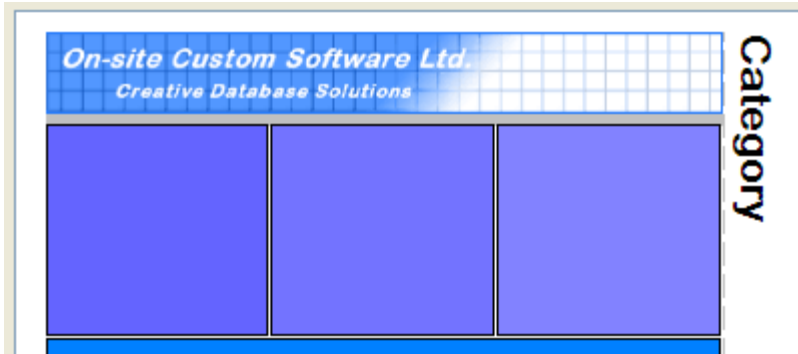
You can change these options at any time and look at a Print Preview to find the best option for your data.

Customizing Text

On the Page Setup form you can change the appearance of the Category Label, the Page Number, Footer Text or Optional text. Click any of these on the Sample Page and that name will appear in the Active Cell box. Next, click the Font button, select a font size or click the Bold, Italic or Underline buttons to change these attributes. You can also change the color and background of the text by clicking the Color or Shading boxes and selecting a new color through the Selection Dialog.

Additional Options

In this section, there are a number of options that vary depending on previous selections. Some of these options are only available when certain Page Header options are selected.



For example, Category Tabs are only available with Page Header options which do not include the Category Label.

The Category Tab prints your Category Label sideways along the edge of the page. This feature also works only with Feature Templates.

You may have to change the Page Margins, the Category Label font and the Tab Width to fit the Tab on your page.

Display Unit Borders

There are four options for Borders in CleverCat. Off, Hairline, 1-Point and Rounded. Hairline and 1-Point are provided for compatibility with different laser printers. On some printers, Hairline and 1-Point are identical. On others, Hairline is almost invisible. Rounded Corners does not work with the "Data Breaks Across Columns" option.

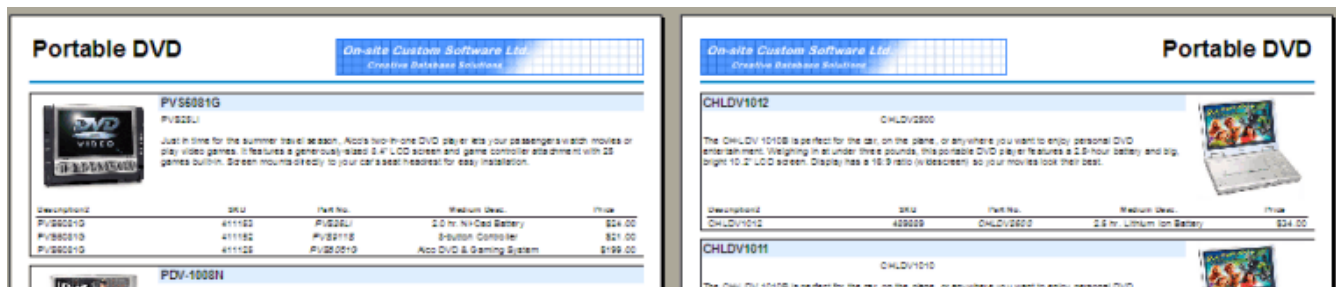
Finally, when looking at a Print Preview, you may notice that borders may appear to overlap, disappear or not align with other borders. These imperfections can change at different zoom levels but they only appear in Print Previews. When printed on paper or to a PDF, the borders will print correctly.

Working Category

When working with the Template Design forms, you need to select a category to provide sample data for Print Previews. Select a Working Category from the drop-down box at the bottom of the form.

Duplex Data

Duplex Data works together with the Duplex Printing option on the Printing Menu. In the example below, the Page Header elements switch sides because the Duplex Printing option is selected but it is the Duplex Data option that causes the Photo and text elements of the Display Unit to change sides as well.



Index Sorting Field

The Index Sorting option only shows up when you select "Index Page" on the Templates Menu. By default, an Index Page will be sorted alphabetically by the first Data field, even if this field is not included in the Template Design. You can choose to sort your Index Page by another field or even by Page Number.

Designing a Grid or Feature Display Unit

Open the Display Unit design form by clicking the Display Unit button or double-clicking any of the Display Units on the Sample Page. Double-click the Feature Unit on the Sample Page to open the design form for the separate Feature Unit

The Display Unit design 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 in the Display Unit. Each Label / Field pair is identified by the Header Name you gave them on the Category Editor or Inventory form.

Field Placement

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. Fields are allowed to overlap but this will make it difficult to resize them by dragging.

Optionally, you can enter the field dimensions manually. This is useful if you are trying to align fields exactly. When you click a field in the Display Unit, its name appears in the “Active Cell” box. You can now enter its relative dimensions and position in the four boxes – Left, Top, Width and Height.

