Quick Start Guide

If you are not already at the application's Main Menu, please sign in to your account and select Clever Catalogs from the *Available Resources* section on the Dashboard.

Creating a New Database

The very first step towards your first catalog is to create a new Database. Simply click the Create button under the Database section and enter a name for your new data file. Optionally, if you loaded the Sample Database on your first use of the application, you can follow along with that.

Before we add data, there is one step which almost every user will have to complete at some point. Most product catalogs will have a Company Logo printed somewhere. You can change this logo at any time but as we are still on the Main Menu, this is a convenient time to do this. Click the Config button to open the Configuration form.

The Configuration Form

On this form, you can change a number of settings which affect how the application works. Under the Company Banner section, click the Select button above the Left Page field.

The Image Selection form displays a thumbnail view of all the image files currently stored on the server. If the image file you want to use is shown, simply double-click it to select it.

Click the Add Files button to select and upload new image files. The application can use png, jpg, jpeg, gif and bmp formatted files. Transparent png files are also supported.

Note that there is both a Left Page and an optional Right Page field. If only the Left Page is selected, this image file will be printed in the Page Header of both left and right pages. The optional Right Page image can be used so that two separate images span the width of two center-bound pages, forming a single image.

You can change some of the Regional Settings now if they apply to you and then click the Main Menu button to continue.

The Data Import Form

You can enter product data manually, just as you would in a spreadsheet, but if you will be importing a large amount of data from a CSV file, click the Data Import button to begin.

> **NOTE:** If you have any difficulty with importing your data, you can send us a copy of your CSV file and we will either import it for you or test it and let you know if changes are required. There is no charge for this service.
>
> If you need to learn how to create a CSV file from a spreadsheet, read Appendix A, *CSV Files*.

Step 1 – Upload the CSV file

Click the Upload Icon to select a file from your computer. If the file is uploaded successfully, its name will be displayed in the Filename selection box. You can store many CSV files if you need to. Click the name of any file in the list to have its name show up in the Selected File field under Step 2.

Step 2 – Process the CSV file

Most users will not need to make any changes to the Import Parameters, so just click the Import button next to *Selected File*. If the CSV file is processed correctly, your data will be imported and should appear in the *Temporary Database* window at the bottom of the form. This may take only a few seconds or more than a minute, if you have a very large file.

> **NOTE:** Stored CSV files do not directly affect your Product Database. They must be processed under Step 2 and then imported under Step 4. This means that if you upload a new copy of the CSV file, it does not automatically update your Product Database. You can safely delete stored CSV files at any time.

If your data is displayed correctly in the *Temporary Database* window, you can click the *Mapping* tab at the top of the form to continue to Step 3.

Step 3 – Mapping

Data Mapping is the process of selecting which of the columns from your CSV file you want to import into the Product Database.

The Column Mapping section has three stacks of Column Selectors.

In the first stack, the only required selection is *Category*. Select a column from the CSV which will be used to group the data into categories. If any row in the CSV does not have data in the column selected as the *Category*, that row will not be added to the database.

If your CSV has the names of your product image files, you can select that column now. If not, there is a manual image file selection function on the *Data Editor* form.

Data Tables

CleverCat can automatically create Data Tables for Product Groups. To do this, it requires that there be some common text in each row of the group.

	A	B	C	D	E	F
1	Category	Image	Product	Color	Size	Price
2	Gloves	Vapor-1.jpg	NIKE VAPOR 360	White / Black	12 3/4"	359.99
3	Gloves	Vapor-1.jpg	NIKE VAPOR 360	Photo Blue / Black	12 3/4"	359.99
4	Gloves	Vapor-1.jpg	NIKE VAPOR 360	Atomic Red / Black	12 3/4"	359.99
5	Gloves	Shado-1.jpg	NIKE SHA/DO PRO	Black / Blue	12 1/2"	189.99
6	Gloves	Shado-1.jpg	NIKE SHA/DO PRO	Wolf Grey / Black	12 1/2"	189.99
7	Gloves	Shado-1.jpg	NIKE SHA/DO PRO	Wolf Grey / University	12 1/2"	189.99
8	Gloves	Edge-1.JPG	NIKE MVP EDGE	Black / White	11 1/2"	119.97
9	Gloves	Edge-1.JPG	NIKE MVP EDGE	Black / Atomic Red	11 1/2"	119.97
10	Gloves	Edge-1.JPG	NIKE MVP EDGE	Black / Volt	11 1/2"	119.97

In this spreadsheet sample, you can see that each of the Baseball Gloves is available in different colors and that each color is in its own row. However, the Image and Product is the same for each related row. Use the Inventory Group selector to choose one of these columns to group records by.

