



Skyline ProductManager

Version: 7.6.0.8



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Skyline ProductManager

ProductManager is integral to all Skyline installations, providing the tools required to define paper stocks, finishing options, service levels and much more. These elements are then used to construct products and create the associated job tickets that the customer completes when they place their order. A powerful feature of ProductManager is that it enables you to create product specific job tickets. The advantage of this is that the customer is presented only with choices relevant to the product they have chosen, making the completion of the ticket a quick and simple process. When ProductManager is first used the print room options need to be configured. You need to specify the available [media](#)¹⁹, [document print production](#)²¹ options and the delivery options. You can then create the [products](#)²⁵ that are available to be ordered.



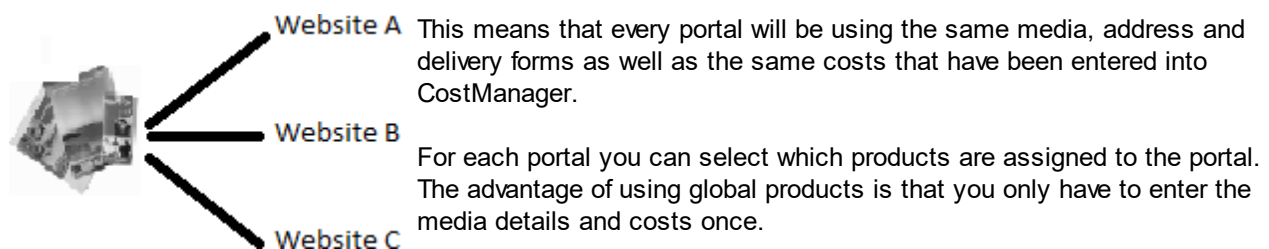
You can print a hard copy of a manual by clicking [ProductManager](#) which opens a PDF copy of the manual. You can then download or print the document.

Before you start to enter any media details, create any products, address forms or delivery forms you need to decide whether the products will be available globally or if they are assigned to a specific portal. When Skyline is installed it is configured to use global products. You require Host authorisation to sign on to CostManager when using global products.

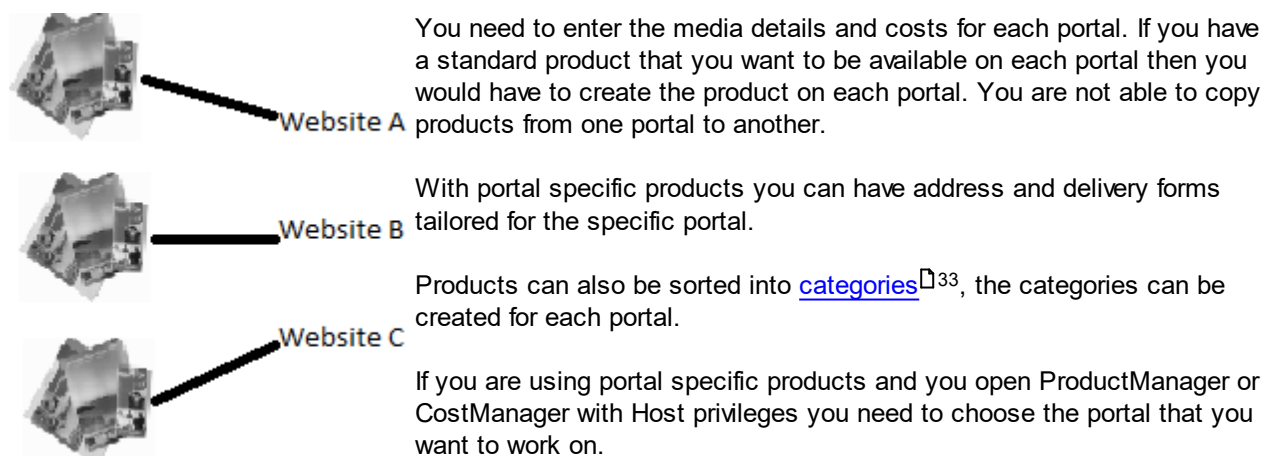


If you change from using Portal specific to Global specific products you will need to re-enter all your media paper stocks, costs before re-creating your products, address and delivery forms. The same is true if you change from using Global specific to portal specific products. Neither media details, forms or products can be copied between global or portal specific products.

Global products are available to all portals.



Portal specific products can not be shared with other portals.




To use portal specific products:

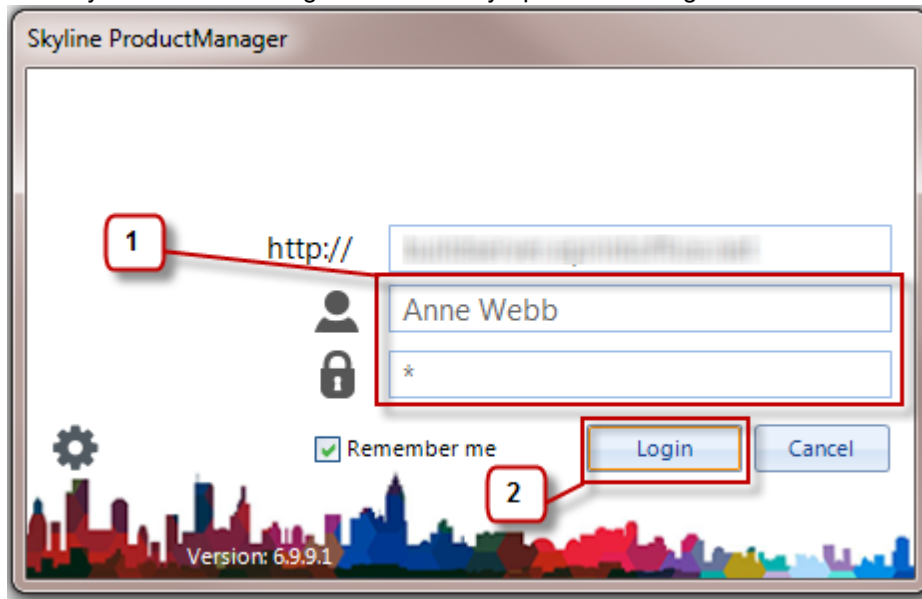
1. Log in to Skyline with Host rights and go to **Admin**.
2. In the Portals section select Default Configuration.
3. Set the **Global Products** to **False**.

Starting ProductManager

Once ProductManager has been installed on your computer you can start to create products. You will be unable to log into ProductManager unless you have the user role Manager assigned to your account. When global products are used you require Host or Administrative authorisation level to sign into ProductManager.

To open ProductManager:

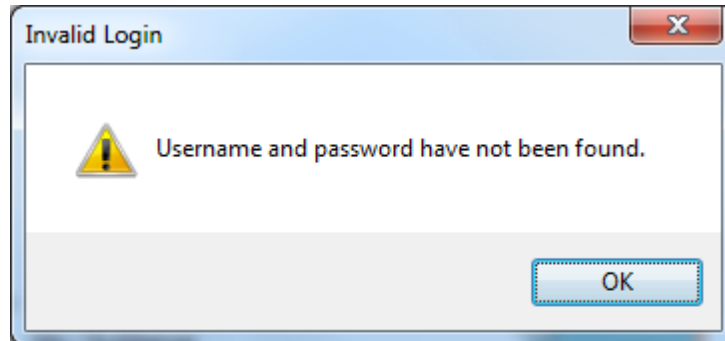
1. Click  ProductManager
2. The Skyline ProductManager automatically opens with a log in screen.



1. Use the same log in that you use to access the Skyline Portal.
2. Click **login** to start ProductManager. The [Print Room Options](#)¹⁸ window opens.

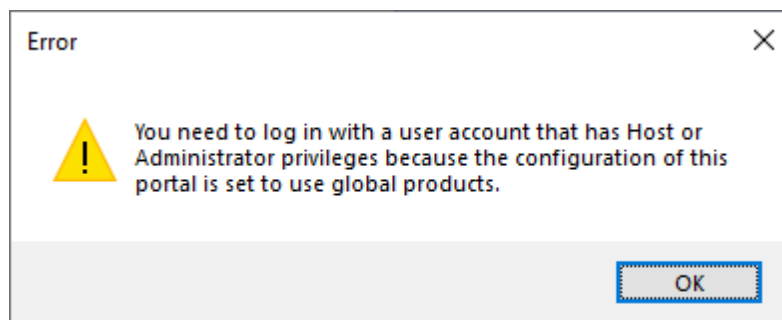
Access Not Granted

If you try to log in into ProductManager and see the message "Username and password have not been found" it means that you do not have user access to ProductManager. Please contact your Skyline administrator to request that your account details are updated.



Example of access not granted.

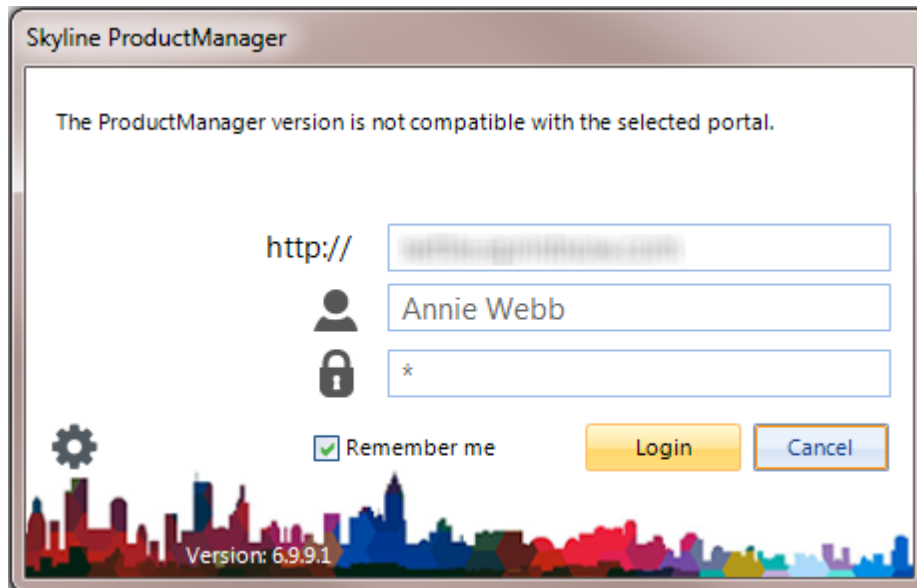
If Skyline has been configured to use Global products you require Host or Administrator privileges to open ProductManager. An error message will show if you try to open ProductManager without the correct privileges.



Example of trying to open ProductManager without the correct privileges when using global products.

Version Not Compatible

If you try to log in into ProductManager and see the message "The ProductManager version is not compatible with the selected portal" it means that a new version of ProductManager needs to be downloaded.



Make sure that if there are any previous versions of ProductManager installed that they are removed. Use the Add/Remove Programs facility in Control Panel to remove any existing version. Then download and install the current version.

Updating ProductManager

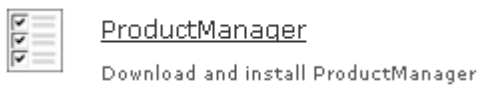
After the initial installation of ProductManager there may be an occasion that you will need to install the program again e.g. after a computer upgrade.

To update ProductManager:

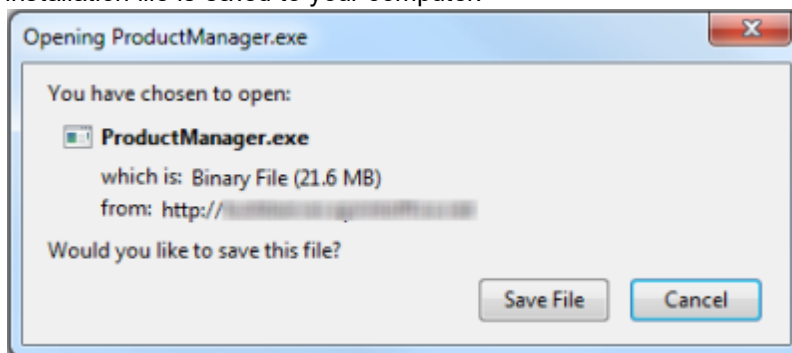
1. Make sure that if there are any previous versions of ProductManager are removed. Use the Add/Remove Programs facility in Control Panel to remove any existing version.
2. Log in with Management Permissions and go to **Downloads**.



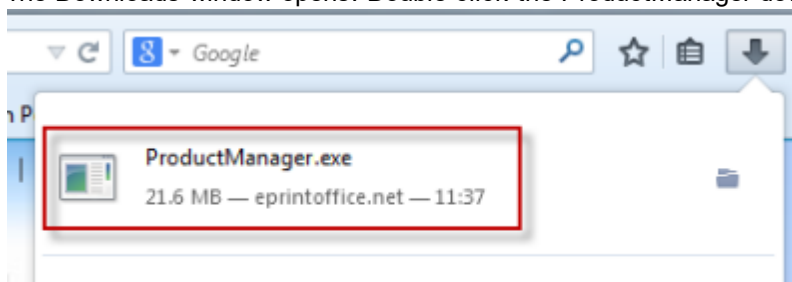
3. Click **ProductManager**.



