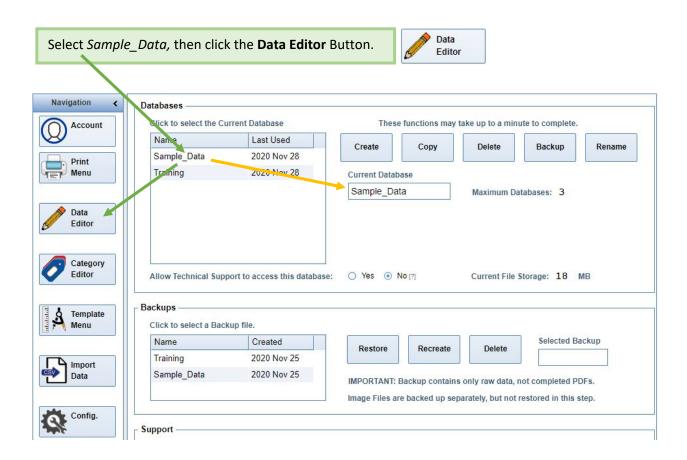
CleverCat Online

Read Me First

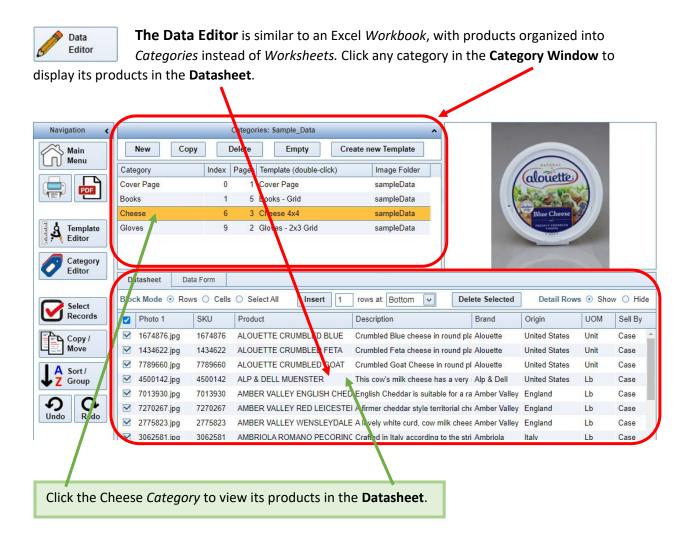
This manual is written in a special way. Step-by-step instructions are provided in the Green boxes, like this one. You can read the rest of the information on the page if you like, but you only need to follow along with these steps to produce a basic catalog.

The Main Menu

The Main Menu is the application's switchboard. From here, select which database you want to work with by clicking its name in the list. The **Data Editor** is the most common starting point as most of the application's features can be accessed from there.



TIPS are shown in Gray. For example, CleverCat remembers the last Database you used, so you don't have to select it each time, just click the **Data Editor** button.



Editing Data in the Datasheet

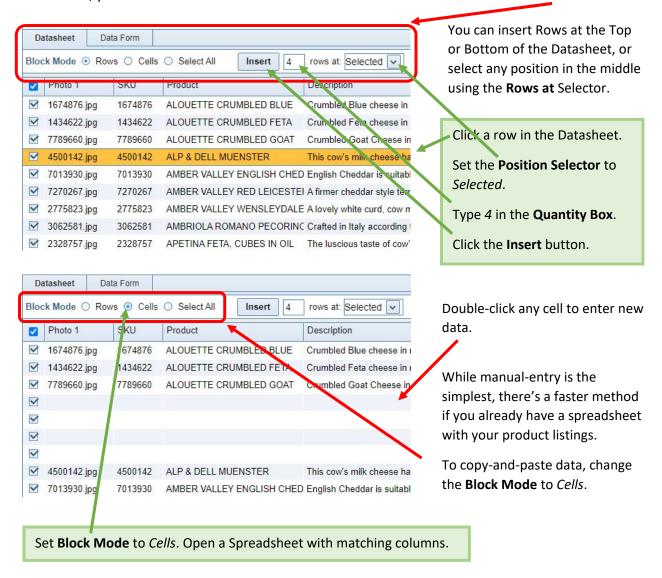
The Datasheet is the online equivalent of an Excel Spreadsheet. Edit any cell by double-clicking it, or copy-and-paste data between cells or to and from a spreadsheet on your local computer. There are several different Text Editors that may open when you edit a cell, depending on its Type.