Active Cell	Photo1		
Left	0.00 %	Top	8.00 %
Width	54.00 %	Height	56.00 %

[Return to Stack](#)

Positions and dimensions are recorded in percentages relative to the Display Unit. Referring back to the Page Setup form which showed four Display Units, you can see that the Display Unit on this screenshot is the same shape as those on the Sample Page.

In the screenshots above, Photo1 is the Active Cell and its Left position is 0, the left edge of the Design Pad, 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 Design Pad.

Display Units have their own margins. Increase the Vertical and Horizontal Margin settings to create more room between Display Units.

The Grid value can be set from 1 to 10 and changes how fields are placed and sized by dragging. A Grid value of 1 allows values of half of one percent – 9.5, 10.0, 10.5, 11.0, etc. A Grid value of 2 allows full percentage values – 9, 10, 11, etc. Larger Grid values will make it easier to line up fields but make it harder to fine-tune placement of fields.

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. To conserve memory and reduce the possibility of memory-related crashes or Windows Freezing problems, Print Previews in the Design forms are limited to the first page of data. Memory and photo-size issues will be covered in greater detail later.

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.

Designing a Dynamic Display Unit

Product

Photo1

SKU
516971

Notes

Detail Table

This space represents only 1/2 page height

Designing a Dynamic Display Unit uses all the same steps as designing a Grid Unit. However, the Display Unit shown on the form does not represent the proportions of the printed Display Unit. Instead, the height of the Display Unit on the form represents half the printed page height and its width on the form represents the width of the printed Display Column.

If you compare this Display Unit with the one on the previous page, you will see that the same fields are used but, instead of filling the entire Design Pad, the fields are compressed near the top. As well, some of the fields are much shorter than the expected height of the text. This is because we expect the fields to grow to fit the text.

When a field grows, the fields below it are pushed down. You can see this in the Print Preview screenshot below. The Product field has grown and pushed down the Photo and all the other fields as well. The SKU Label and the SKU Field have grown and pushed down the Notes Field. On the design form, the Notes field starts about 25% of the way down the Photo but, on the Print Preview, it is closer to about 40%.



Beefy-T T-Shirt - Short Sleeves



SKU
516971

Ultra-soft cotton - feels great. Shoulder-to-shoulder tape makes it long-lasting. Full-cut for a roomy fit. 100% cotton.

Product	SKU	Size	Price
Beefy-T T-Shirt - Short Sleeves	516971	Small	\$ 8.40
Beefy-T T-Shirt - Short Sleeves	516972	Medium	\$ 8.40
Beefy-T T-Shirt - Short Sleeves	516973	Large	\$ 8.40

Another way of looking at Dynamic Template design is that you are setting the Minimum height of the Display Unit. Fields will shrink to nothing if there is no data in them but The Display Unit will not shrink to nothing. A minimum height, enough to fit all the placed fields, is reserved for the Display Unit. In this example, the bottom of the Detail Table sets the minimum reserved height.

If there were no data in the Detail Table and the Product field was empty, the Photo would move up by the amount reserved for the Product field. The Display Unit will not shrink beyond the reserved space so, when printed, there would be the same thin blank white space above and below the Photo.

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

TIP: Start a Dynamic design by turning on the Display Unit Borders and placing a single field. Move this field up or down to set the minimum height of the Display Unit.

The Display Unit will grow to fit the fields as they grow to fit the text. In the first Display Unit, there three rows in the Detail Table. As a result, the Display Unit itself is taller, by one row, than the one below it. This is why a Dynamic Template is usually the better option when the data is variable and you want to reduce the overall number of pages.

Ultimate Cotton Pocket T-Shirt

There are many variables that will change how many pages a Dynamic Template requires. For example, decreasing the

Vertical Margin between Display Units may decrease the number of Display Units on one page but, because this change cascades through the entire category, it may actually increase the number on another page.