The other two stacks are for data fields, those which describe your products, and each has a customizable Label field beside it. When you select a column from the CSV, the name of the column is automatically entered in the Label field as the default value but you can change it if required. The names entered in the Label fields will show up later in the Template Designer as field identifiers and as Column Headers on the *Data Editor* form. You will be able to change these at any time later on the *Category Editor* form if you need to.

Item	Product		Long Descrip	Long Description	
Code	Code				
Option	Option				
Stock	Stock				
Each	Price				
Cost	Cost				

CleverCat is completely customizable. There are no preset fields and you are not limited to one field for description, one for price, one for color and so on. You do not have to make a selection for each of the twenty data fields and you do not have to make them in any order. Also, you do not have to print those columns which you select – many of our users will import columns which are only for internal record keeping and will never be printed, such as an inventory quantity column.

Step 4 - Append

After making all the column selections, click the Append button. CSV data, which is currently stored in the Temporary Database will be appended, or added to the end of, the product Database. The Append function will report how many records have been added. Do not click the Append button a second time as this will create duplicate records.

Click the Main Menu button and then click the *Data Editor* button to Continue.

The Data Editor Form

The Data Editor form will normally be the starting point for future sessions. From here, you can start the Template Design process, access the Category Editor, the Printing Menu, and of course, manage your data.

The form is organized into three sections. The Category Window, the Datasheet, and the Image Preview.

The Category Window

Categories					
New	Delete	Empty			
Category	Index	Pages	Template (double-click)	Image Folder	
Cover Page	0	1	Cover Page	sampleData	
Gloves	1	3	Gloves - 2x3 Grid	sampleData	
HVAC Components	4	2	HVAC Grid	sampleData	
Books	5	5	Books - Grid	sampleData	
Antiques	10	1	Antique - Dynamic 2-column	sampleData	

If you imported a CSV file, you should see the names of each category displayed in the Category Window. Click any row in the Category Window to show its records in the Datasheet. If you are working with the Sample Database, click any row in the Datasheet to see the Product Photo for that row.

The Datasheet

Datasheet

Block Mode ⊙ Rows ○ Cells ○ Select All   Insert [1] rows at: Bottom ▼   **Delete Selected**   Detail Rows ⊙ Show ○ Hide

	Print	Sub	Photo 1	Product	Description	Color	Size	Availability	Regular	Sale
☑	1	1	Vapor-1.jpg	NIKE VAPOR 360	Designed with insight from Carlos Go	White / Black	12 3/4"	Full Right / Regu	400	359.99
☑	1	2	Vapor-1.jpg	NIKE VAPOR 360	Designed with insight from Carlos Go	Medium Olive / I	12 3/4"	Full Right / Regu	400	359.99
☑	1	3	Vapor-1.jpg	NIKE VAPOR 360	Designed with insight from Carlos Go	Bright Crimson /	12 3/4"	Full Right	400	359.99
☑	1	4	Vapor-1.jpg	NIKE VAPOR 360	Designed with insight from Carlos Go	Photo Blue / Bla	12 3/4"	Full Right / Regu	400	359.99
☑	1	5	Vapor-1.jpg	NIKE VAPOR 360	Designed with insight from Carlos Go	Atomic Red / Bl:	12 3/4"	Full Right / Regu	400	359.99
☑	2	1	Shado-1.jpg	NIKE SHA/DO PRO	The handcrafted Nike Sha/Do Pro 12	Black / Blue	12 1/2"	Full Right / Regu	200	189.99
☑	2	2	Shado-1.jpg	NIKE SHA/DO PRO	The handcrafted Nike Sha/Do Pro 12	Wolf Grey / Blac	12 1/2"	Regular	200	189.99
☑	2	3	Shado-1.jpg	NIKE SHA/DO PRO	The handcrafted Nike Sha/Do Pro 12	Wolf Grey / Univ	12 1/2"	Full Right / Regu	200	189.99
☑	3	1	Edge-1.JPG	NIKE MVP EDGE	The Nike MVP Edge 11.50" Baseball	Black / White	11 1/2"	Regular	130	119.97
☑	3	2	Edge-1.JPG	NIKE MVP EDGE	The Nike MVP Edge 11.50" Baseball	Black / Atomic F	11 1/2"	Regular	130	119.97
☑	3	3	Edge-1.JPG	NIKE MVP EDGE	The Nike MVP Edge 11.50" Baseball	Black / Volt	11 1/2"	Regular	130	119.97
☑	4	1	Select-1.jpg	NIKE MVP SELECT	The Nike MVP Select 12.50" Baseba	Black / Metallic :	12 1/2"	Full Right / Regu	230	199.99

For those who will be entering data manually, the Datasheet is very similar to a spreadsheet. In fact, you can even copy-and-paste blocks of data from a spreadsheet into the Datasheet.