Double-click the *Description* cell to open the **Multi-Line Text Editor.** Click anywhere outside the cell to close the Text Editor and save your changes.

Adding Data to the Datasheet

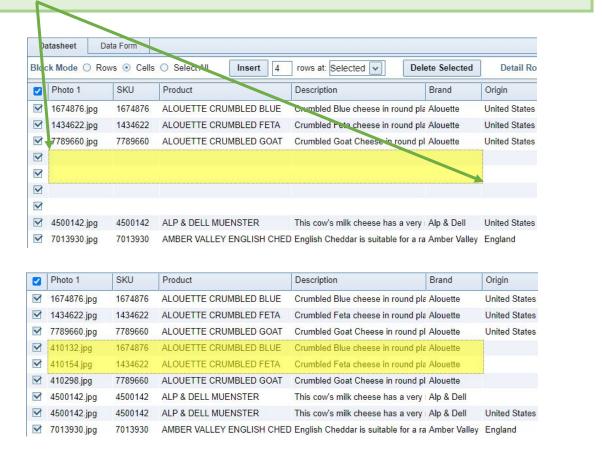
There are three methods for adding data. The first, and simplest, is to type it into the cell. Before you can do that, you'll need to create some blank rows. Use the **Insert** function in the **Datasheet Header**.



You can copy any number of cells from a Spreadsheet on your computer into the online Datasheet, but you'll first want to organize the columns so they match up with those in the Datasheet.



Drag your mouse over a block of cells in the Datasheet to highlight them in Yellow. Press Ctrl+V.



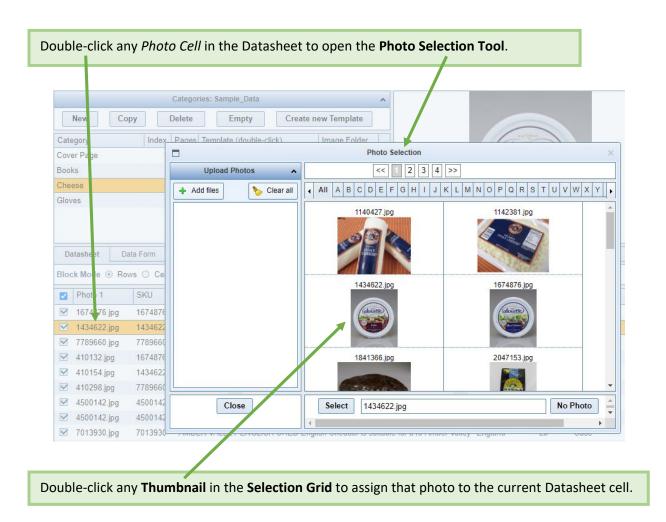
IMPORTANT: Note that only two Rows were highlighted in the Datasheet, but four were pasted. This method will always paste the entire Clipboard, and could result in data loss if there are not enough blank rows.

The same copy-and-paste method can be used within the Datasheet, or to copy Rows from the Datasheet to a Spreadsheet on your local computer.

This method has been tested with thousands of rows in different browsers, but your results could vary depending on your Operating System, Browser, and Internet Connection. Expect the process to take 10 to 20 seconds for every hundred rows. Your browser may appear to be frozen while the transfer is in progress. Do not close the browser until all rows have been copied.

IMPORTANT: This method will not work for data which contains carriage returns. Use the **Import Data from a CSV** method if your text contains multiple lines within a cell.