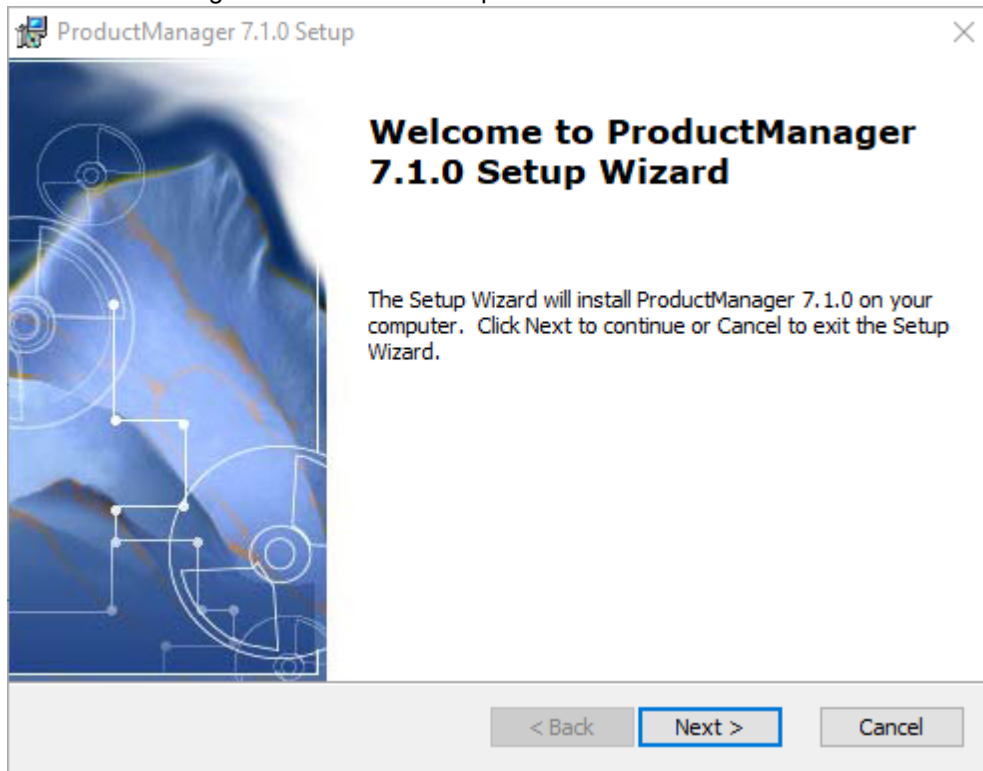
4. When you see the **Opening ProductManager** window, click **Save File**. The ProductManager installation file is saved to your computer.



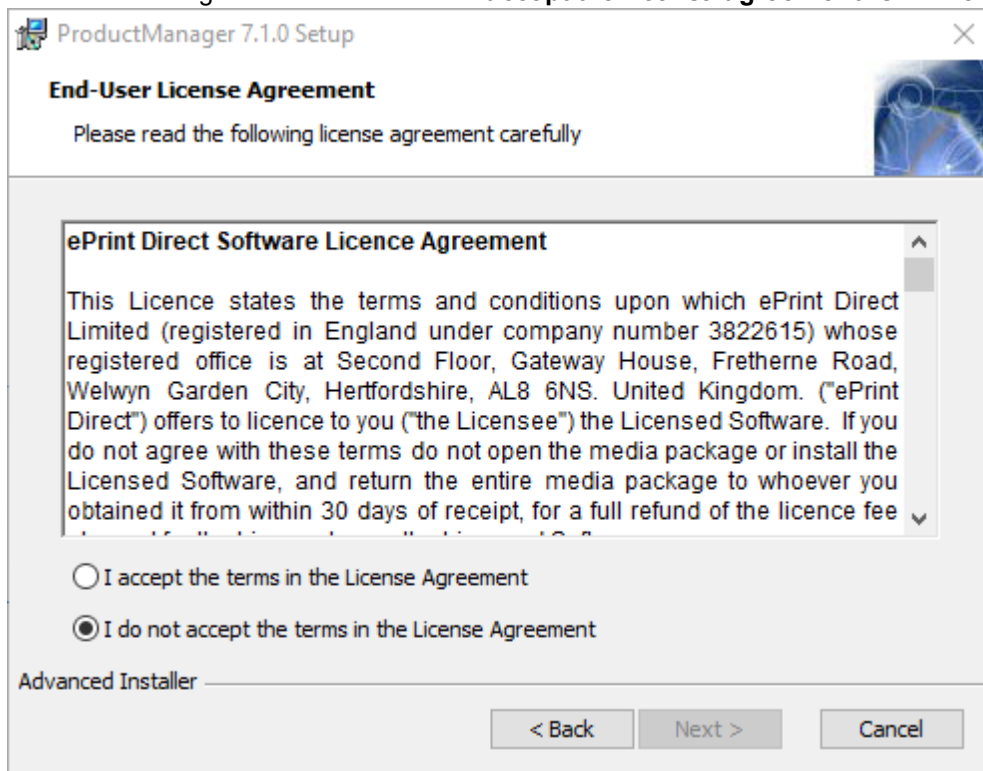
5. The Downloads window opens. Double click the ProductManager downloaded file to start the installation.



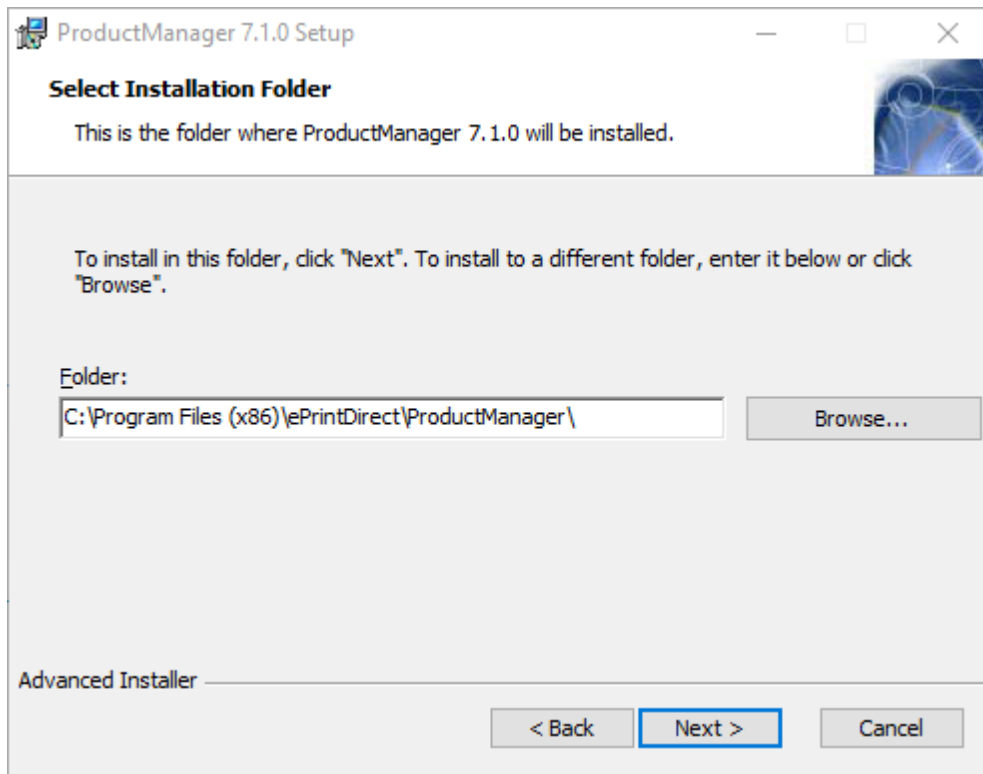
6. The ProductManager Installation wizard opens. Click **Next** to continue.



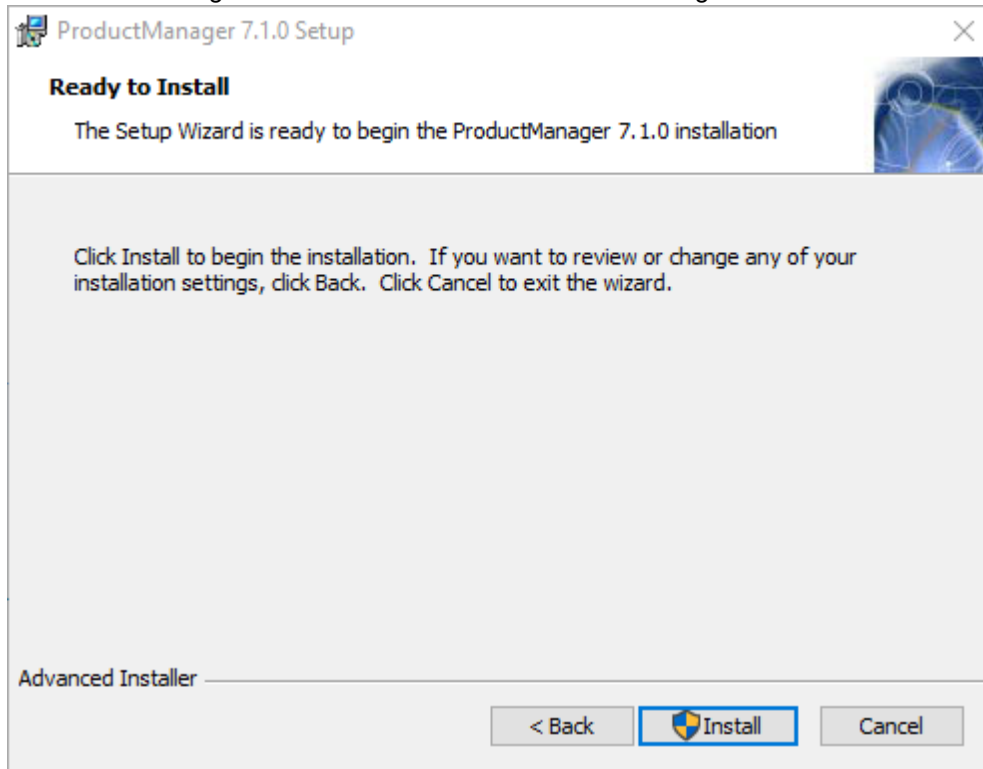
7. At the License Agreement window click **I accept the license agreement**. Click **Next** to continue.



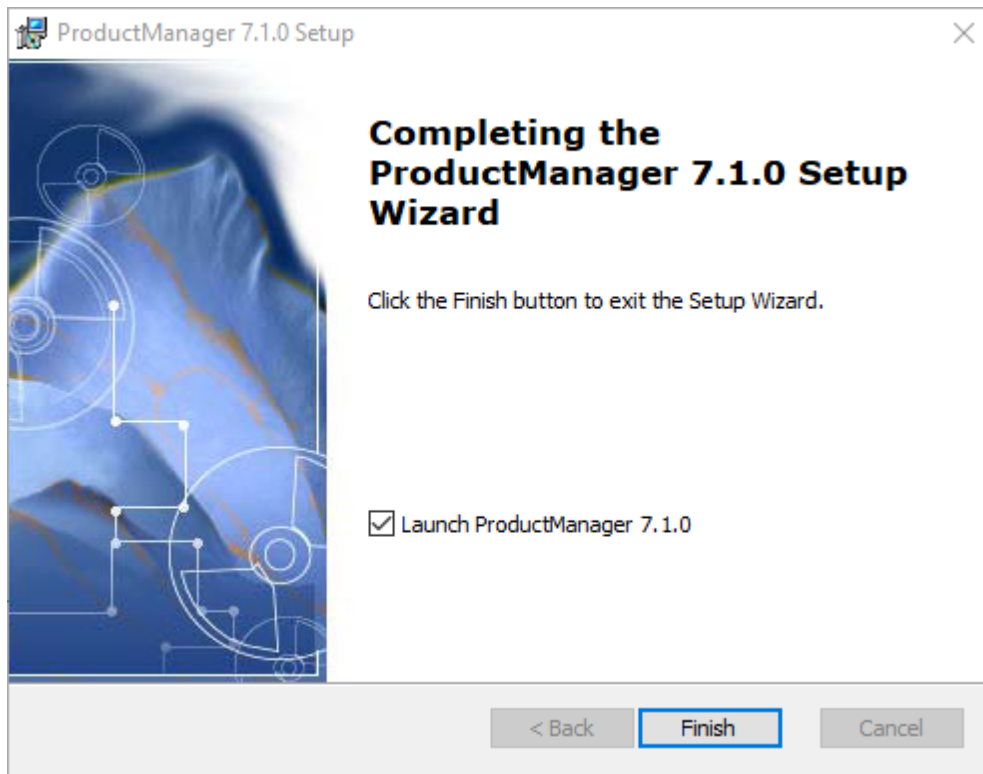
8. At the Destination Folder window it is recommended that you accept the default folder location. Click **Next** to continue.