If you imported a CSV file which included the names of the image files, those names will already be shown in the Photo Columns but no preview will be displayed because the file has not be uploaded yet. So, for most users, the next step will be to double-click any cell in any Photo Column to open the *Image Selector*.

If you are using the Sample Database, you can double-click any thumbnail in the Image Selection Window to select that file and close the Selector.
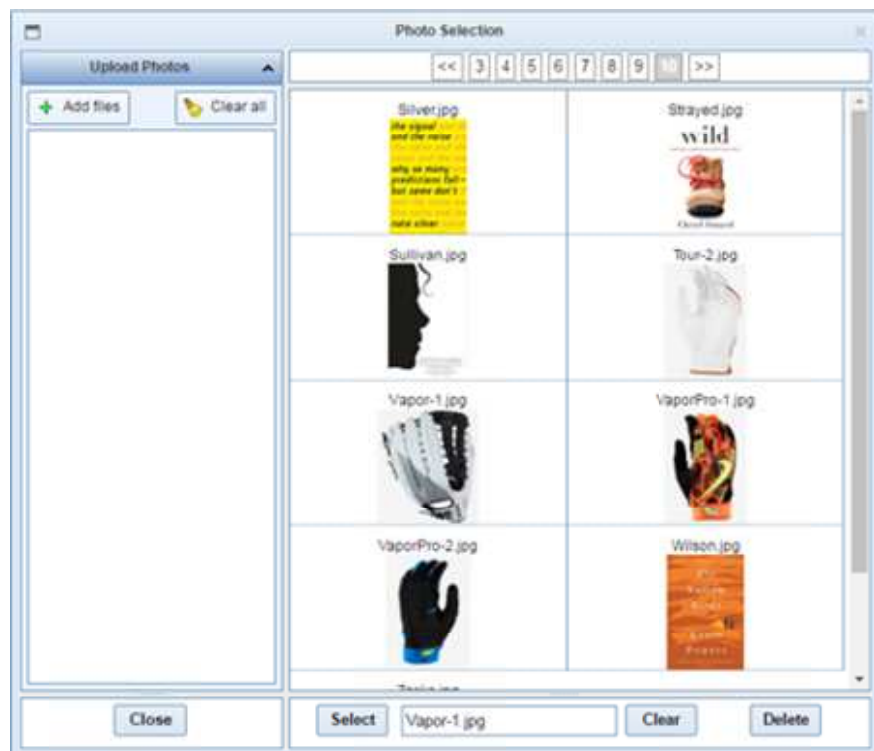
To upload new image files, click the Add Files button under the *Upload Photos* section. This will open a dialog box where you can select multiple files at once to upload to the server. The application can use png, jpg, jpeg, gif and bmp formatted files. Transparent png files are also supported.

NOTE: During the 15-day trial period, image files are limited to 256Kb. If you decide to purchase a license, the limit is raised to 512Kb and we can raise that limit upon request. However, we ask that you read Appendix B, *Product Photos*, to understand why this is not a good idea.

Spoiler: It doesn't improve print quality and it makes everything run slower.

Creating a New Category

If you will be manually entering your data, your first step on the Data Editor form will be to create a new category. Even those users who uploaded their product data may need to do this. For example, a Cover Page will be a common addition.

Click the **New** button at the top of the Category Window and enter a name when prompted. Category names should be unique. You can change these names later on the Category Editor form if you need to.

Entering Product Data

Next, add data rows to the Datasheet by entering a number in the quantity field and clicking the **Insert** button, in the Toolbar at the top of the Datasheet. For a Cover Page, you will typically add only a single row.

Blank column headers can be changed here or on the Category Editor form. Click any blank header and enter a new name. This header text can be printed as part of your template design or just used as a reference.

Your Datasheet may now look something like the one shown here.

There will be a column of checkboxes on the left side, followed by two Index columns for *Printing Order* and *Sub Order* numbers.

For most users, the *Print Order* numbers will be sequential and the *Sub Order* number should always be **1**. For Product Groups, the *Print Order* will be the same for every row in the group and the *Sub Order* number will be sequential.

These numbers can be changed manually during data entry or changed automatically later using the *Sorting / Grouping* function.

	Print	Sub	Photo 1	Author
☑	1	1	Abrams.jpg	Abrams, David
☑	2	1	Applebaum.jpg	Applebaum, Anne
☑	3	1	Boo.jpg	Boo, Katherine
☑	4	1	Cain.jpg	Cain, Susan
☑	5	1	Caro.JPG	Caro, Robert A.
☑	6	1	Coll.jpg	Coll, Steve
☑	7	1	Coplin.jpg	Coplin, Amanda
☑	8	1	Cronin.jpg	Cronin, Justin
☑	9	1	Duhigg.jpg	Duhigg, Charles
☑	10	1	Egan.jpg	Egan, Timothy
☑	11	1	Eggers.jpg	Eggers, Dave
☑	12	1	GillianFlynn.jpg	Flynn, Gillian
☑	13	1	Lynn.jpg	Fountain, Ben
☑	14	1	Green.jpg	Green, John

Data Tables

Where the data is grouped into related products and Data Tables must be created, the proper indexing is for the *Print Order* number to be the same for the entire Product Group and the *Sub Order* number to be sequential.