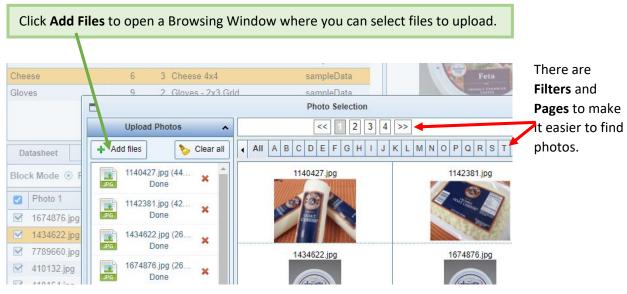
At this stage, you'll want to add photos. If the names of the photos were included in the data you pasted into the Datasheet, then all you need to do is upload the files and they'll be automatically linked. If not, there is a manual method in the **Photo Selection Tool**.



If you know the name of the file, you can type that instead and click the **Select** button. Change the size of the Selection Grid on the **Configuration** form off the Main Menu.



The Photo Selection Tool is also where you'll upload image files to CleverCat's server. You can upload hundreds of files at once. Thumbnails will be created automatically and added to the grid.

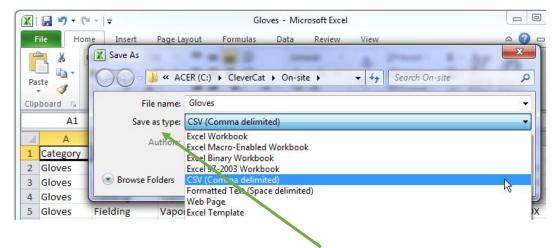


Import Data from a CSV File

Return to the Main Menu and click the Import Data Button.

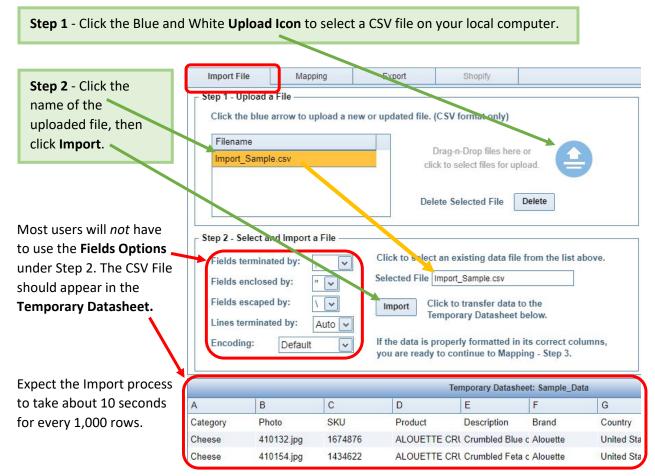


The final method of adding data requires more setup but is the best option when there are thousands of records, or if the data contains carriage returns. This method only works with a CSV file.

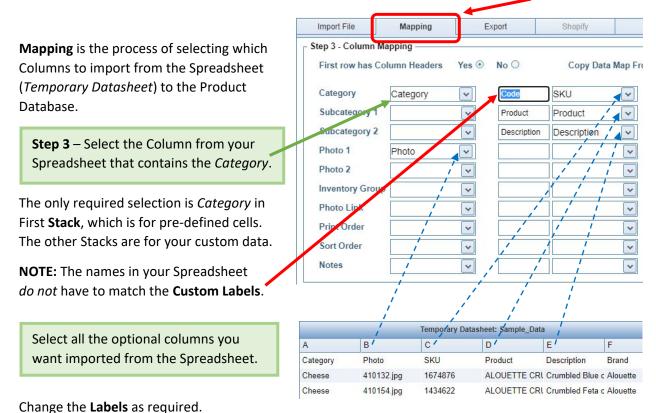


With Excel, choose **Save As** from the File Menu, and select *CSV* (Comma delimited) as the Type.

The procedure for Uploading and Importing a CSV file is divided into four steps.



If your CSV file shows up in the Temporary Datasheet, continue to **Step 3** on the **Mapping Tab**.