9. The ProductManager can now be installed. Click **Next** to begin the installation.




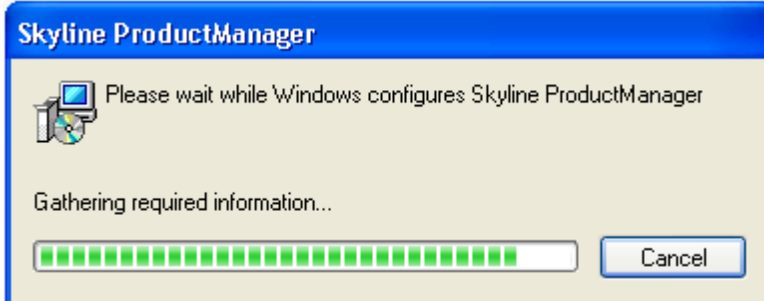
10. It should only take a few minutes to install ProductManager. When the installation is complete click **Finish**.



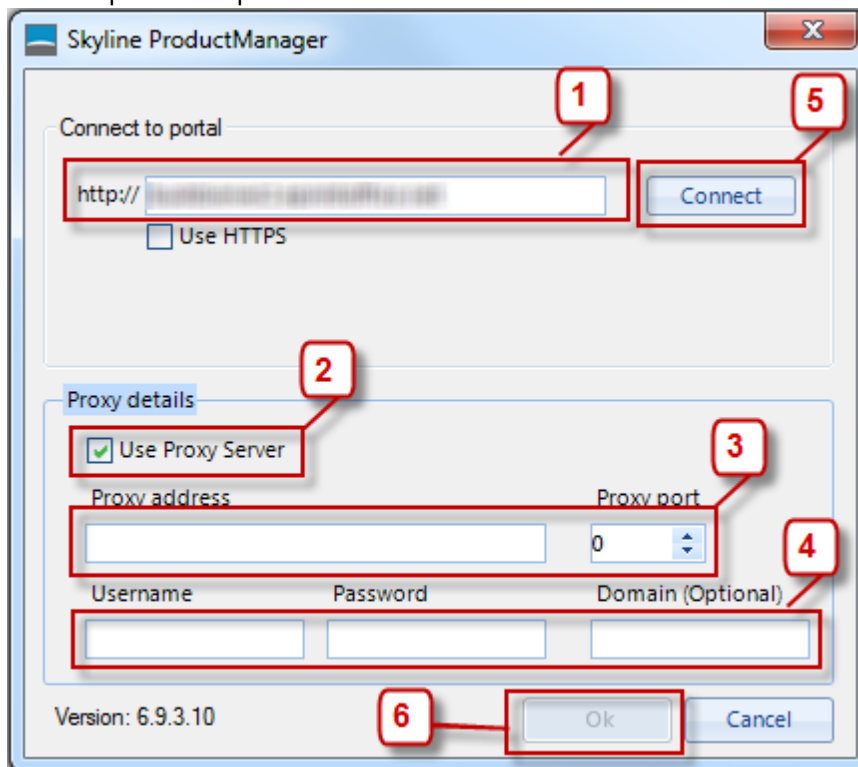
When you have completed the installation ProductManager will be installed.

To open ProductManager for the first time:

1. Click  ProductManager
2. The first time that ProductManager is started after the installation it will take a few seconds for the program to be configured. A window opens similar to the one shown below.

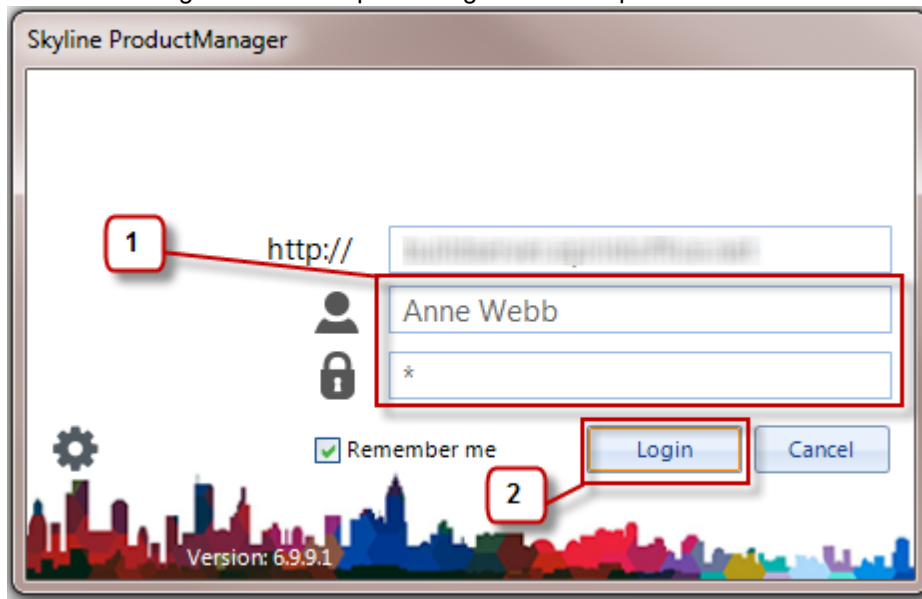


3. The Setup window opens.



1. Enter your portal name.
2. (Optional) Select **Use Proxy Server**.
3. (Optional) Enter your Proxy address and Proxy port number.
4. (Optional) Enter your username and password.
5. Click **Connect**. You will receive confirmation that the portal connection was successful.
6. Click **OK**.

4. When the configuration is complete a log in window opens.



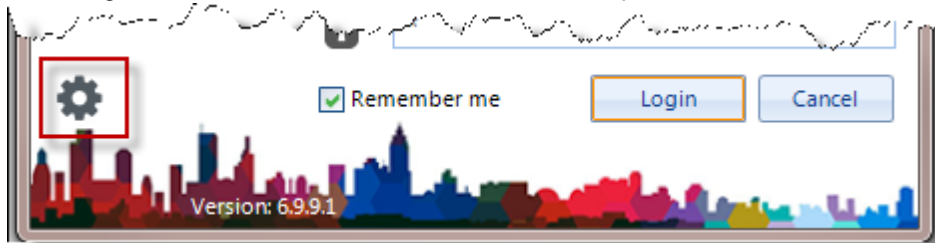
1. Use the same log in that you use to access the Skyline Portal.
2. Click **Log in** to start ProductManager.

Running ProductManager on a Proxy Server

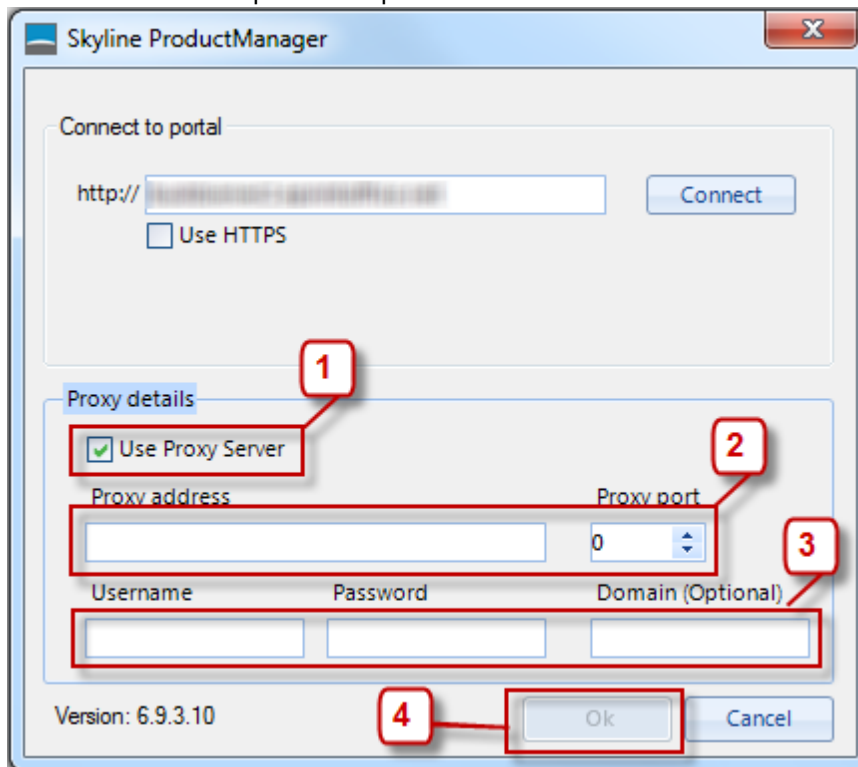
If you are using a proxy server you will need to enter the proxy settings when you first open ProductManager. The settings will be remembered for when you next open ProductManager.

To enter your proxy details:

1. At the log in window click on the connection icon to open the connection details window.



2. The connections setup window opens.



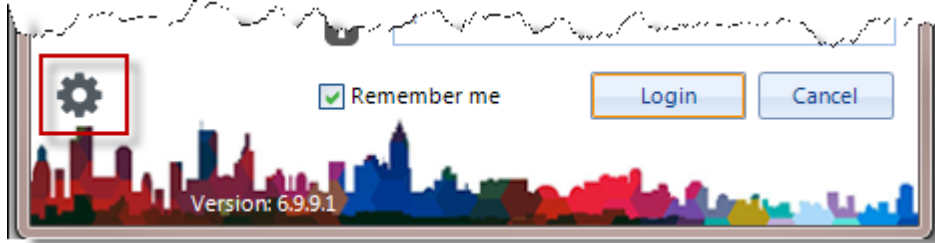
1. Select **Use Proxy Server**.
2. Enter your Proxy address and Proxy port number.
3. Enter your network login username and password.
4. Click **OK**.

Starting ProductManager with https

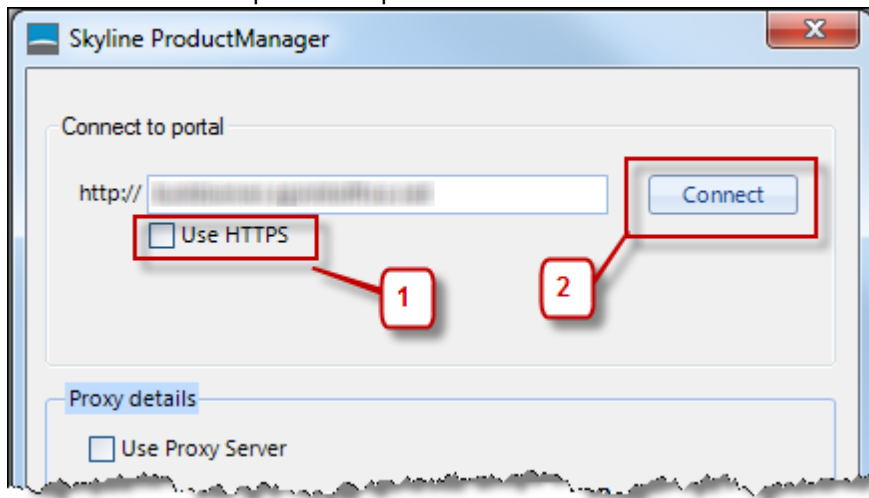
If you are connecting to an HTTPS website you need to re-set ProductManager when it is first opened.

To use https:

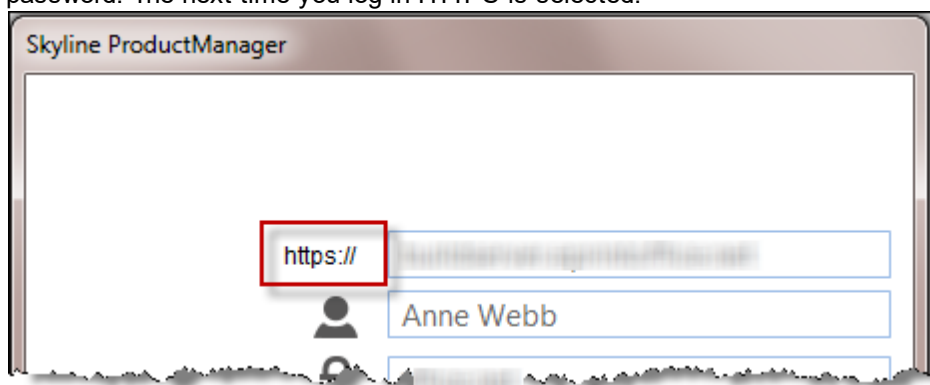
1. At the log in window click on the connection icon to open the connection details window.