If the data was imported from a CSV file and the Inventory Grouping selection was used, these Index Numbers may have been created automatically. They can also be entered manually or created using the *Sorting / Grouping* function.

	Print	Sub	Photo 1	Product
☑	1	1	Vapor-1.jpg	NIKE VAPOR 360
☑	1	2	Vapor-1.jpg	NIKE VAPOR 360
☑	1	3	Vapor-1.jpg	NIKE VAPOR 360
☑	1	4	Vapor-1.jpg	NIKE VAPOR 360
☑	1	5	Vapor-1.jpg	NIKE VAPOR 360
☑	2	1	Shado-1.jpg	NIKE SHA/DO PRO
☑	2	2	Shado-1.jpg	NIKE SHA/DO PRO
☑	2	3	Shado-1.jpg	NIKE SHA/DO PRO
☑	3	1	Edge-1.JPG	NIKE MVP EDGE
☑	3	2	Edge-1.JPG	NIKE MVP EDGE
☑	3	3	Edge-1.JPG	NIKE MVP EDGE
☑	4	1	Select-1.jpg	NIKE MVP SELECT
☑	4	2	Select-1.jpg	NIKE MVP SELECT
☑	4	3	Select-1.jpg	NIKE MVP SELECT

Double-click any cell in the Datasheet to edit it. You can paste data into a cell by pressing Ctrl+V. Click anywhere outside of the cell editing window to save your changes.

There will likely be a number of empty columns in the Datasheet which you will not use. So, the next step is to click the Category Editor button to setup the Datasheet.

STARTING OVER

One of the most common things new users may need to do is re-import their data. Usually this is because they start with only a small number of records to see if CleverCat will work for them. Some users actually prefer to work entirely in Excel and then start over when it is time to update their catalog. The **Empty** button in the Category Window makes this easier.

If you use the **Delete** button to delete a category, all records in that category are also deleted. If you use the **Empty** button instead, this will delete all the records in that category but leave the category itself intact. You can then repeat the Data Import steps and Append updated data into the empty categories without having to repeat any Category setup.

The Category Editor Form

Each category can have a unique setup or all of your categories may share the same setup. There are *Copy* buttons throughout this form which copy the changes you make to the current category, to every category.

| Column Headers / Labels | Category Images | Data Sorting / Grouping | Additional Columns |
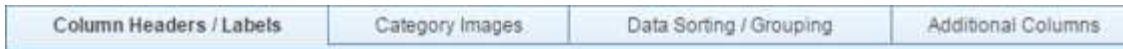
Under the *Column Headers / Labels* tab, you will see the names of the Column Headers you entered in the previous step. You can change these here as required. If you are using the Sample Database, you will notice that the *Enable* checkboxes have already been deselected for those columns which do not have a label. Enable or Disable the columns to match your own data.

You can also change the *Field Type* for each column. If you select **Number** or **Price**, data in this column will be displayed with two decimal places, even if you don't enter them. For example, enter just *123* and the data will be displayed as either *123.00* or *$ 123.00*, depending on your selection.

> **NOTE:** Change the Currency Symbol in the *Regional Settings* section of the *Configuration* form.

There are two pre-defined Photo columns but the application allows any column to be used for photos. If you select Photo as the *Type*, double-clicking any cell in that column on the Datasheet will open the *Image Selector*.

| Column Headers / Labels | Category Images | Data Sorting / Grouping | Additional Columns |
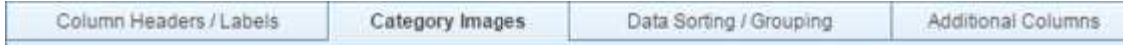
If you are using the Sample Database, you will notice that the Photo Sub-Folder has been set to *sampleData*. For users with a large number of products and images, it may be convenient to organize image files into their own folders. This is completely optional. If you create and assign a folder to a category, when you upload images from the Datasheet, those files will automatically be placed into the assigned category.

> **CAUTION:** Deleting a Sub-Folder permanently deletes all images in that folder.

| Column Headers / Labels | Category Images | Data Sorting / Grouping | Additional Columns |
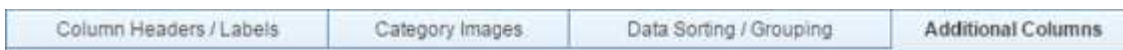
The *Enable* checkboxes on this tab controls the visibility of the pre-defined columns. Change these as appropriate for your own data.