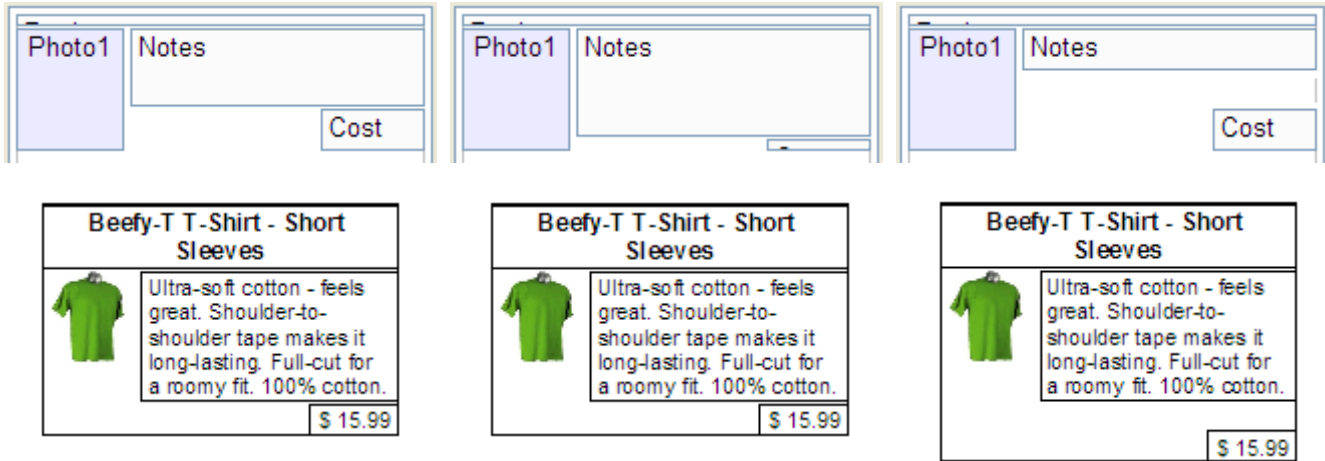
The best way to understand designing Dynamic Templates is to experiment with field placement and Print Preview to see the results. However, in addition to those described above, there are a few rules that fields will observe for growing and shrinking.

Field Growing and Shrinking Rules

Back on the Page Setup form, there is an option labelled “Fields Grow and Shrink”. Your options are: “All fields Grow and Shrink”, “No fields Grow or Shrink” and “Only the Detail Table and the Notes Field Grow or Shrink” to fit the number of rows or lines of text.

If you select “No fields Grow or Shrink” then you could design the Display Unit much the same way you would a Grid Display Unit, by placing and sizing fields exactly as you want them to print. In fact, you can use the “Grow and Shrink” option on Grid Templates as well but, because the Display Unit will not grow, you have to carefully consider how much your data will cause other fields to move around or you could cut off some of your data.

Let’s consider the following three examples. We’ve placed borders around all the cells as well as the Display Unit to make it clear how fields are adjusted.



In the first two designs, the only difference is the heights of the Notes and Cost Fields. However, the bottom of the Cost Field has not changed so the minimum height reserved for the Display Unit has not changed either. The Notes Field grows the same amount in either design so there is no difference in the printed output. In the third example, the Cost Field is in the same position but there is a space between the Cost and Notes Fields. In the printed output, this space is retained and the Cost is printed lower, increasing the height of the Display Unit.



In the first group of three examples we referred only to the separation between the Cost and Notes Fields. However, the separation rule actually applies between every field and every other field. The design has a minimum separation between the Product Field and the Cost Field but, because the Notes Field always grew between them, that minimum separation was not noticeable.

In the first example in this group, we’ve allowed the Cost Field to overlap the Notes Field. When two fields overlap vertically, the separation rule between them is cancelled. The Notes Field still grows but does not affect the Cost Field and now the separation between the Product and Cost Fields can be seen. The Cost Field appears to move up slightly but is in exactly the same place it would be if there were no data in the Notes field.

In the second example in this group, we've allowed the Notes and Cost Fields to touch. The separation rule still applies except that the separation distance is zero.

In the last example in this group we've allowed fields to overlap horizontally. This has no effect on separation. The separation and cancellation rules apply only to vertically overlapping fields.

Product	Notes
Cost	Color
Description	

The vertical separation rule applies even if fields are not aligned vertically. In this example, the separation between Notes and Description stays the same as Notes grows.

Beefy-T T-Shirt - Short Sleeves	Ultra-soft cotton - feels great. Shoulder-to-shoulder tape makes it long-lasting.
\$ 15.99	White
Full-cut for a roomy fit. 100% cotton.	

There is a minimum separation between Product and Color in this design but it is forced to be greater than that minimum by the growth of Notes. Cost and Color overlap vertically so there is no separation rule between them.

If some of your fields will contain no data, then you need to consider how this will affect the separations. For example, using the same design, if the Product, Cost and Notes Fields are empty, as shown below, there would be a number of blank spaces as all the various separation rules are applied.

	White
Full-cut for a roomy fit. 100% cotton.	

Creating a better design may take some experimenting. You can start by decreasing the heights of the field that you know will occasionally be empty.

Description	Notes
	Color

Consider this design. Although it cannot be seen, the Cost Field is still placed between the Product and Description Fields. The height has been reduced in the design to just 0.3%.

Beefy-T T-Shirt - Short Sleeves	Ultra-soft cotton - feels great. Shoulder-to-shoulder tape makes it long-lasting.
15.99	White
Full-cut for a roomy fit. 100% cotton.	

The Notes Field overlaps the Product, Cost and Description Fields, cancelling the separation rule between them and the Notes Field. If the Cost Field has a value, it grows to fit. If it is blank, it disappears and leaves only the small reserved space between Product and Description.