2. The connections setup window opens.



1. Select the option Use **HTTPS**.
2. Click **Connect** to connect to ProductManager using HTTPS & log in with your username and password. The next time you log in HTTPS is selected.



Adding Print Room Options

When ProductManager is first used the print room options need to be configured. The options can also be amended at any time. When you are in ProductManager select Print Room Options in the menu bar to view the tabs.

At the top of the screen you will see three tabs.

- [Media](#)¹⁹ allows you to create and maintain the paper stocks available to your customers. These are used to create the products available to your customers.
- [Document Options](#)²¹ displays options relating to the actual document to be created such as Printed Sides, Number of Images per Side, Binding etc.
- [Delivery Options](#)²³ provides the necessary options for creating delivery address forms and any priority options you may wish to offer to your customers

Media Tab

Media allows you to create and maintain the paper stocks available to your customers. These are used to create the products available to your customers. Selecting a media type will highlight its properties. In the example, the properties for the media type Legal White 80gsm are shown.



Note:

The paper stocks need to be added in the print room options as a Media Type before products can be created.

Create and maintain a list of all the media types you have available. The list of Media Types shown here will be used when creating job tickets for products offered on a Skyline Portal.

↓ Indicates mandatory fields

Media Type	Type	Size	Colour	Weight	Holes
Legal White 120gsm	Paper	Legal	White	120 gsm	
Legal White 80gsm	Paper	Legal	White	80 gsm	
Legal White 90gsm	Paper	Legal	White	90 gsm	
Quality White Paper	Paper	Letter	White	120 gsm	
Standard Colored Coil Punch Paper	Paper	Letter	Ivory	80 gsm	Coil or spiral
Standard White Coil Punch Paper	Paper	Letter	White	80 gsm	Coil or spiral
Standard Colored Card Cover	Paper	Letter	Salmon	250 gsm	

Description
Legal White 80gsm [Add] [Remove] [Update]

Type [Paper] [Transparency] [Other]
Size [Letter] [Legal] [11 x 17] [Slip]
Colour [White] [Ivory] [Salmon]
Weight [80 gsm] [90 gsm] [100 gsm] [120 gsm] [160 gsm] [200 gsm] [250 gsm]
Holes [Ring Binder 2 holes] [Ring Binder 3 holes] [Ring Binder 4 holes] [Coil or spiral]
Grade []

Front Coating [] Back Coating []

To add a new media type:


1. Enter a name for the media in the description box.
2. Select the properties of the new media. The minimum requirements are: Type, Size, Colour and Weight.
3. Click **Add** to save the new media type.

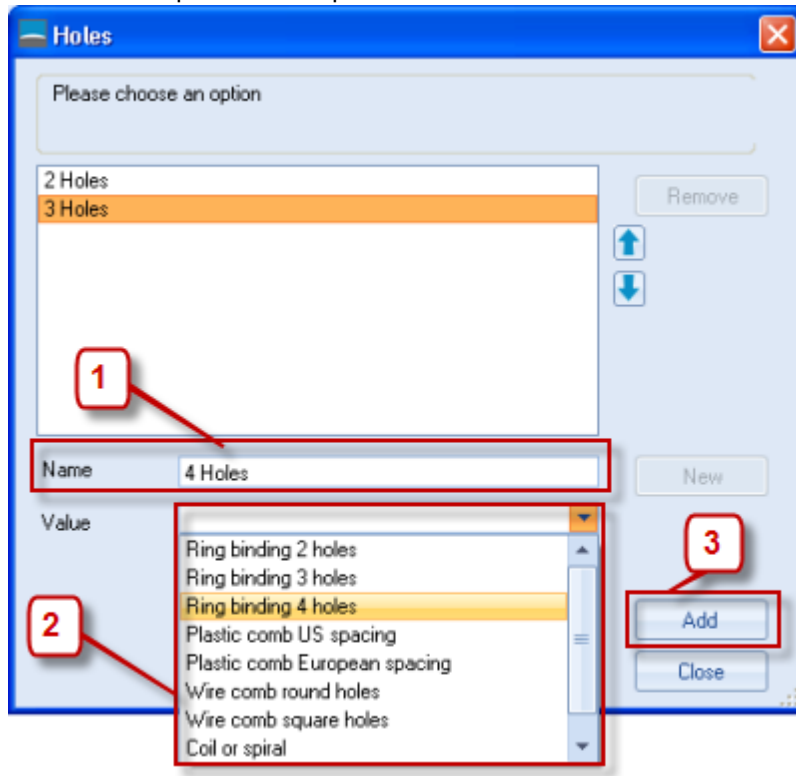
To add a new media type based on an existing media type:

1. Select the existing media type that you want to base your new media on.
2. Enter a new name for the media by changing the name in the description box.
3. Change one or more of the selected properties.
4. Click **Add** to save the new media type.

Further media options are available (e.g. Holes, Grading and Front and Back Coating) to enable you to create many types of stock for your products.

To add a new media options:

1. Click  above the option block you want to use.
2. The selected option window opens. Enter the details of the new media option.



- Enter a name for the media option.
 - Select a value from the drop down list.
 - Click **Add**. The selected value is added into your options.
3. When all the required options have been added, click **Close** to return to the Media tab.

Document Options Tab

Document Options displays options relating to the actual documents to be created such as printed sides, number of images per side, binding etc. These options can be priced as a cost per document using CostManager.


Up to 20 extra options, known as Custom options, can be added if required. Custom document options can also be priced as a cost per document using CostManager. In addition the cost per document price can be different for different quantities. This is known as price banding which can be applied to Custom Document options if required.

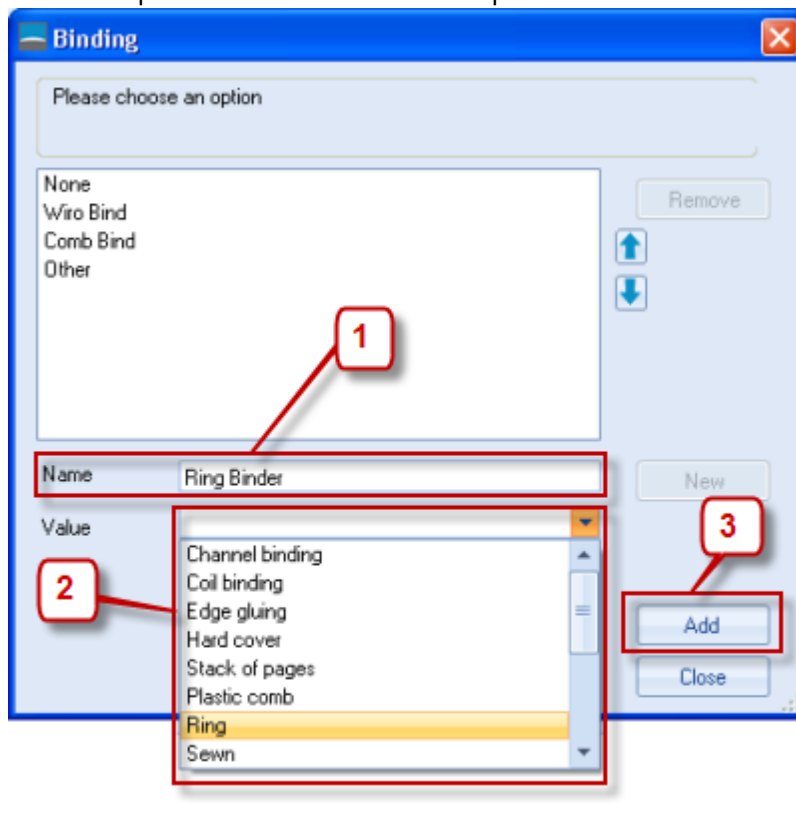



Custom Options **MUST** be added to the Binding document part which can be renamed to suit the product.

The Production box contains values for different types of printers. These are used to provide different media pricing when adding prices to products when printed from different machines.

To add new document options:

1. Click  above the document option you want to add a new option to.
2. A window opens where the details of the option are entered.




1. Enter a name for the document option.
 2. Select a value from the drop down list. The value can only be used once.
 Only use a value **ONCE**. If it is used multiple times errors will happen.
 3. Click **Add**. The selected value is added into your options.
3. When all the options have been added, click **Close** to return to the Document Options tab.

Delivery Options Tab

Delivery Options provides the necessary options for creating delivery address forms and any priority options you may wish to offer to your customers.

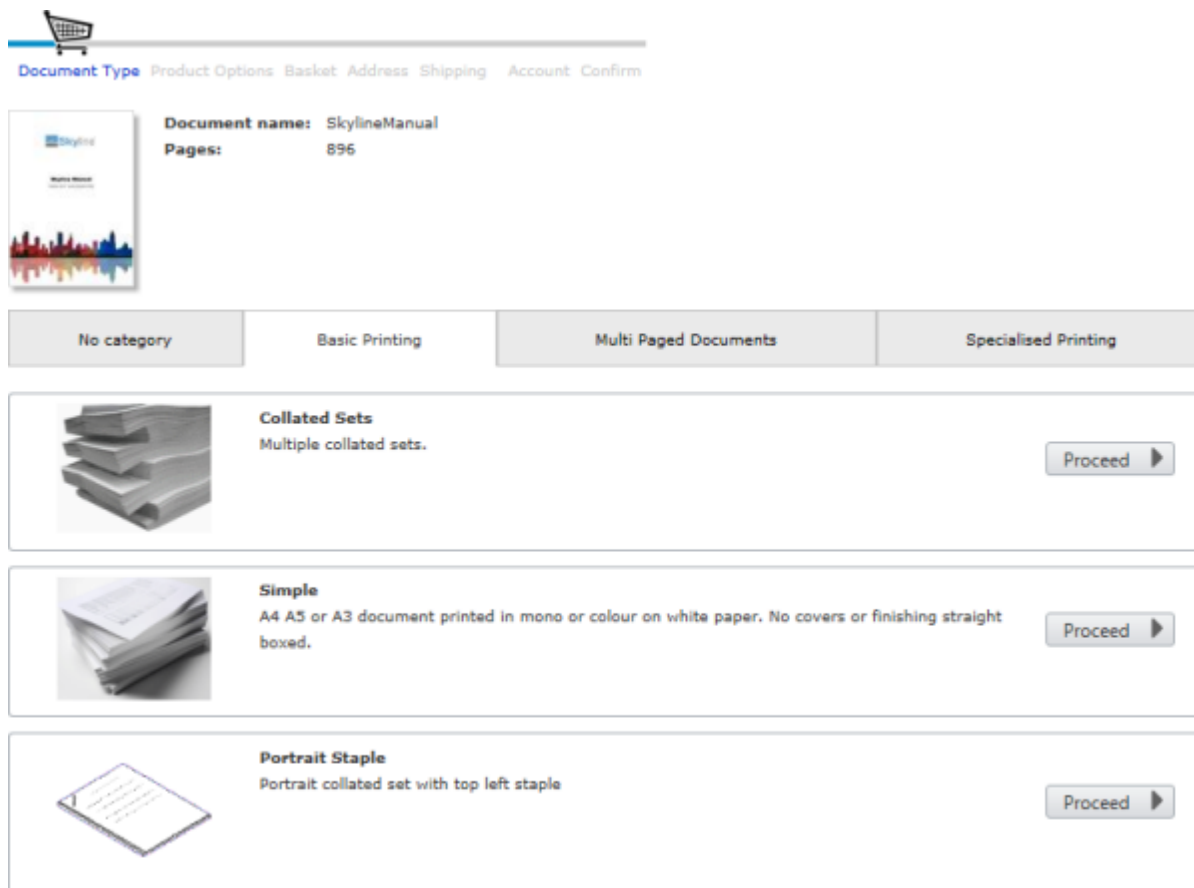
To add new delivery options:

1. Click  above the delivery option you want to amend.
2. A window opens where the details of the option are entered.

1. Enter a name for the delivery option.
2. Click **Add**. The new name is added into your options.
3. When all the options have been added, click **Close** to return to the Delivery Options tab.

Managing Products

When the print room options have been configured you can create new products. Your Skyline portal is pre-configured with a simple selection of products that can be used as they are or amended to suit your requirements. Once you have created a product additional fields that are available to be added to all products can be assigned to the product. For more information please refer to the section on [adding additional fields](#)⁴⁹.