The *Print Order* number controls the printing order of items within a category and should be unique for every row or group of rows in a Product Group. The *Sub Order* number controls the printing order within a Product Group. It is not necessary to display these columns but it may be useful to do so when first starting out. If some of your products are not printing in the expected order, you can check these columns to see that they are numbered correctly.

Return to the Data Editor form by clicking the Data Editor button. Your Datasheet should now display only those columns which you have enabled. You can further customize the Datasheet by dragging-and-dropping columns to new positions or positioning your mouse at dividing line between Column Headers and dragging the column to a new width.

Creating a Template

If you already have templates, you can assign one to any category by double-clicking the field in the Template column and selecting any template from the list.

To edit that template, just click the Template Editor button.

If the category does not have a template, when you click the Template Editor button you will be asked if you want to create a new template. If the category already has a template but you want to create a new one, double-click the Template column and select the blank line at the top of the selection list to remove the current template. Now, when you click the Template Editor button, you will be asked to create a new template and be taken to the Template Designer.

At any time during the template design process, click the *PDF* button to create a preview of your page. The PDF will open in a separate browser window. To avoid delays where the category has a large number of records, a PDF created from any of the design forms will be limited to one page, plus one product on the second page. To preview all your data, create the PDF from the Data Editor form or the Printing Menu.

The Page Setup Form

 The Template Designer is made up of three forms; *Page Setup*, *Product Layout*, and *Data Table* Editor. The Page Setup form is where you set the general look of the page. The *Sample Page* on the right side of the form reflects most of the formatting changes that can be made here.

NOTE: We can design your templates for you at no charge. Just send us some details about what you are trying to create – number of products per page, size of images, colors, borders, or anything else that is important and we can create some PDF samples for you.

Page	Header / Footer	Layout	Format	Config

On the Page tab, set the *Page Dimensions*. The most common Paper Sizes are *Letter* and *A4* but you can also choose *Custom* and enter any values you want for the Width and Height. The *16:9* and *4:3* settings represent the two most common aspect ratios of Tablets and some phones. They are the equivalent of Custom sizes of 8" x 4.5" and 8" x 6", respectively. If you know that your PDF will be viewed mostly on a tablet, these settings will use the screen area more efficiently, but they also work well when viewed in Landscape mode on a traditional desktop screen.

Page	Header / Footer	Layout	Format	Config

There are a range of options for the Page Header and Footer. If you have already uploaded a Company Banner image, that image will show in the header of the Sample Page if you choose a Header Option which includes the Company Banner.

The printed size of the image depends on the available height and width. If the image is too short, increase the Header Height. However, the image will only increase in height if there is enough width available for it. Header Options which include two elements, such as *Company Banner / Category Text*, divide the header equally. So, on an 8.5" wide page with .25" margins, the total header width is 8". With a divided Header Option, the width available for the image is only 4". If the Banner image has a width to height ratio of 4:1, increasing the height of the header beyond 1" will not increase the height of the image as it will fill the 4" width available to it.

Page	Header / Footer	Layout	Format	Config

Use the Layout tab to set how many Product Layouts will print on a page. If this is your first time using the application, select **Static – Grid Pattern**. If your product data requires tables or the descriptive text varies significantly, you may need to create a *Dynamic* template. Similar design principles apply to both but it will be easier to create a Dynamic template if you have already created a more basic Grid design.

Product Layouts

Display Option	Static - Grid Pattern
Columns	2 x 3 Rows
Order Option	Down then Across
Auto-Height	Fixed - No Auto-Height

Change the number of Columns and Rows to adjust the number of Product Layouts. If you are creating a Dynamic template, the number of Rows does not apply because this will be variable.

For now, set the Auto-Height option to **Fixed – No Auto Height**. About half of all users will need to set this to one of the options which allows fields to grow but, in the next step, the fixed height option will be used to better explain cell placement.

Page	Header / Footer	Layout	Format	Config

If you are creating a Dynamic template, set the Borders value to a number greater than zero to create a border around the Product Layouts. During the design step, this border will help you understand how fields grow and shrink to accommodate variable amounts of text.

Click the Product Layout button to continue.

The Product Layout form

This form is organized into three main sections. On the right is the *Design Pad*. If you are creating a Dynamic template, the shape of the Design Pad represents the width of the Product Layout and half of the page height. Otherwise the shape matches the shape of the Product Layouts on the *Sample Page* of the Page Setup form.

The bottom-left section contains the *Stacks* of available cells. At the top are the two *Photo Cells*, the *Data Table* cell and the *Notes* cells. The two Stacks below are the product *Data Field* cells and *Labels*. The Labels are on the left of each Stack and the Data is on the right.