The columns you select for the **Map** do not have to be in the same order as they appear in the spreadsheet, and importing them does not mean they have to be printed. For example, many users import a column which contains the *Cost* of the products, but never print that data.

After creating the Map, you're ready to copy the data from the Temporary Datasheet to your Product Database. There are options for using a CSV file later to update your data, but for the first time, use the Append function.



This process will take approximately 10 seconds for every 1,000 rows, and will report the number of Records imported and Categories created.

If the imported data includes the names of the Image Files, they will be automatically linked when those files are uploaded.

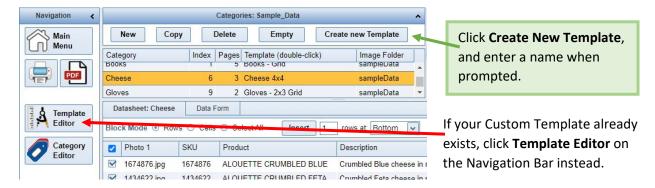
The next step is to create a Template.

Create a Printing Template

Return to the Main Menu and click Data Editor.

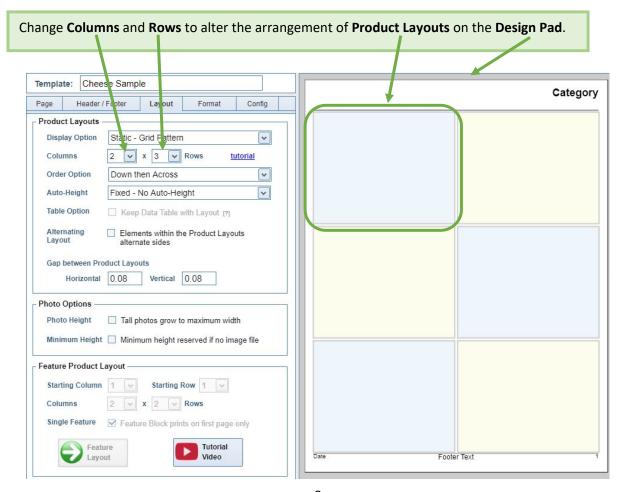


When you create a new Category, either by importing or using the **New** button in the Category Window Header, a default Template will be assigned. However, you'll want to create your own *Custom Template*.

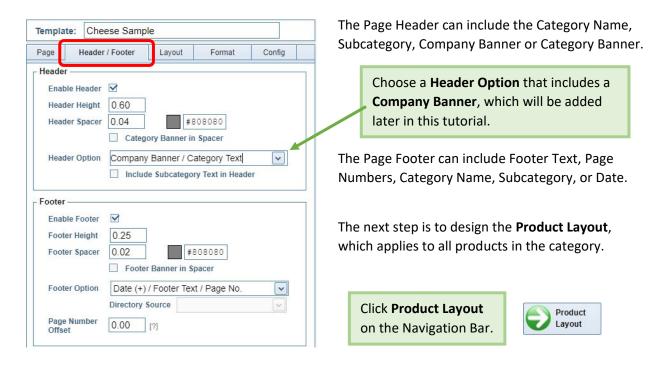


The Page Setup Form

The Template Designer is made up of several different forms. The first is **Page Setup**, where you define the general appearance of the page—number of **Product Layouts**, **Headers**, **Footers**, and so on.