The screenshot displays the Skyline ProductManager interface. At the top, a navigation bar includes a shopping cart icon and links for Document Type, Product Options, Basket, Address, Shipping, Account, and Confirm. Below this, a document preview shows a 'Skyline' logo and a city skyline. To the right of the preview, the document name is 'SkylineManual' and the page count is '896'. A horizontal menu below the preview offers four categories: 'No category', 'Basic Printing', 'Multi Paged Documents' (which is selected), and 'Specialised Printing'. Under the 'Multi Paged Documents' category, three product options are listed, each with an icon, a title, a description, and a 'Proceed' button with a right-pointing arrow:

- Collated Sets**: Multiple collated sets.
- Simple**: A4 A5 or A3 document printed in mono or colour on white paper. No covers or finishing straight boxed.
- Portrait Staple**: Portrait collated set with top left staple.

Creating a Product

When the print room options have been configured you can create new products. When the [products are made available](#)³² to specific portals, end users can place an order on the print room using the new product.

If you are producing a booklet the document option **Images Per Side** must always be included in the body/ pages document part though It can be hidden from the end user. The CostManager will correctly calculate the paper costs if the options Images per slide is used when creating products for Booklets.

The screenshot displays the configuration interface for creating a product. It features a list of options, each with a dropdown menu and a set of control icons (eye, info, edit, delete, down arrow, up arrow). The options are:

- Paper:** A3 White 80 gsm
- Mono/Colour:** Black and White
- Printed Sides:** Two sided
- Production:** Digital printer 1
- Images Per Side:** Two Up (This option is highlighted with a red rectangle)
- Finishing:** Booklet With Staples

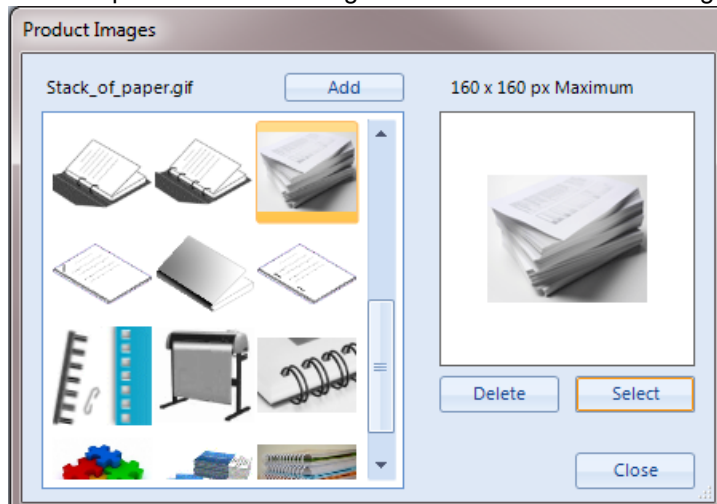
If you are using the pricing facility, the Body document part should always contain the following document options:

- **Media** - The paper stock that is available for the product. This option should always be at the top of the list.
- **Printed Sides** - Double sided or single sided printing.
- **Printer Type** - The user should be able to select whether the printing is colour or black and white.

To create a new product:

1. Select **Products > New Product** from the menu bar.

1. You need to select an image to represent the product. Click **Select Image**. The product image window opens. Select an image from the list of available images.



2. Enter a name for your new product and a brief description. The minimum and maximum number of pages can also be set to define the products displayed in the user selection in the main Skyline application.

3. (Optional) Leave blank so that any value can be entered when a user places an order.

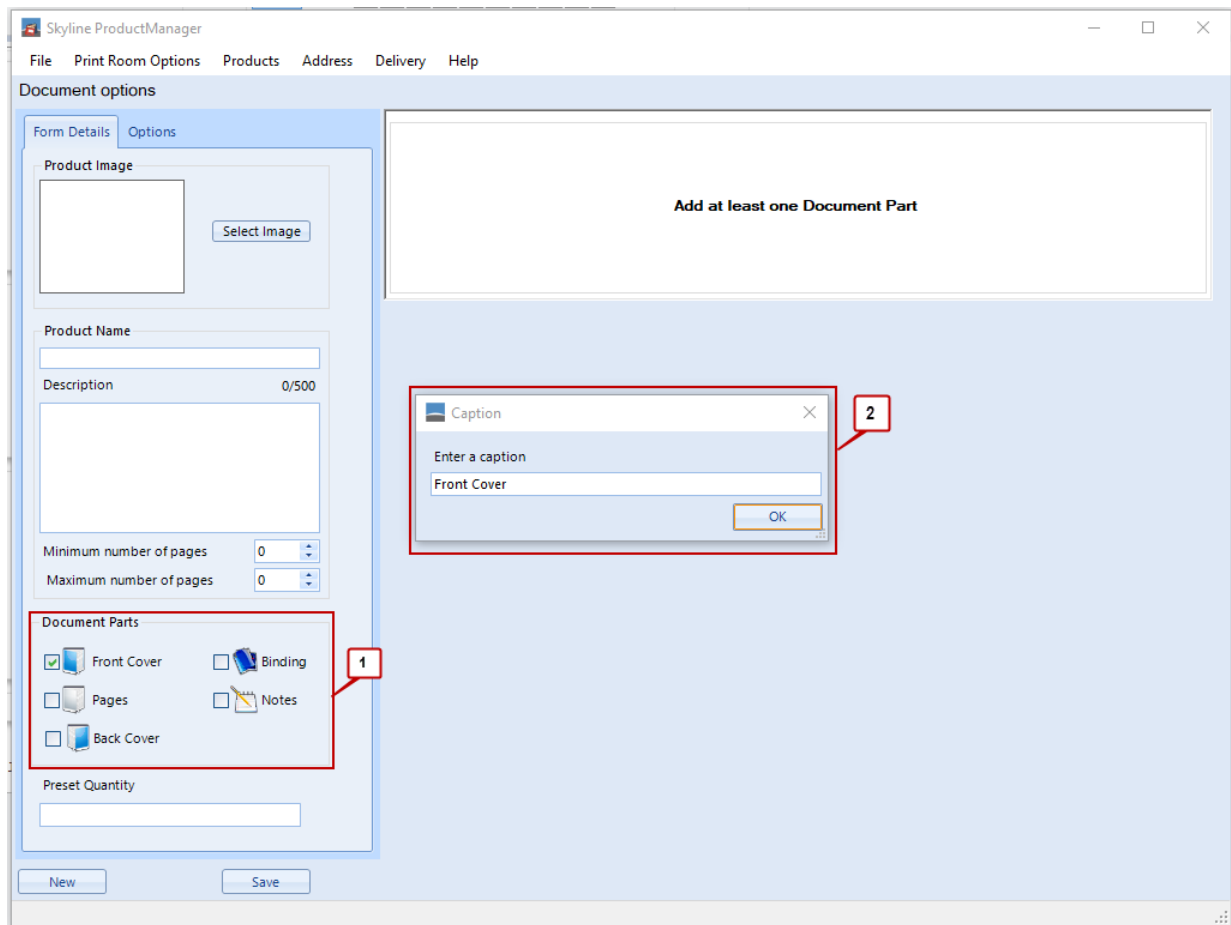
If you want to give a choice of how many copies can be ordered enter the required values separated by a comma. For example 1,10,25,50 would create a drop down box on the product containing just the values specified. See example below. If you wanted to enter a fixed quantity just enter a single number. The quantity required field will contain that number and the value cannot be changed when an order is being placed.



Quantity 1 ▼

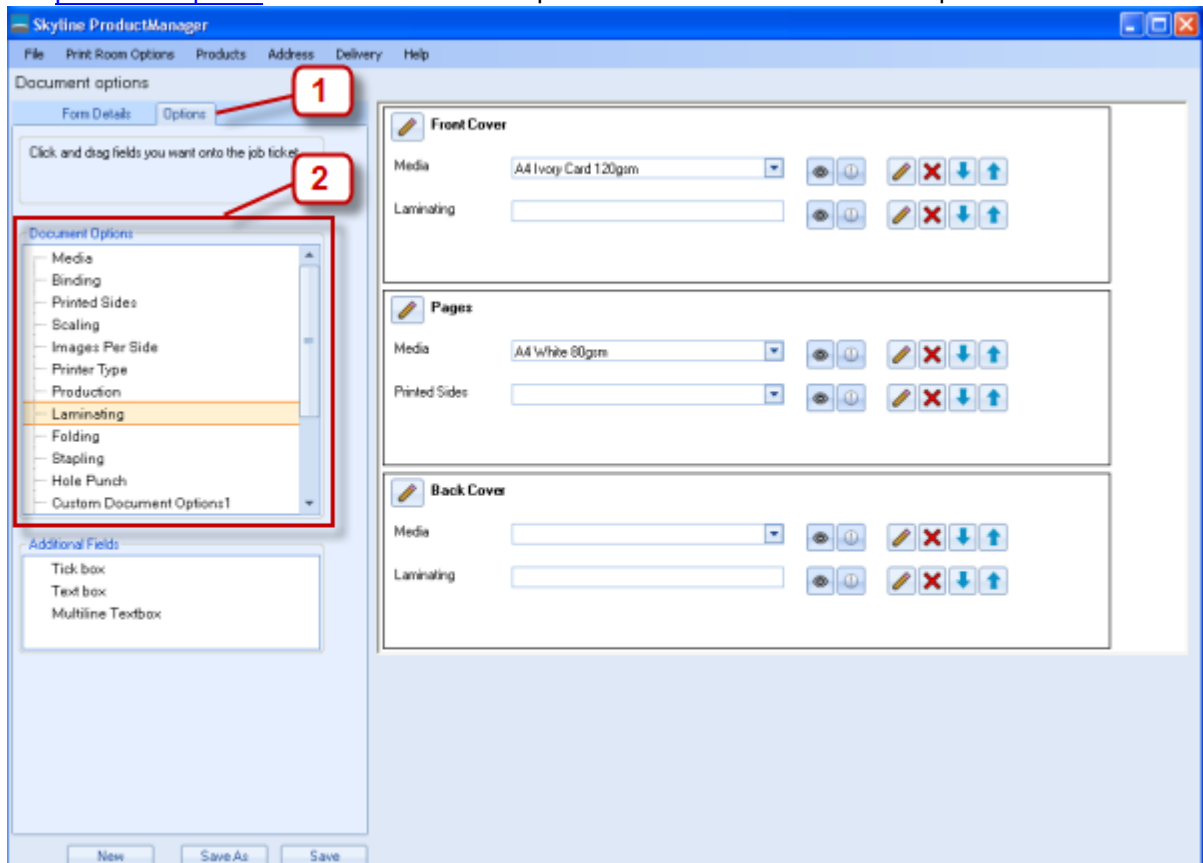
- 1
- 10
- 25
- 50

- The components comprise of our main parts that can be selected as required along with a selectable 'Notes' field.



- In the example the document part Front Cover had been selected. Once a part has been selected it is shown in the main area of the screen.
- The document part Pages is then selected. You are able to add a caption for the document part, as shown in the example.

3. The [print room options](#)¹⁸ that have been setup can now be selected for the new product.



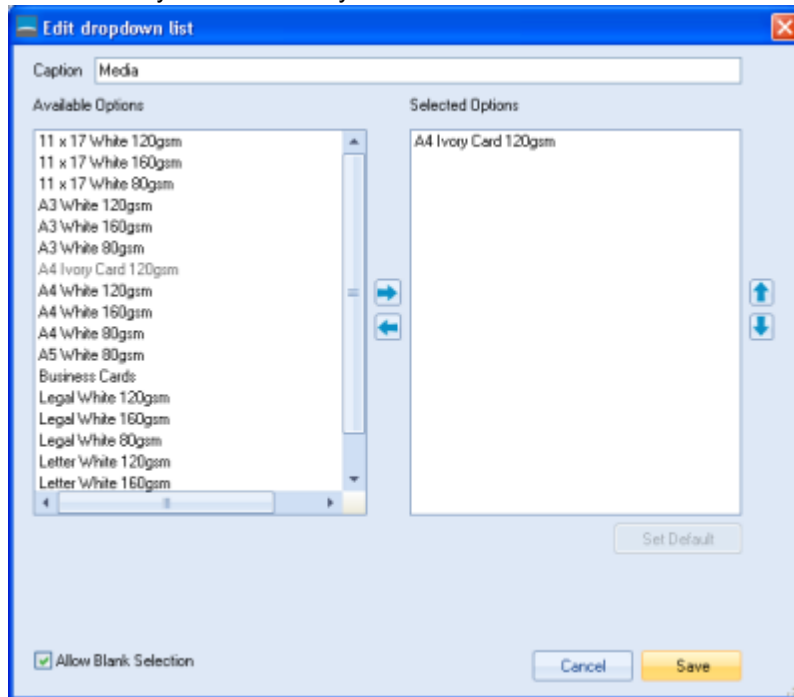
1. Click the Options tab. Each of the document parts that have been selected are showing in the main area of the window.
2. A list of the document options is shown. Each of the document options can be offered to the end user when they select the product type. Drag a document option from the list to a document part.