Double-click any cell in the Stack to add it to the Design Pad. To remove a cell from the Design Pad, click the cell on the Design Pad, or click its empty *Placeholder* on the Stack, to make it the Active Cell, and click the *Return to Stack* button at the top of the form.

The section in the upper-left of the form contains a group of Tabs with controls for formatting individual cells. When you click any Cell in the Design Pad, or its empty Placeholder in the Stack, it becomes the *Active Cell*. Any changes you make in these Tabs apply to the selected cell.

Cells are positioned and sized in percentage values relative to the shape of the Design pad. So, a Cell which has a Left value of 50% and a Top value of 50% will have its upper-left corner in the exact middle of the Design Pad.

When you select a cell, *Anchors* appear at each corner. Reposition and resize cells by dragging these anchors or use the Arrow Keys on your keyboard. The Left, Right, Up, and Down Arrow Keys will move the cell. On your Numeric Keypad, the 4, 6, 8, and 2 Keys will resize the cells – you may have to click the Num Lock key on your keyboard to enable this function. You can also fine-tune the size and position of a cell by typing a new value into the Left, Top, Width and Height fields.

Earlier, on the Page Setup form, you should have set the Auto-Height option to **Fixed**. Here is a tip which will make designing a template easier, especially for Dynamic templates. Add all the cells you will need for your Layout onto your Design Pad, don't worry about their size and position too much. Next, click the All Labels buttons and then set the Width value to something greater than zero to add a border to every Label. Repeat this step using the All Fields button. Now, every Label and Data Cell will have a border around it.

Click the PDF button to check if the sizes you have set are appropriate for the data. If your data will require multiple lines, the **Fixed** option may be truncating the text at the current height of the cell. It is not necessary to exactly match the size of the cell to the text it contains but, if you set it fairly close, it becomes easier to visualize the spacing as you fine tune their positions on the Design Pad.

At this point, you need to make a decision about cells which contain multiple lines of text and that decision depends on the type of template you are creating. Click the Page Setup button to return to the previous form and enable the Auto-Height option if you need to.

Static – Grid Template with Fixed Cells

This is the easiest option to work with because every cell appears exactly where you place it. It also has the advantage that cells can overlap, allowing you to create special effects such as text on top of graphics. You will need to increase the height of your cells to be tall enough to fit the data for the product which has the most text, even if the text for other products will not fill the cell. This may create gaps between cells when the amount of text is variable but this is a very common layout which you will find in most product catalogs.

Static – Grid Template with Auto-Height Cells

You can still overlay cells on top of others using this option but you should make sure that the cell on top is completely within the borders of the cell below. If the borders of the two cells overlap, this will change the alignment.

The main principle behind Auto-Height is that cells respect their vertical separation. So, you will normally set the cell height to be equal to, or less than, the height of a single line. If that cell should grow for a particular product, the cell below it will be the same distance below it regardless of the number of lines.

Dynamic Template

Overlaying cells is not recommended with a Dynamic template as alignment will become unpredictable.

As above, Auto-Height causes cells to respect their vertical separation. Another principle of Dynamic template design is that you are setting the minimum heights for each element. For some designs, it is necessary to set the height of a cell to almost zero so that it effectively disappears if there is no data in it for that particular product.

After you have placed your cells, you can use the All Labels and All Fields buttons again, setting the Width value to zero to remove the borders around the cells.

Cell Types

Placement	Format	Tuning	Cell	Labels
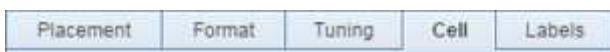
The default setting for all cells is *Text*.

If your data includes prices, you can change the Active Cell to *Number* or *Currency*. Number formats the data to 2 decimal places. A cell set to Currency formats to 2 decimal places but also adds the currency symbol defined on the Printing Menu. Additionally, cells formatted as Number or Currency are affected by the *Markup/Discount* feature on the Printing Menu. This allows you to adjust the printed values by a given percentage, or even hide all prices temporarily.

If your products require a table, click the Data Table button to continue.

The Data Table Form

Data Tables are used where a group of related products can be represented by a single photo. This form is setup to be very similar to the Product Layout form. The main difference is that the Design Pad represents only the table's *Header Row* and a single *Data Row*, regardless of how many rows will actually print. There is also a cell representing the optional *Notes* row.

Double-click any Data Cell in the Stack to add it to the Design Pad. The corresponding Label cell will be automatically added to the Header Row.

The Notes line in as optional row which can print above or below the Data Row. This cell always spans the entire width of the Data Table and you can select any column as its data source.

The best way to create a template is usually through a process of experimentation. Try different formatting options to see how they look. Once you are done creating a template, click the Print button to continue.