Beefy-T T-Shirt - Short Sleeves	Ultra-soft cotton - feels great. Shoulder-to-shoulder tape makes it long-lasting.
Full-cut for a roomy fit. 100% cotton.	White

The separation rule is still in place for the Color Field and the fields above it so, if the Notes field were blank, it would still start a little below the Cost Field.

Description	Notes
	Color
Size	

Empty fields can affect the minimum height of the Display Unit itself. In this example, the Size Field is blank but a space was reserved for it so the Display Unit has a blank space when printed.

Beefy-T T-Shirt - Short Sleeves	Ultra-soft cotton - feels great. Shoulder-to-shoulder tape makes it long-lasting.
Full-cut for a roomy fit. 100% cotton.	White

The best approach to Dynamic Template Design is to set the size of the field to be roughly equal to the size it needs to be for the smallest amount of text in your data. When designing a Grid or Feature Template, or when the Fields Grow and Shrink option is disabled, the best approach is to set the size of the field equal to the largest amount of text.

If you have any difficulty with Template Design, send us a sample of your data along with a picture or link to the type of template you are trying to design and we'll create one for you at no charge. We can even do custom designs that go beyond what is possible using the Template Editor. For example, we have created custom templates where the data in a field is the result of a formula which varies depending on the contents of two or three other fields. This type of custom work is well beyond what can be done with the Template Designer so we'll provide you with samples and a quote for the design costs before you commit to making a purchase.

Data Breaks Across Columns

Beefy-T T-Shirt - Short Sleeves
SKU 516971
Ultra-soft cotton - feels great. Shoulder-to-shoulder tape makes it long-lasting.
SKU Size Price
516971 \$8.99
516971 \$8.99
516971 \$8.99

Ultimate Cotton Pocket
SKU Size Price
507501 Small \$8.99

Free shipping on all On-line Orders.

Ultimate Cotton - Long Sleeve
SKU 540111
Preshrunk cotton for the perfect fit. Narrow, reinforced collar resists raveling and rip-out. Tag-free collar. 100% cotton.

Tagless T-Shirt - Short Sleeves
SKU 514221

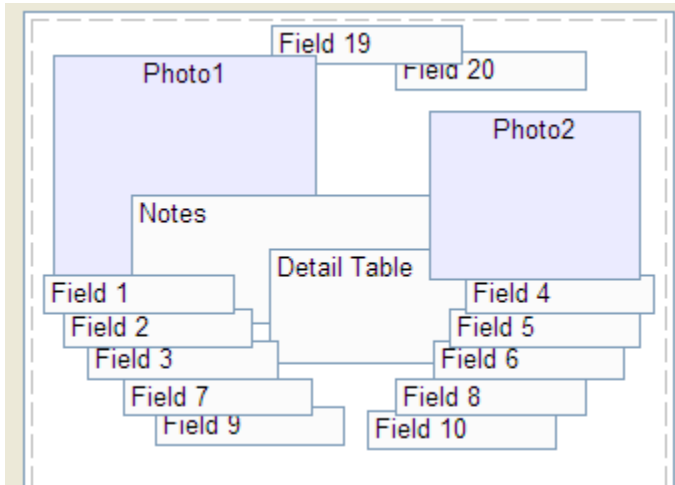
With Dynamic Templates, it is possible to have very long Detail Tables which span several columns or even several pages. If “Data Breaks” is not selected, CleverCat will attempt to both start and finish printing a product within a single column. With some data, this can result in large blank spaces at the bottom of a column.

“Data Breaks Across Columns” will allow the Detail Table of a Display Unit to be broken and continue printing on the next column if it cannot fit in the previous one.

In this example, the last row of a Detail Table was not able to print in the first column and has been printed at the top of the second column without the photo or other descriptions. The first Data Field “Ultimate Cotton Pocket” is repeated as well as the Detail Table Column Headers.

This option only works if the Detail Table is the bottom-most element in the Template Design. If another field is placed below the Detail Table, spacing errors could result.

Overlapping Order



There is a defined printing order for Fields and Photos, as shown here.

In General, Photo 1 prints behind everything else. The exceptions are Fields 19 and 20. There is nothing special about these fields except that, as the last two fields, they are less likely to contain data. These fields can be used to create special borders behind the photos or other fields.

For example, Field 20 could be given a background color and Field 19 could be placed on top of it with a white background. The effect, depending on the size of Field 19, would be of a wide, colored border. Any field or photo that you wanted to highlight could then be placed on top of Field 19.



In this example, Field 20 has a blue background and another text field has been placed on top of it with an off-white background (pure white actually prints as transparent).

Fields 19 and 20 are also excluded from the standard Shrinking rule when they are empty. Normally, a field that contains no data will disappear. Fields 19 and 20 can therefore be used to increase the minimum size of a Dynamic Template’s Display Unit and keep it from shrinking if its fields contain little or no data. In this way, a Dynamic Template can be turned into the equivalent of a Grid Template.