If the option Laminating is used it should only be added to the Front Cover, Back Cover or Body sections.

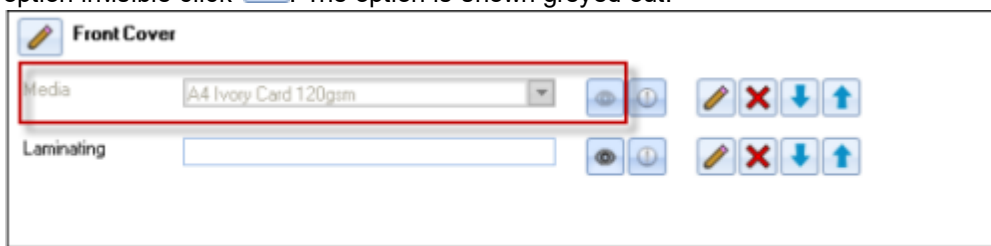
Custom Options **MUST** be added to the Binding document part which can be renamed to suit the product.




A window opens so that you can make specific choices regarding the option selected. For example, if you selected Media you would be able to change the caption and select the paper stock. Once you have made your selection click **Save**.



Note: If you have a section of options and Allow Blank Selection is selected there will be no option automatically selected when the end user views the product options. If you want there to be a default product selected highlight the product and click Set Default. The selected option will show in red to indicate it is the default product.

4. Each option selected is added to the document part. The option can be offered as a drop down selection or as an individual item which has conditions applied. The conditions can make the items mandatory or invisible to the user.
 - If there is no choice that the end user has to make, the option can be made invisible. To make an option invisible click . The option is shown greyed out.



- Use  to edit the option. For example, you might want to add another media choice to the option.
- Use  to delete the document option.
- Use  to amend the order that the document options will appear on the job ticket.

5. Click **Save** to save your new product.

Adding Images for Products

Product images are portal specific and are stored in the portal GUID in \\wwwroot\\images\\Products. Any images in GIF, JPEG or PNG format can be uploaded as long as they are not larger than 160 x 160 pixels.

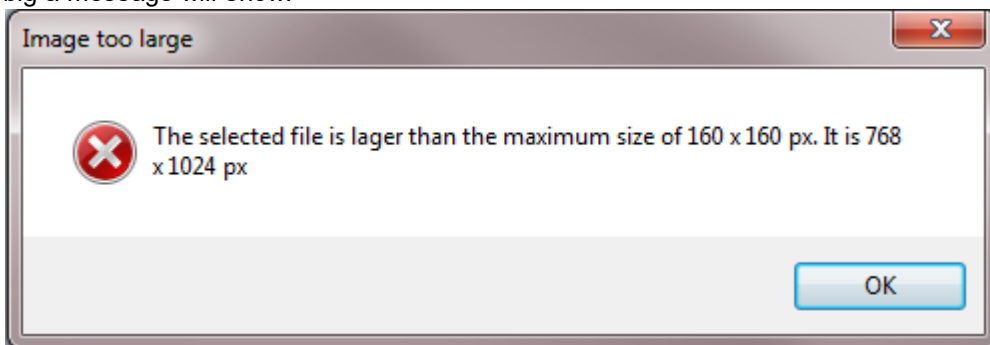


When a user places an order and a product image is shown as a stack of books it shows that the product has no image. You need to add the image to the product.



To upload a new image:

1. Open **ProductManager**.
2. From the **Products** drop down menu select **New Product**.
3. Click **Select Image** to open the Product Images window.
4. Click **Add** to open your Windows Explorer. Locate the product image that you want to add to the portal library.
5. Click **Open** to upload the image. The file size cannot exceed 160 x 160px. If you select a file that is too big a message will show.



6. The image will be added to the available images.

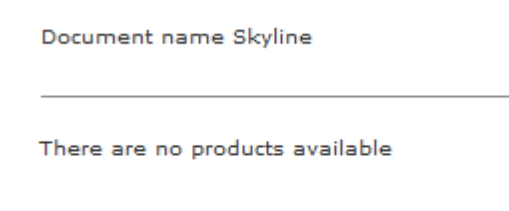
Adding Products to a Portal

When a new product has been created the product has to be added to a Skyline portal before it will be available for the user to order.



Note:

If products have not been added to the portal you will see an error message when you try place an order. If this happens please contact your administrator.



To add a product to a Skyline portal:

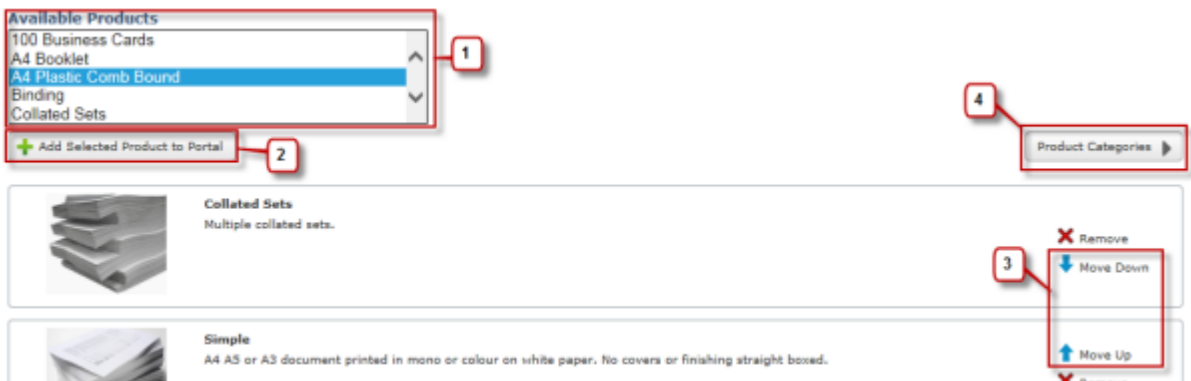
1. Log in with Administrator rights and go to **Admin**.
2. In the Products section click **Select Products**.



Select Products

Manage and assign products for your portal

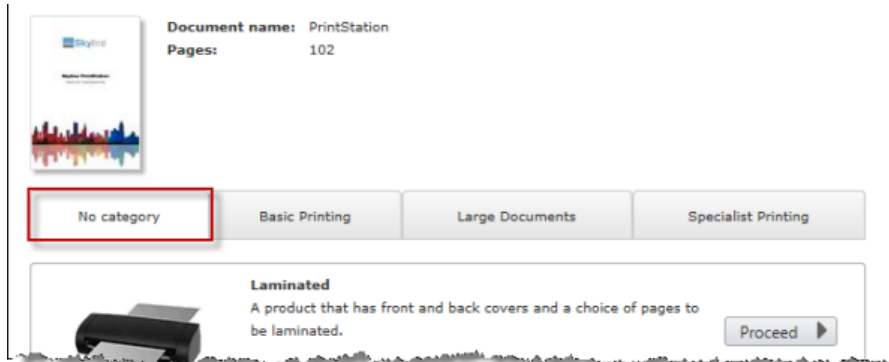
3. A window opens showing all the products that are available to your portal users.



1. Select the new product from the Available Products list.
2. Click Add Selected Product to Portal.
3. The new product will be added to the portal. Use the Move Up or Move Down options to arrange the products in an order that you want presented to the end user.
4. Click to [assign products to categories](#)³³.

Managing Products and Categories

Products can be grouped together in categories. When an order is placed the user can view the available products in each category and select the required product. Products that are organized into categories are easier to use than a long list of all the available products. Products are assigned to one category, they can not appear in more than one category. If a product is not assigned to a category it will be listed on the web page under a tab named 'No category'.

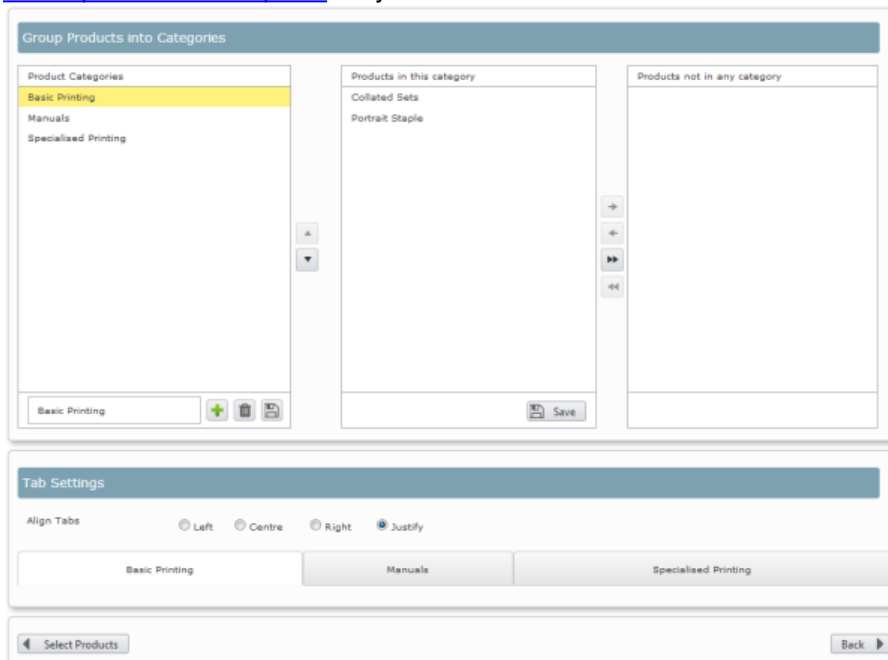


To view Product Categories:


1. Log in with Administrator rights and go to **Admin**.
2. In the Products section click **Product Categories**.

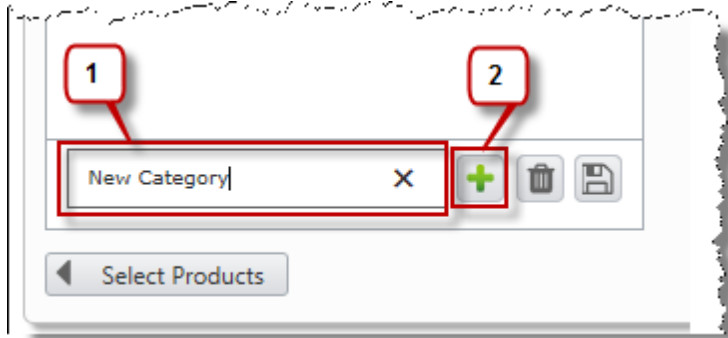



3. A window opens showing the product categories and products available to the portal. If you have just [added products to the portal](#)³² you will see the same window.




To create a new Category:

1. Enter a new category name in the product category field at the bottom of the window.
2. Click  to add the category.


**To amend the category name:**

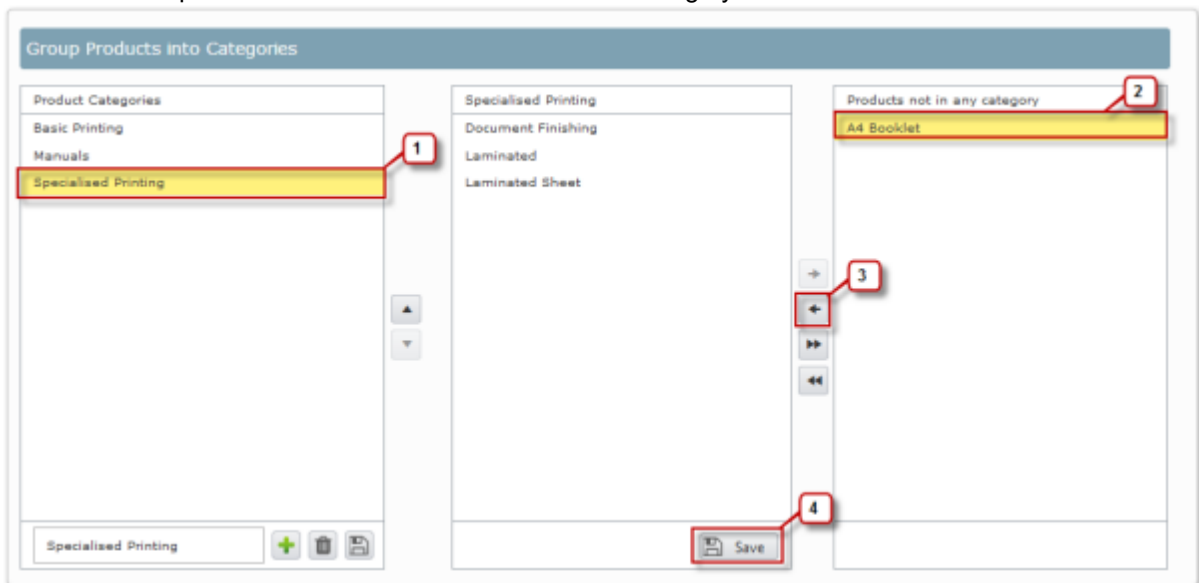
1. Select the category.
2. Amend the category name in the product category field at the bottom of the window.
3. Click  to save your changes.