The Printing Menu

On this form, the *Preview* button creates a PDF of just the current category. As with other forms, this PDF will open in a separate browser window.

The *Print* button creates a single document combining all selected categories. For most catalogs, this takes only a few seconds. However, for very large or complex catalogs, this can take a few minutes so the PDF is created in the background as a file which you can later view or download.

Category Selection List

Category	Index	Pages	Template	☐
Cover Page	-2	1	Cover Page	☑
Table of Contents	-1	2	2	☑
Gloves	1	3	Gloves - 2x3 Grid	☑
HVAC Components	4	2	HVAC Grid	☑
Books	6	5	Books - Grid	☑
Antiques	11	1	Antique - Dynamic 2-(	☑
Index Page	12	1	1	☐

Change the Display Order of this list by clicking either the *Category* or *Index* column header. However, this does not change the *Printing Order*.

The number in the Index column indicates the actual Printing Order of categories. Drag-and-drop categories and then click the *Renumber Index* button to change their order, or just manually type in a new number.

It is acceptable to use zero or negative numbers in the Index column. This is because most catalogs will start numbering at the product pages and Cover Pages, Introductions, Table of Contents or other pages before the products may not be numbered. So, a Cover Page may be numbered *-3*, which will print before a Table of Contents numbered *0*, which prints before any positively numbered category.

The number in the *Pages* column may not be accurate yet. Print using the *Rebuild Page Index* option to update the page counts.

You can change the template assigned to any category by double-clicking the name in the Template column.

Use the *Master Select* checkbox at the top of the selection list to include or exclude all categories or use the individual checkboxes to select categories to be included in the document.

Normally, the *AutoNumber* option is used with a value set to the starting number of the first product category. However, some users will download the PDF created by CleverCat and use another utility to insert other PDF pages between categories. In this case, it may be necessary to set and use the number in the Index column to make sure the page numbering is correct.

The Rebuild Page Index option is used to update the Index and Page Counts for all selected categories. This option resets to *Disabled* each time you exit this form. This is because users frequently reprint individual categories and, if the Index were rebuilt for every print job, a reprint of a category in the middle of the catalog could result in an improperly numbered Index.

The *Duplex* option swaps certain elements in the Page Header and Footer. In the example below, the *Category Label* and *Page Numbers* are always on the outside edge of a center-bound book.
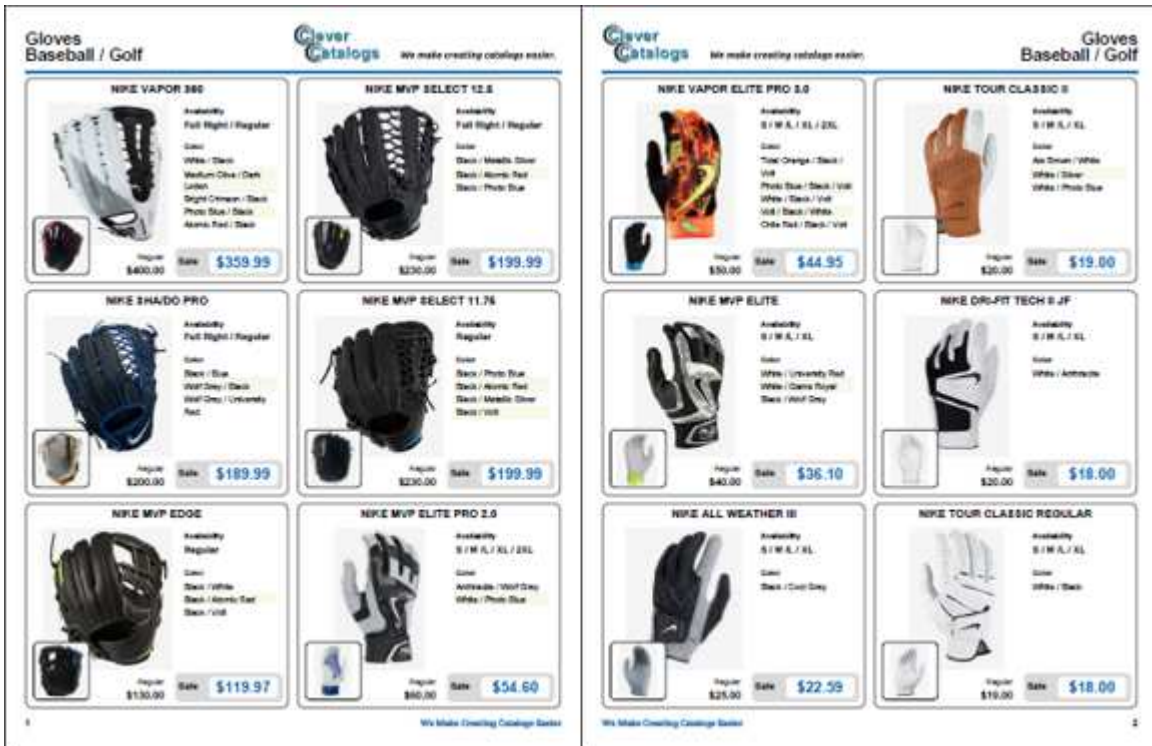
The Table of Contents and Index Pages can be created separately or, using the option at the bottom of this tab, they will show up in the Category Selection list, allowing them to be added to the single PDF document.