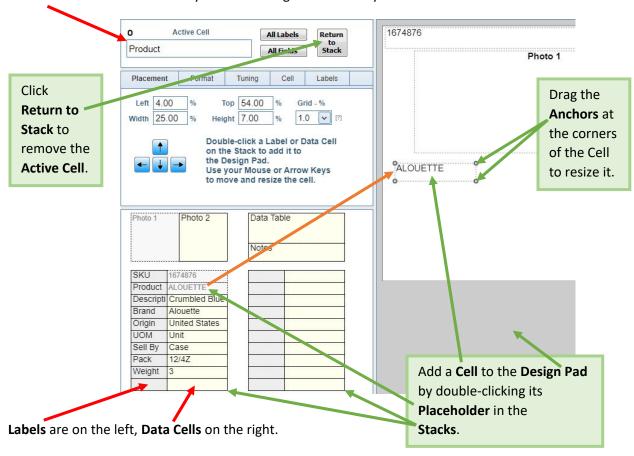


Headers and Footers

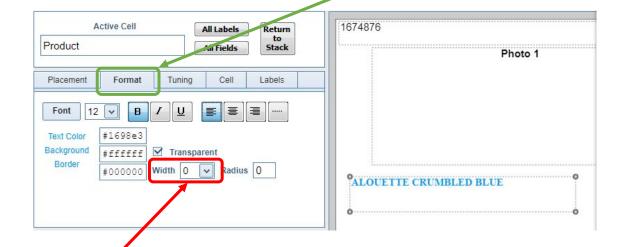


Product Layout

Active Cell indicates which cell you are working with. Click any Cell or Placeholder to make it Active.

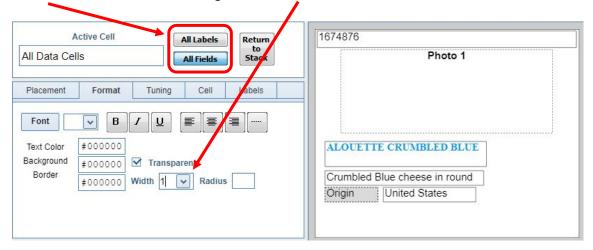


Click any Cell on the Design Pad and use the controls on the Format tab to style the text.



TIP: Put a **Border** around the cells to make it easier to size and place them.

Click All Fields or All Labels, then change the Border Width.





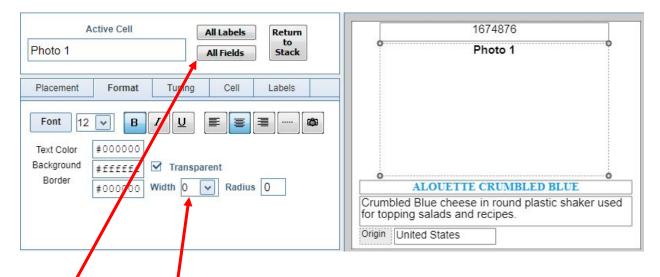
The cell borders allow us to see at a glance that some cells must be resized.

Product is too narrow, forcing text to a second line.

Description is too short, cutting off the text.



Resize cells as required. In this example, changing the heights of the cells to just what is required for the text, creates much more space for the photo, which has been made much larger.



Remember to remove the Cell Borders: Click **All Fields**, then set the **Width** to *0*.

Continue resizing and formatting cells until the Desired look has been achieved.

NOTE: When printing from a Design-related page, only one full page plus one item on the second page will be printed. To print an entire category, print from the **Data Editor** or **Printing Menu**.

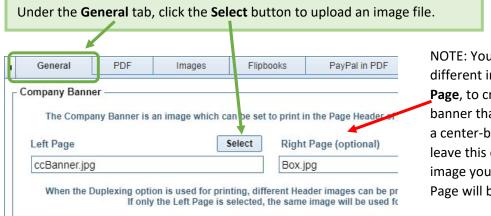


Photos automatically fill the available space. In this example, the photo on the left closely matches the shape of the space created for it, and nearly fills the rectangle. The one on the right is tall and narrow, and is constrained by it's height, leaving much white space on the sides.





Earlier, you selected a **Header Option** that included Company Banner, which prints in the Page Header of every category. This is different from a Category Banner, which can be different for each category.



NOTE: You can choose a different image for the **Right Page**, to create the effect of a banner that spans both pages of a center-bound book. If you leave this option blank, the image you select for the Left Page will be printed on both.

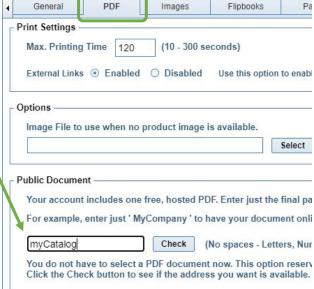


In this example, the Banner is printing on the left side of the Header, but if you print in Duplex mode, the Banner and Category Label can switch sides so that one is always on the outside or inside of a center-bound book.