To remove a category:

1. Select the category.
2. Click  to remove the category. All products assigned to the deleted category will be listed in the Products not in any category column. The products will need to be assigned to another category.

To assign a product to a category:

1. Select a product category.
2. Select a product that has not been assigned to a category.
3. Click . The product will be moved into the selected category.



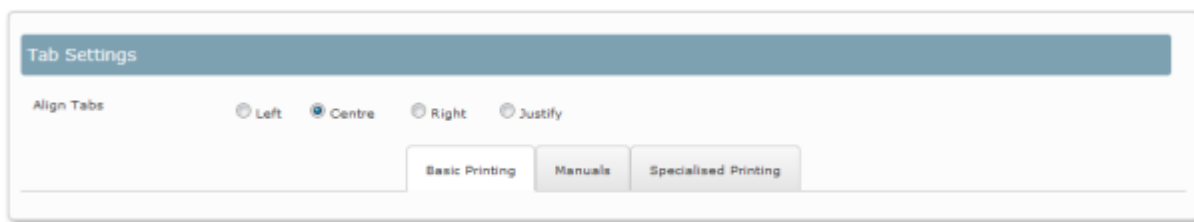
You can select the layout of the tab settings. Depending on the number of categories that you have and the size of the names one tab setting may be preferred to another. To amend the tab settings simply select the required layout.

Left Aligned Tabs



The screenshot shows the 'Tab Settings' dialog box. At the top is a blue header bar with the text 'Tab Settings'. Below it, the 'Align Tabs' section has four radio buttons: 'Left' (selected), 'Centre', 'Right', and 'Justify'. At the bottom, there are three tabs: 'Basic Printing' (active), 'Manuals', and 'Specialised Printing'.

Centre Aligned Tabs



The screenshot shows the 'Tab Settings' dialog box. At the top is a blue header bar with the text 'Tab Settings'. Below it, the 'Align Tabs' section has four radio buttons: 'Left', 'Centre' (selected), 'Right', and 'Justify'. At the bottom, there are three tabs: 'Basic Printing', 'Manuals' (active), and 'Specialised Printing'.

Right Aligned Tabs



The screenshot shows the 'Tab Settings' dialog box. At the top is a blue header bar with the text 'Tab Settings'. Below it, the 'Align Tabs' section has four radio buttons: 'Left', 'Centre', 'Right' (selected), and 'Justify'. At the bottom, there are three tabs: 'Basic Printing', 'Manuals', and 'Specialised Printing' (active).

Justified Tabs



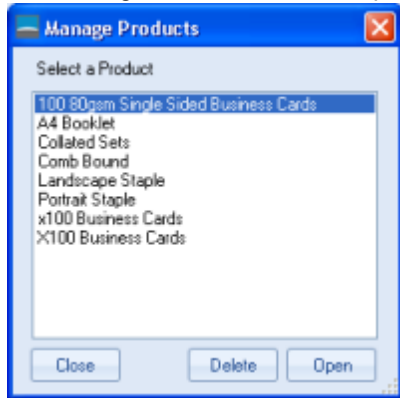
The screenshot shows the 'Tab Settings' dialog box. At the top is a blue header bar with the text 'Tab Settings'. Below it, the 'Align Tabs' section has four radio buttons: 'Left', 'Centre', 'Right', and 'Justify' (selected). At the bottom, there are three tabs: 'Basic Printing' (active), 'Manuals', and 'Specialised Printing'.

Amending Products

Your Skyline portal is pre-configured with a simple selection of products that can be amended to suit your requirements. You may also need to update products that you have configured.

To amend an existing product:

1. Select **Products > Manage Products** from the menu bar.
2. The Manage Products window opens. Select the product that you want to amend and click **Open**.



3. The form details for the selected product is shown. Make the amendments as required and click **Save** to update your amended product. See the example below.

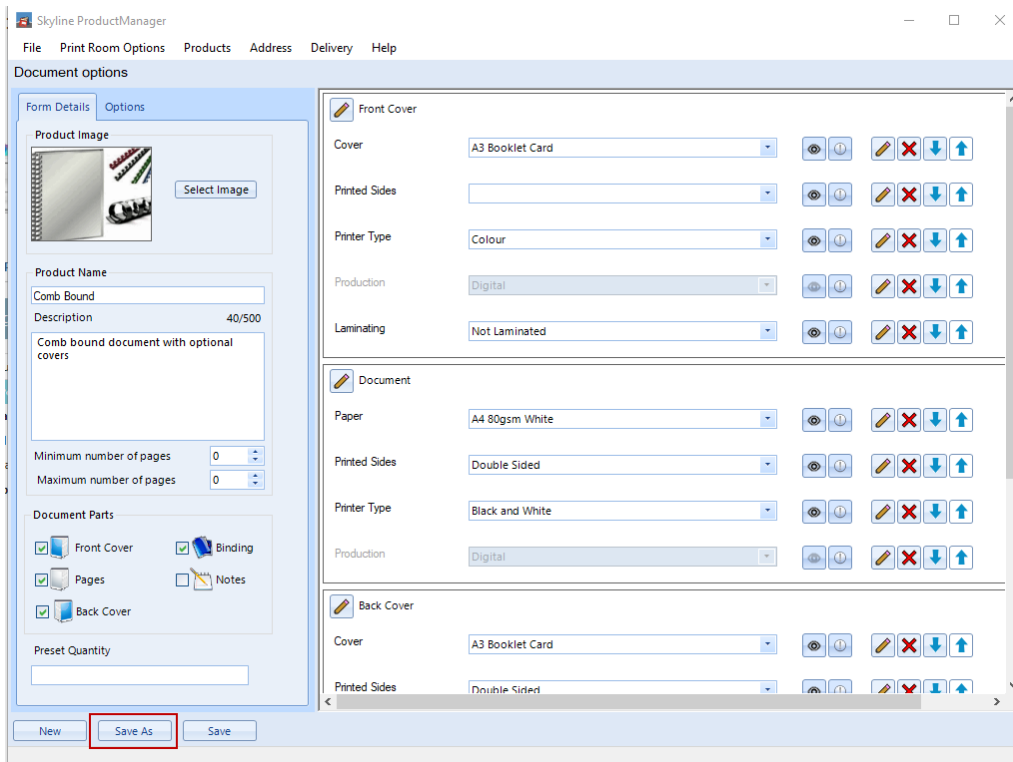
For more information on amending the document options see [Creating a Product](#)²⁵ where the document options are explained.

Creating New Products From an Existing Product

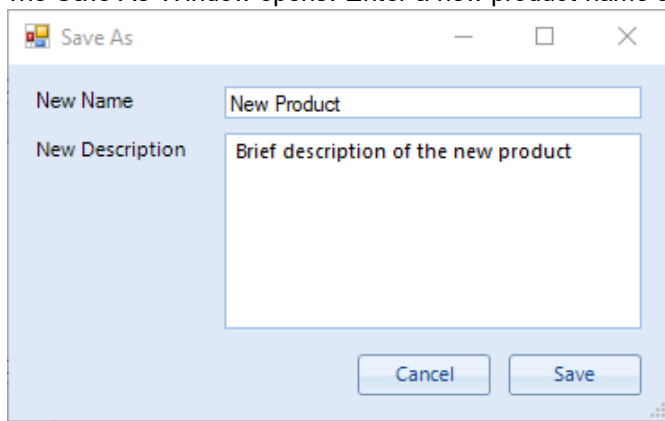
You can create a new product based on a product that you have already created. This can save time if there are only slightly different choices available between two products.

To create a new product from an existing product:

1. From the **Products** drop down menu select **Manage Products** then select the product that you want to base your new product on.
2. Your selected product is opened.
3. Click **Save As**.



4. The Save As Window opens. Enter a new product name and description then click Save.



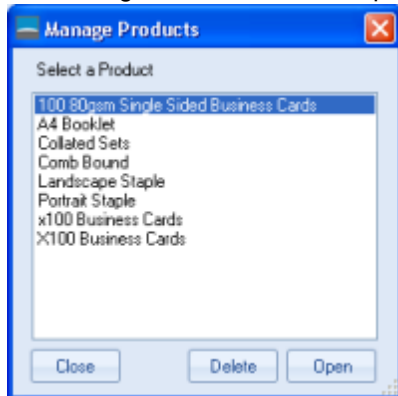
5. A copy of the original product will be saved with a new name. Make any changes in the product as required and then click Save.

Deleting Products

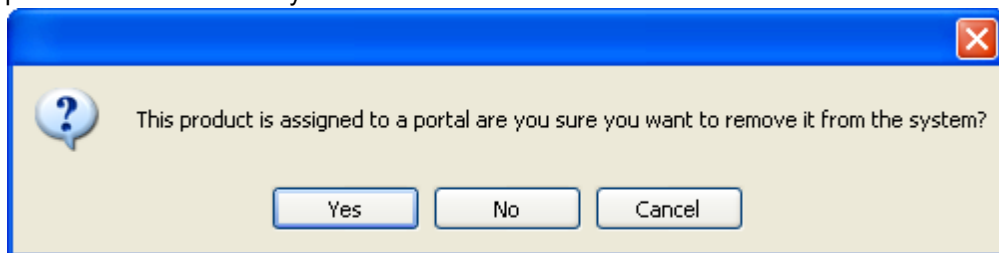
Media types and printing options may change. There may be some products that have been created are no longer available and the product needs to be deleted. It could be that you only want to remove the product option from a specific portal but users of a different portal will still have the product option. In this case you would want to delete the product from a portal.

To remove a product completely:

1. Select **Products > Manage Products** from the menu bar.
2. The Manage Products window opens. Select the product you want to delete and click **Delete**.



3. You will receive a warning if the product is assigned to a portal. Click **Yes** to complete deleting the product from the whole system.



To remove a product from a Skyline portal:

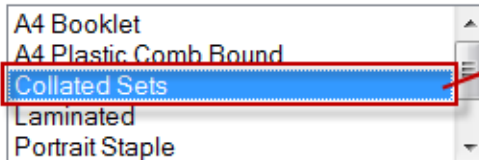
1. Log in with Administrator rights and go to **Admin**.
2. In the Products section click **Select Products**.

Select Products

Manage and assign products for your portal


3. A window opens showing all the products that are available to your portal users.

Available Products »



Add Selected Product to Portal ►



1. Select the product from the Available Products list.
2. Click  **Remove** associated with the product to remove it from the portal. The product will be available on any other portals that it has been assigned to.

Adding Product Notes

You can create a free text area that customers can enter information regarding their order. It is important that the notes section is added to the bottom of the product

Document options

Form Details Options

Product Image

Select Image

Product Name

Collated Sets

Description 22/500

collated sets on test2

Minimum number of pages 0

Maximum number of pages 0

Document Parts

☐ Front Cover ☐ Binding

☒ Pages ☒ Notes

☐ Back Cover

Preset Quantity

New Save As Save

Document

Paper A4 White 80gsm

Printed Sides Double Sided

Printer Type Black and White

Further Information

Example of a Product which contains a notes section

When notes are added to a product they allow the customer to add information or requests regarding the order that they are placing. The notes will appear on the original job ticket.

Print Job Ticket

Collated Sets


Document Name: CostManager
Order Number: 0000122
Created: 05/08/2024 09:08 AM

Owner: Anne Webb
Pages: 30
Quantity: 200
Status: Order Placed
Account Code: IT2
Account Name: IT Brochures
Account Description: Test Account
Price Estimate: 330.00
Original Price: 330.00



Document

Paper: A4 White 80gsm

Printed Sides: Double Sided

Printer Type: Black and White

Further Information

Please produce 1 copy for my approval before the complete order is produced.

First Name: Anne

Family Name: Webb

Street: Long Street

Example showing the product notes on the original job ticket

If you use the Approval feature the product notes are shown on the Notes tab.

Overview
Details
Customer Details
History
Notes
Additional Fields

User Notes
Please produce 1 copy for my approval before the complete order is produced.

Your Notes (Not visible to user)

Example showing the product notes on the Notes tab when viewing the order for approval

Once the order is passed to the PrintStation the notes can be seen on the Overview tab.

The screenshot shows the 'Overview' tab of the PrintStation interface. It contains various input fields for order details: Pages (30), Copies (200), Priority (Normal), Date Submitted (05 August 2024), Date Required, Document (A4 White 80gsm), Paper, Printed Sides (Double Sided), Printer Type (Black and White), Laminated, Front Cover, Back Cover, Binding, Stapling, Hole Punching, Folding, and a Price field showing 330.0000 with a 'Calculate Price' button. A red rectangle highlights the 'User Notes' field, which contains the text: 'Please produce 1 copy for my approval before the complete order is produced.' A small instruction 'CTRL Enter to insert a new line' is visible in the top right corner of the notes field.