The Table of Contents and Index Pages can be thought of as categories just like any product category, except that they do not have their own products. Instead, they draw from every selected category. As such, they can have different templates and these can be changed, just like any other category. Click the *Editor* button to open the Category Editor form where you can change other category-specific values, such as the Footer text.
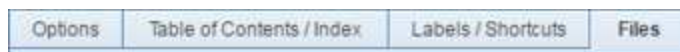
When you use the Print button to create a single PDF document, that document is created in the background, allowing you to exit this form to complete other tasks. Use the *Update* button to check if the file has been completed. Click the View PDF button to open the PDF in a separate browser window. From that window, you can then download or print the document.

Your account may have storage limits. Use the *Delete* button to remove files you no longer need.

Your account includes free hosting of a single document. On the Configuration form, select a *Friendly Name* for your publication. This is typically the name of your company. When you click the Publish button, this PDF is copied from your private document folder to a public folder and is accessible from a shortened URL.

For example, if you set the Friendly Name to **myCompany**, then the link you will provide your customers with is just: *www.clevercatalogs.com/myCompany*

Appendix A – CSV Files

CSV files are a common export format of accounting and other programs so it may be that you already have the ability to create the required file format. However, creating a CSV file from an Excel spreadsheet is very easy if that is your only option.
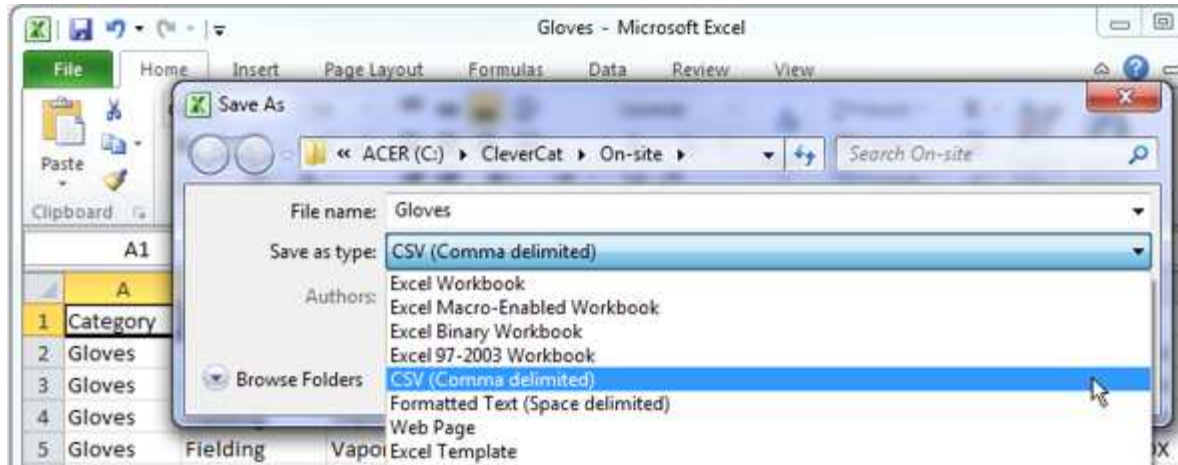
Simply use the **Save As** option and choose **CSV (Comma delimited)** as the *Save as type*.

Appendix B – Product Photos

CleverCat automatically resizes images to fit the space created for it in a layout. However, the full image data is written into the PDF file, even if the image dimensions have been reduced.

The larger the photos, the larger the final PDF document will be and the more time it will take to download and open. To improve the viewer's experience, you should reduce the size of your photos to be only as large as they need to be to show enough detail.

Image files directly from a digital camera can be 5,000kb or larger. For most users creating catalogs for viewing on screen, reducing images to 200 to 400 pixels wide at 96dpi will produce good image quality and high performance. These image files will only be in the range of 20Kb to 40Kb.

For most users who are printing paper catalogs, reducing images files to under 200Kb will produce good image quality without creating a document which is too large to email.

Most Photo-Editing software can resize your image files but there are some utilities which are made just for this purpose. This tutorial: http://www.clevercatalogs.com/tutorial/photoUtilities.html, describes the **FastStone Photo Resizer** (http://www.faststone.org/FSResizerDetail.htm) which can resize an entire folder of images in only a few clicks.