The Detail Table Form

Depending on your data, you may not need to use this form. If your data requires a Detail Table, be sure to drag the “Detail Table” field onto your Display Unit. Double-click the Detail Table field or click the Detail Table button to continue.

The Detail Table 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 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.

The selection for the option, “First Line in Detail Table repeats from Display Unit”, will depend on the structure of your data. If you refer back to the spreadsheet and data samples throughout this manual, 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 this case, it is necessary to use the “First Line Repeats” option so that data from the first row can be displayed in both the Display Unit and its Detail Table.

Your own data may be structured similarly, 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.

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 you select the option “Detail Table has Column Headers”, your Detail Table will be include a Header Row with the Column Headers you entered on the Category Editor or Inventory Form.

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 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.

The Notes Field

Each line in the Detail Table can have an additional Notes line. This line prints below the Data Fields and will be the full width of the Detail Table. To enable this feature, simply select a Data Source from the drop-down box. The Data Source selection does not have to be the special Notes field, the one that can hold an unlimited amount of text. However, if you choose that field as your Data Source, then this Notes field on the Detail Table will expand to print an unlimited amount of text the same way the Notes field on the Display Unit does.

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 Display Unit or Detail Table 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 an attribute and then click the Print Preview button to see how it looks.

Text, Numbers and Currency

The default field type is Text. If you select a field and change its attribute to “Number” or “Currency”, when printed, CleverCat will examine the field and format it as follows. If the field is empty, then nothing will be printed. If the value is zero, then nothing will be printed. If the value is a number, then it will be formatted as a number or computer as defined by your computer’s Regional Settings. If the value is not a number at all, but text, then the text will be printed.

Alignment and Justification

By default, all text will be Left-Aligned but you can change this to Centered, Right-Aligned or Justified. You can also change the alignment of your photo. Unless your photos are exactly the same shape as the space reserved for them, there will be some empty space on either side or below the photo. Use the Alignment buttons to Left, Center or Right-align the photo.

For the photo, the Justification button has a special function. Normally, your photos are fitted to the reserved space in such a way as to show them as large as possible without distortion. The Justification function fits your photos exactly to the size of the reserved space. This could distort the photos so you would normally only use this if your photos are very close to the required dimensions.

Colors and Backgrounds

You can change the color of any text and the background (shading) of any field. You can also add borders to any field. Click the field you want to change to make it the Active Cell and then click the Cell Borders or Color / Shading boxes. You can change the color of the Borders as well but not for individual fields. All Field / Cell Borders will be the same color. In CleverCat, the color White is actually transparent when printed. If you need to create a field with a white background, use the Custom Color option to create a color just slightly off-white.

On the Detail Table Formatting form, there are some additional buttons for formatting Table Rows. Click the Header or Detail buttons to see what Color Attributes can be changed. For example, if you click the Detail Button beside Boxes / Rows, the Color text will be grayed-out to indicate that you can only set a Background Shade. If you click the Detail Button beside Dividing Lines, the Shading text will be grayed-out to indicate that you can only select a Color, not a Background Shading.

To make long Detail Tables easier to read, click the Alternating Rows Button and then select a Shading color. To change the background color of the entire Detail Table, you will need to change the background for Alternating Rows and also click the Detail button and change the Shading color for the other rows as well.

The Sample Table below the buttons will show you the color changes you have made so the best way to use this form is to experiment with settings until you get the look you like.

Printing

Most forms in CleverCat have a Print Preview button. You can send a print job to your printer from any Print Preview but for greater control of printing options, start your print jobs from 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"/>

Printing

Preview a single category **Print** **Compact?**
Press the Escape 'Esc' key to close the preview. Print all selected categories using the options set below.

Special Forms

Preview **Print**

Select individual or multiple categories to Print or Preview using the Category Selection list. When you click the Preview button, only the first selected category in the list will be shown. When you click the Print button, all selected categories will be printed. Categories are printed in the order indicated by the T.O.C. (Table of Contents) number and each category is sent to your printer as a separate print job. The T.O.C. number does not have to be an accurate indicator of the starting page of a category but it should be unique. If you are printing multiple categories and they have the same T.O.C. number, the data could be mixed together.

There is an option beside the Print Button labelled “Compact?” This option combines all categories into a single category using the Template and other settings of the first category. Individual categories normally start printing on a new page but, because the Compact option considers all data to be part of single category, there will be no page break between them. This can save a number of pages if you have many categories that would normally end on a partial page. However, because all data is printed as a single category, it only prints using the Template of the first category. It is not possible to switch Templates mid-page.

Table of Contents and Index Page

The Table of Contents and Index Page are just Printing Templates like any other. The difference is that they draw data from all selected categories.

AutoSorting, Pages and Item Count

On the Printing Menu, the AutoSort button applies the AutoSort function to all selected categories and updates the Item and Page Columns on the Category Selection list. The AutoSort button on other forms applies the sorting to just the category displayed on that form. It would be more correct to call the Item Count in the Category Selector a record count but, for some users this will be the same thing. The Pages column indicates the number of pages in a Feature Template only. It is not possible to accurately determine how many pages are required for a Dynamic Template because so many factors affect the number of items that fit on a page.