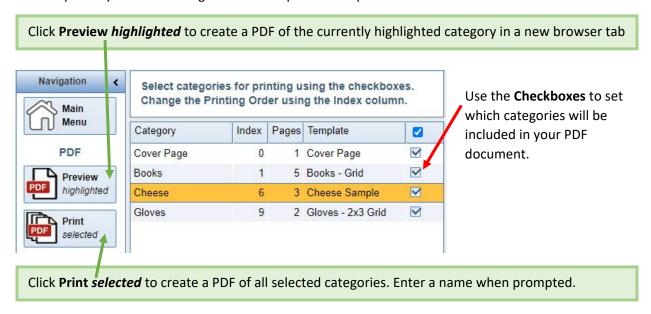
Enter a name in the Public Document field

on the PDF tab.

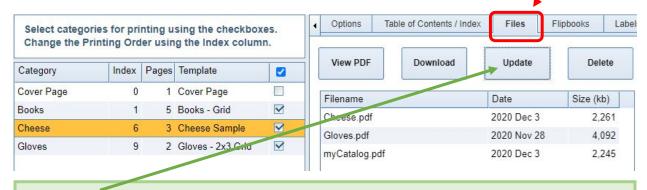


Printing a Catalog

The **Category List** shows all your product categories, along with the Template assigned to them. Change the Template by double-clicking its name to open the drop-down selector.



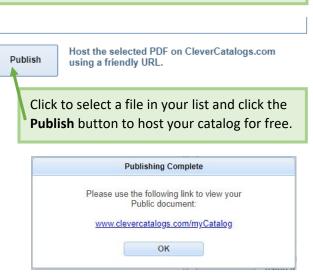
PDF Documents created using the **Print** button are queued and eventually appear on the **Files** tab. It typically takes less than 10 seconds to create a file, but larger files may take longer.



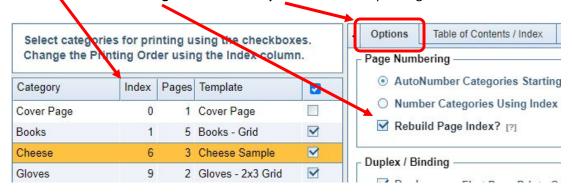
Click **Update** on the **Files** tab to see if your document has finished printing.

The documents you create are in a private Folder that cannot be accessed without logging in to the application. If you entered a **Public Document** name on the Configuration page, you can Publish one of your catalogs to a public folder using a shortened link. The link will never change, regardless of which file you Publish.

After clicking **Publish**, the Public Link will be displayed. Click it to open the catalog, or copy the link to share with your customers.



Page Numbers (Index) and Page Count may not be correct until after you have printed your catalog for the first time. Check Rebuild Page Index on the Options tab before printing.

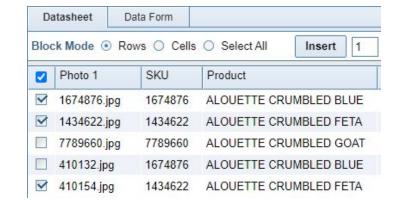


To change the printing order of your columns, simply drag-and-drop any row to a new position, then click the click the Renumber Index button on the Navigation Bar.



Similar to the checkboxes that select which category to print, there are Checkboxes in the Datasheet to select the rows that will be included in the Category.

Return to the **Data Editor** to make those selections.



That's all you need to know to create a basic catalog. The application has many more features: Data Tables, Barcodes, Filters, Copying, Sorting, Searching, Customized Data-entry Form, Duplexing, Flipbooks, Labels, Table of Contents, Index Page, and more.

The last, and possibly most important thing you need to know, is that we can assist you with almost any aspect of creating your catalog. With your permission, we can login to your account and create templates for you, or provide remote-desktop training where we work together, sharing control of mouse and keyboard, to guide you through the application.