Printing Options

Printing Options

Page Numbering Option

AutoNumber Starting from Page:

Number Categories Using TOC Number

Rebuild T.O.C. / Index After Printing

Duplex Printing? Yes No

First Page Prints On: Left Right Category Option

Date or Optional Footer Text:

Currency Symbol:

Price Markup %

Global Individual Blank

CleverCat will use the global markup/discount shown here.

Page Numbering

Most users will want to print a catalog with sequential numbering across all categories. Check the AutoNumber option to do this. If you are including other pages before your catalog data such as a Table of Contents or an Introduction page, you may want your page numbering to begin on a page other than 1. Enter the starting Page number as required.

The Starting Page number option is also useful if you are re-printing an individual category. If the category is from the middle of your catalog, you would not want it to start with page 1. You can also print categories with page numbers starting at the value recorded in the T.O.C. column.

Rebuilding the Index

The T.O.C. numbers can be entered manually or they can be calculated when the catalog is printed. For example, if you have just imported your data and not printed or previewed it, you would not know how many pages are required, especially if you are using Dynamic Templates. Therefore, you would not know which page each category started on. In this case, select the AutoNumber and Rebuild options before printing and give each category a T.O.C. number indicating the order you want them to print in. The actual number doesn't matter, it just has to be unique so you will probably just number them 1, 2, 3, and so on.

When printed, the Rebuild option updates the T.O.C. column with the actual starting page number of each category. As well, the Rebuild option updates the Page numbers for each record so that you can print an Index Page.

If you make changes within a category, it is not necessary to reprint the catalog to update the Page Index. You can simply look at a Print Preview of the one category and the Index will be updated if the Rebuild option is selected. Be sure to set the starting Page correctly in the T.O.C. column and then Preview all the way to the end of the Category. You do not have to look at every page in the Preview but the Index Number is only created when each page is calculated. Using the Navigation Controls at the bottom of the Preview Window you can skip directly to the last page and every page in between will be calculated.

Duplex Printing

The Duplex option is provided for those users who will be printing on both sides of the page and want to format their catalog so that the Page Numbers and Category Label are always on the outside, unbound, edge of the page.

The Duplex option does not instruct your printer to print on both sides of the page. This is a function of your printer and must be done using your printer's own controls. For some printers, you may have to start your print job from a Print Preview and then click the Print command on the Menu Bar to access these controls.

Every printer capable of duplexing will be different so these instructions are only a guideline. Some printers will have an option for increasing the page margin on one side of the page to allow more room for binding. If your printer does not have this option, you can increase the Page Margin on the Page Setup form (Feature Print Templates only). If printing double-sided, your first page can be on either the left or right.

If your printer is not capable of double-side printing, you can print just the even or odd pages, flip and sort them and then print the other side of the page. The easiest way to do this may be to use a PDF writer and print the catalog as a PDF first. When you later print from the PDF to your printer, there will be an option in the Print Setup for printing odd or even.

Using a PDF writer is often the only way to prepare your catalog for printing if you are sending it out to be printed in larger volumes. We recommend www.PDF995.com for an easy-to-use PDF writer that also has an option to combine the separate printing jobs of multiple categories into a single PDF document.

Optional Text

On the Category Editor form, there is also a box for Optional Text. This prints in the Page Footer on the opposite side from the Page Number. If the field on the Printing Menu is left blank, then the Optional Text on the Category Editor form will be used. If the field on the Printing Menu is filled in then it will be used as the Optional Text for all categories.

Currency Symbol

If this field is left blank, then your computer's Regional Settings will be used to determine the currency symbol. If you need to print a catalog for a different market, you can change this symbol as required.

Markup / Discount

On the Category Editor form, each category can have an individual Markup / Discount Value. This adjusts the printed prices without affecting the recorded data. This is useful if you are printing catalogs for different markets. You can also enter a Global value here that will adjust prices for all categories. If you need to print a catalog without pricing, select the Blank option.

Configuration Form

Company Banner/Logo

The Banner File you select here is displayed at the top of each form and is also the Company Banner which prints in the Page Header if you select that option.

Bar Code Style

CleverCat does not print Bar Codes on its own. Instead, you can install a Bar Code font and select that as the Text Font on the Formatting form. To be readable, Bar Codes typically add special characters called Start and Stop bits. You can add these manually to the text to be printed as a Bar Code or, using the software from www.elfring.com, these extra characters can be generated automatically.

If you purchase a license from elfring.com and install one of the Bar Code styles listed in the drop-down box, CleverCat will be able to automatically add the extra characters at print time.

HTML Files

Output and Image Folders

The Output folder is the folder on your local hard drive where the HTML files will be created. The Image folder is the name of the folder on your webserver where image files are stored. When creating HTML files, both these folder names are used.

For example, on a typical webserver, the HTML files might be stored in the /Public folder. Under this folder there is typically a subfolder for image files. If this folder were named "Photos", you would enter just "Photos", without the quotation marks, in the Webserver Image Folder box. When your HTML files are viewed on your website, the HTML code will look for your photos in the /Public/Photos folder.

You can preview your HTML files on your local computer if you select the "Copy Images" option. The folder you specify as the Image Folder will be created on your local hard drive as a subfolder of the Output folder.

For example, if your local output folder is "C:\myCatalog", the HTML files will be created there and a subfolder named "Photos" would be created and your image files copied there. This allows you to click on any HTML file in the output folder to preview how it will look on the website.

This is also the easiest way to create a catalog on CD-ROM. You need only copy the contents of the Output folder as well as the Image subfolder to the CD-ROM to complete the Catalog Content portion of the CD-ROM

CleverCat can be used as a Content Manager and does not create a complete website. View the examples on www.CleverCatalogs.com/web_samples.html to see how the catalog content is displayed in an inline frame. You will need to create an "Index" or "Home" page for your website or CD-ROM. CleverCat handles the navigation within a category but your Index Page should include the navigation instructions for the categories.

Here is the code from the sample page which creates the inline frame:

```
<td width="670"><iframe src="WebSample11.htm" name="catContent"></td>
```

This is not the complete code. For clarity, the instructions setting colors, borders, etc. have been removed. What this code does is to create a cell which is 670 pixels wide, creates an iframe within the cell which contains the file "WebSample11.htm" and gives the frame the name, "catContent".

On the Configuration form, there is a "Frame Width" setting. You can make this setting the same as the width of the cell which contains the frame but, depending on font size and other factors, some words in a paragraph may not "wrap" onto the next line as expected and this could cause the cell to expand slightly. It may be necessary to make the frame slightly narrower than the cell to compensate for this.

Also on the sample page, you will see a series of similar instructions for category navigation:

```
<tr><th><a href="WebSample21.htm" target="catContent">Sample 2</a></th></tr>
```

Your own formatting may differ considerably from this example but the important part of this instructions is that the link to "WebSample21.htm" created by the "a href" statement points to a target of "catContent". This is the name of the inline frame created by the earlier "iframe" statement. In this way, each link updates the Inline Frame to display the first page of the selected category.

Shopping Cart

CleverCat can insert, into the HTML files, the instructions required for a PayPal compatible shopping cart. Visit www.CleverCatalogs.com/web_samples.html to see how cart buttons or quantity input fields are used.

Select either an image file to be used as a cart button or set the maximum number of digits to be used as a quantity input field. The more digits you allow, the wider the input field will be.

The cart button or input field can only be displayed in a Detail Table. If your printing template does not use a Detail Table, you can create a second template which does and use it as the HTML template. On the Category Editor form, you can select different templates for HTML and printing.

Part No.	Medium Desc.	Price
Part No.	Medium Desc.	Price
Notes		

Description	Description	-	-
SKU	SKU	-	-
Cost	Cost	-	-
Long Desc.	Long Desc.	-	-
Manufacturer	Manufacturer	-	-
BarCode	BarCode	-	-
-	-	-	-

In the example above, the Detail Table has been created with three fields. The PayPal cart allows two description fields, "Item" and "Option", and the first data field is always used as the PayPal "Item" even if it is not included in the Detail Table. The second field to be sent to PayPal as the item "Option" is always the left-most column in the Detail Table. The field sent to PayPal as the Item Price is always the right-most column.

In this example, the first data field is called "Description" and is not included in the Detail Table. The left-most column is the "Part No." column and the right-most is "Price". The "Medium Description" column will be displayed in the HTML Detail Table but the only data which will be sent to PayPal when the button is clicked is Description, Part No. and Price. The Label "Part No." is also sent to the PayPal cart as part of the Option field.

The order in which fields are mapped for import is not important for Template Design but, as shown here, you should make sure that the primary product description is the first field in the map if you are using the PayPal cart.

A Detail Table for the purpose of a Cart Button can be created using just one field selection – the field which contains the product price. If your data is "flat", organized in a way that does not require a Detail Table, this may be the best method to create a cart button. If the Detail Table contains only one field, it is assumed to be the Item Price. When placing the Detail Table in the Template, you would simply size and place it where you want the Cart Button to appear.

PayPal Options

To use the Shopping Cart and PayPal options you will first need to setup a PayPal account. Remember, never give out your PayPal account password to anyone. If you contact us for support relating to the PayPal shopping cart, we may ask you to send us the HTML files which you intend to post on your website but we will never ask for, nor require, your password or other account information.

The Business name field is the e-mail address you use for receiving PayPal payments. The abbreviation for the Currency field should match the currency you display in the HTML files. This does not have to be your Primary Currency as specified in your PayPal account but check your account profile to be sure you are able to receive payments in the selected currency.

The remaining fields are optional but recommended. You can get more information on these settings from the Merchant Services section at PayPal.com.

HTML Tags

It is possible to include HTML tags in the catalog text. This would be useful if you wanted to create a page link from within the text or change an attribute of a specific word. However, you would probably not want these links to be printed on your paper or PDF catalogs. If the “Remove HTML Tags” option is selected, CleverCat will examine all the text at print time. Depending on the size of your catalog and the amount of text, this could take quite a while. If you do not have HTML tags in your data, leave this box unchecked.

Automatically Created Tags

You should be able to insert almost any valid HTML formatting tag into your text. CleverCat automatically adds a few of its own.

If your text contains Carriage Returns, where you have pressed the enter key to force the text to continue on the next line, CleverCat will add a
 tag. Without
 tags, your text would “wrap” within the cell.

Printed templates can have two photos. HTML templates cannot but the 2nd Photo field can be used to create a link from the first photo. As described on page 15, HTML Templates, CleverCat can automatically create links between two sets of related HTML files. If this option is not selected, CleverCat automatically creates a link which will display the product photo at its native size.

You can over-ride this default behaviour by entering your own link in the 2nd Photo field. This can be a link to another website, another HTML page, a different photo or even a PDF file. There are a few rules that will be observed.

By default, if you enter the name of a photo, the link is created to point to the default image folder as specified by the Image Folder setting (page 29). The default for any other filename is for the link to point to the file in the same folder as its parent HTML file. If you want the link to point to a different folder, you need to include that as part of the text.

For example, consider the website myDomain.com with catalog files stored in a folder named “myCatalog”. In this case, the first page of the catalog might be found at myDomain.com/myCatalog/myProducts1.htm. The image files on this server are stored in the folder: myDomain.com/myCatalog/myPhotos

The following table describes where the files for different links must be located.

2 nd Photo Text	File is stored:
Photo2.jpg	myDomain.com/myCatalog/myPhotos/Photo2.jpg
Specials.pdf	myDomain.com/myCatalog/Specials.pdf
OrderForm.htm	myDomain.com/myCatalog/OrderForm.htm
../OrderForm.htm	myDomain.com/OrderForm.htm
../..../OrderForm.htm	Not valid in this example but multiple “../” can be used
../myOrders/OrderForm.htm	myDomain.com/myOrders/OrderForm.htm
http://www.clevercatalogs.com	“http://” must be used to point to a different website.
Field is blank	myDomain.com/myCatalog/myPhotos/(photo1).jpg

You can create your own links in any text field. For example, to create a text field containing a link in the middle of a sentence such as “Click **Here** for today’s specials”, your text field would contain:

Click Here for today’s specials.

“Title Text” is another column in the Data View table. If you want some descriptive text to be displayed when the user moves their mouse over the product image, enter it in this column.

Troubleshooting and Support

Technical support for CleverCat is available by e-mail. Our office hours are 8:30am to 4:30pm Pacific Standard Time.

If you see an error message screen in CleverCat, you can take a screenshot of this by pressing and holding down the Alt key and then pressing the Print Screen (Prt Sc on some keyboards) keys. This will copy an image of the current window into memory. In your e-mail program, you can paste this image into the body of your message by pressing the Ctrl+V keys or Paste from the Menu Bar.

Sending a screenshot of the error message is not necessary but will help us identify the problem very quickly. Please include a description of what you were doing when the error occurred.

Memory Errors

When CleverCat creates a Print Preview, it must load all the photos on a page into memory at the same time. It must also load some information about all the other pages in a category at the same time. If your category has hundreds of items, this can be a significant drain on your computer's resources. Print Previews from the Design Forms are limited to just the first page of items but repeated Previews could use up your system's memory and cause slowdowns or crashes. Try to limit the number of Print Previews you look at while designing templates.

Grid and Dynamic Templates use much less memory than Feature Templates. If your data can be displayed equally well with a Grid or Dynamic Template, we recommend that you choose this option.

The biggest cause of memory errors relates to the size of the photo itself. Photos directly out a digital camera can be anywhere from 800Kb to 5,000Kb or even larger on newer high-resolution cameras. In contrast, the photos you see on many websites are only 10Kb or 20Kb.

For printing, photos need to be a higher resolution than the 72dpi used on webpages. Photos in the range of 20Kb to 100Kb usually provide very good print quality without placing a drain on system resources.

There are many different utilities available online for reformatting photos and we recommend Omniformat from www.omniformat.com as a utility which can quickly resize an entire folder of images.

Importing Errors

The most common cause of problems in importing results from improper formatting in the original spreadsheet. Depending on the version of Excel, CleverCat may not be able to import data from a spreadsheet containing formulas. If your data contains values determined by formulas, you can copy those values and use the Paste Special function to paste just the values into new cells or columns.

In general, all numbers, prices and other values should be formatted as text before importing.

Send your questions or comments to: support@clevercatalogs.com