Example showing the product notes on the PrintStation

The notes will also show when a manager views the order using Live Orders.

The screenshot shows the 'Details' tab of the Live Orders interface. It features tabs for Overview, Details, Customer Details, History, Printing, and Notes. On the right, there are buttons for 'Anne Webb', '0000122', and 'Order Placed'. A red rectangle highlights the 'User Notes' field, which contains the text: 'Please produce 1 copy for my approval before the complete order is produced.' To the right of this field is another empty field labeled 'Your Notes (Not visible to user)'.


Example showing the product notes on the Details tab of Live Orders

If you print a standard job ticket the notes will appear at the bottom of the printout. The location of the notes may differ if you are using any customized job tickets.

JOB TICKET

Customer	Angus McDonald	ePrint
Contact Name	Angus	Price Estimate
Email	annette.webber@eprint.net	Order Date
Phone	4567 123 45670	Site Date
Account No.		Shipping Method

Document: Skyline CostManager



Order No.	0002265
-----------	---------

Delivery Address
Long Street
Any City
The World

Priority: Not urgent

Pages per document: 558
 No of copies: 200
 Product Type: Collated Sets

Body

Printer Type	Black and White
Stock	A4 White 80gsm
Printed Sides	Double Sided

Front Cover

Printed Sides	
Printer Type	
Stock	
Laminated (Y/N)	False

Back Cover


Printed Sides	
Printer Type	
Stock	
Laminated (Y/N)	False

Finishing

Folding	
Hole Punching	
Stapling	
Binding Type	

NOTES

Please produce 1 copy for my approval before the complete order is produced.



Date printed - 24/04/2018 11:52:28

Example showing the product notes on the Standard Job Ticket.

A4 Booklet Example

The example is for an A4 booklet. The printing is onto A3 paper which is folded and stapled to produce the booklet. The customer has the option of a different cover, but obviously the front and back cover will be the same media.



Points to remember:

- The document option Images Per Side must always be included in the body/pages document part though it can be hidden from the end user.
- The Body document part should always contain the document options Media, Printed Sides, Printer Type and Production.
- The option Media should always be at the top of the list.
- The option Production is usually hidden as the user is not required to select the type of printer to be used.

The screenshot displays the configuration interface for an A4 booklet, organized into three main sections: Pages, Details, and Front and Back Cover. Each section contains a list of options with dropdown menus and a set of control icons (eye, info, edit, delete, and move up/down).

Section	Option	Value
Pages	Paper	A3 White 80gsm
	Mono/Color	Black and White
	Printed Sides	Double Sided
	Images Per Side	2
	Production	Digital
Details	Folding	Booklet With Staples
Front and Back Cover	Media	A3 Booklet Card
	Mono/Colour	Black and White
	Printed Sides	Not Printed
	Images Per Side	2

If you are using CostManager with the costs entered as shown below, the cost for a 40 page booklet printed double sided with a printed single sided cover would be 3:50 per copy. It has also been assumed that there are no costs per document applied for creating the booklet. If an additional handling charge is required the binding cost per document for a booklet with staples could be added.

Media Name	Colour printing per page		Monochrome printing per page		Media cost (Optional)	Laminating (Optional)	
	Double sided	Single sided	Double sided	Single sided			
A3 Booklet Card	0.0600	0.0600	0.0600	0.0600	2.0000	0.0000	
A3 White 80gsm	0.3000	0.3000	0.0600	0.0600	0.0300	0.0000	

The front and back cover cost is 2.06

A3 Booklet Card, printed single sided in colour.

Media cost is calculated by:

1 sheet of A3 booklet card is required at a cost of 2.00 per sheet

$$1 \times 2.00 = 2.00$$

Printing cost is calculated by:

2 divided by 2 as images per side is 2 = 1

Printed single sided

$$1 \times 0.06 = 0.06$$

The pages cost is 1.44

There are 38 pages printed double sided in black & white on A3 white paper 80gsm

Media cost is calculated by:

38 divided by 2 as images per side is 2 = 19.

19 divided by 2 being printed double sided = 9.5

Therefore 10 pages of A3 white paper 80gsm required at a cost of 0.03 per sheet.

$$10 \times 0.03 = 0.30$$

Printing cost is calculated by:

38 divided by 2 as images per side is 2 = 19.

Printed double sided

Therefore 19 sides are being printed

$$19 \times 0.06 = 1.14$$

A4 Comb Bound Example




In the example the user has the option of the front and back pages of the document to be produced on a different media. The cover pages can also be laminated if required.

Points to remember:

- The Body document part should always contain the document options Media, Printed Sides, Printer Type and Production. The wording can be changed for the end user e.g media shown as Paper.
- The option Media should always be at the top of the list.
- The option Production is usually hidden as the user is not required to select the type of printer to be used.

Body				
Media	A4 White 80gsm			
Printed Sides	Double Sided			
Mono/Colour	Black and White			
Production	Digital			
Binding				
Binding	Plastic Comb Bound			
Cover				
Media	A4 White Card 160gsm			
Printed Sides	One Sided			
Mono/Colour	Black and White			
Laminating	Laminated			
Back Cover				
Media	A4 White Card 160gsm			
Printed Sides	One Sided			
Mono/Colour	Black and White			
Laminating	Laminated			

If you are using CostManager with the costs entered as shown below, the cost for a 40 page comb bound document printed double sided with a laminated printed single sided front cover & a unprinted back cover would be 4.92 per copy.

Media Name	Colour printing per page		Monochrome printing per page		Media cost (Optional)	Laminating (Optional)	
	Double sided	Single sided	Double sided	Single sided			
A3 Booklet Card	0.2000	0.2000	0.0300	0.0300	0.1000	0.2500	
A3 White 80gsm	0.0500	0.0500	0.0300	0.0300	0.0500	0.2500	
A4 Green Card 160gsm	0.0000	0.0000	0.0000	0.0000	0.5000	0.2500	

Front cover cost is 0.55

A4 white card 160gsm, colour printed single sided & laminated

Media cost is 1 x 0.10

Printing cost is 1 x 0.20

Laminating cost is 1 x 0.25

Body cost is 2.17

A4 white 80gsm paper, mono printed double sided.




Media cost is 39 divided by 2 as being printed double sided = 19.5 therefore 20 x 0.05 = 1.00

Printing cost is 39 x 0.03 = 1.17

Back cover cost is 0.5

A4 green card 160gsm, not printed and not laminated

Media cost is 1 x 0.5

Price Type	Cost Per Page	Cost Per Document	Cost Per Order
Binding			
<input checked="" type="radio"/> Binding			
<input type="radio"/> Stapling			
<input type="radio"/> Hole punching			
<input type="radio"/> Folding			
<input type="radio"/> Scalloping			
Binding			Price
None			0.0000 
Hard Cover			0.0000 
Plastic Comb Bound			1.7000 

Binding cost per document is 1.70

Using Additional Fields

If you require more information from your users when they place an order there is a licensed feature which enables additional fields to be added to a product. Once a product has been created additional fields can be added to enable the user to specify further details of their order. The additional fields are shown on the original job ticket and on a tab within the PrintStation. They can also be included in custom job tickets.

If you are using Global products on multiple portals the additional fields assigned to the global product are specific to a portal.

The fields types are either text, numerical, check, drop down boxes or a calendar picker and can be made mandatory with options added for drop down lists. Customer entries in the additional fields are limited to 1024 characters.

The additional fields types are [defined](#)⁵¹ and then [added](#)⁵⁹ to a product in the Skyline Website and will appear below the selected product when an order is being placed. The fields can be added to one or more products. Additional pricing can be applied to a product when the [check](#)⁵⁵ or [drop down](#)⁵⁶ fields are added, if required.

**Note:**

Changes should not be made to live orders if you are using pricing on Additional fields.

Document Type Product Options Basket Address Shipping Account Confirm

Document name: Manual (602)
Pages: 602
Pages with colour: 556
Monochrome pages 46

Simple Printing
Single or double sided printing with no finishing options.

Body

Media: A4 White 80gsm
Printed Sides: Double Sided
Printer Type: Black and White

Additional Fields

Text Field
Numeric Field
Tick Box
Drop Down Choice
Lots of Notes

Return to Library ☒ Save Job Ticket Quantity Next

An example of a product with 5 different additional fields added.

Print Job Ticket

Simple Printing

**Document Name:** Manual (602)**Order Number:** 0005086**Created:** 25/10/2022 02:10 PM**Owner:** Anne Webb**Pages:** 602**Quantity:** 1**Status:** Downloaded**Account Code:****Account Name:****Account Description:****Price Estimate:** 862.05

Document

Paper	A4 White 80gsm
Printed Sides	Double Sided
Printer Type	Black and White
Production	Digital

Organization Name	ePrint
First Name	Anne
Family Name	Webb
Street	Long Street
City	Big City
Region	The World
Contact Number	0123456789

Priority	Normal
Delivery Method	I will pick it up

Further Information

Enter Export Code	kagsd874ho9
Type of Invoice Required	Single
Premium Paper Required	<input checked="" type="checkbox"/>
Cardboard Tube per Order	<input checked="" type="checkbox"/>
Colour of Ribbon	Blue
Type of packaging for each document	Cardboard Box
Notes box	more and more notes
Cardboard tube per poster	<input type="checkbox"/>
Project Reference Number	1235879

Example of a job ticket with additional field details

Defining Additional Field Types

You can define the field type for each field as required. There are 5 types of fields available - [Textbox](#)⁵², [Multiline Textbox](#)⁵³, [Numeric Field](#)⁵⁴, [Checkbox](#)⁵⁵, [Dropdown List](#)⁵⁶ and [Date Picker](#)⁵⁸. All fields can be assigned the same field type or any combination of types to suit your requirements.

It is recommended that you give the fields a name which describes the type of field you are creating. The fields are listed when you [assign](#)⁵⁹ a field to a product and that is where you would add a more descriptive name for the field which will appear on the product. The maximum length of the field name is 50 characters.

Each field can be used in different products.

To Define the Additional Field Types:

1. Log in with Administrator rights and go to **Admin**.
2. In the Products section click **Additional Fields**.



[Define Additional Field Types](#)

Define additional field types for your Job Tickets

3. The Additional Fields window opens.

The screenshot shows the 'Additional Fields (37)' window. On the left, there is a list of 37 fields: A1 Poster, Cardboard Tube, Checkbox if not urgent, Checkbox if VERY urgent, Commercial Items only, Commercial Sample, Confidential Document, Cost Code (Office Use only), Customer Name, Date of Publication, Department, Documents, Enter Export Code, Flower, and Further Information. In the center, there is a column of field types: Textbox, Multiline Textbox, Numeric Field, Checkbox, DropDown List, and Date Picker. On the right, there is a 'Setting up Additional Fields' section with a link to the 'Online Manual'.

Example of the Define Additional Field Types window with 37 fields that have been defined.

Defining a Text Field

To define a Text Field:

1. Select the field type **Textbox**.
2. The additional fields are displayed. Enter a Field name and any other field requirements then click **Add Field**.

New TextBox

Field Name

Empty Text

Default Text

☐ Make this field mandatory

Mandatory Message

Add Field

- Field Name - Enter the name you want to use to identify the field.
- Empty Text - Enter text to be displayed when the field is empty
- Default Text - Text to be automatically entered but can be changed by the user.
- Make this field mandatory - Some text must be entered before the order can be placed
- Mandatory Message - Message to be displayed if the field is not completed.

Your new field has been created.

All Additional Fields

To edit an existing Additional Field, click on the field name below

- Cost Code (Office Use only)
- Customer Name
- Customer Reference Number
- Date of Publication
- Department
- Documents
- Enter Export Code
- Enter Further Information
- Flower
- Further Information
- Gift
- Name Changed
- Name of Customer**
- New Employees Name
- numbers

TextBox

- Multiline TextBox
- Numeric Field
- CheckBox
- DropDown List
- Date Picker

TextBox

Field Name

Empty Text

Default Text

☐ Make this field mandatory

Mandatory Message

Save **Delete**

Assigned to product:

Setting up Additional Fields

You can get help with setting up the Additional Field in the online user manual [Online Manual](#)

Defining a Multi Lined Field



A user can enter up to 1024 characters in a multi-lined text box

To define a Multi Lined Text Field:

1. Select the field type **MultiLine Textbox**.
2. The additional fields are displayed. Enter a Field name and any other field requirements then click **Add Field**.

New Multiline TextBox

Field Name

Empty Text

Default Text

☐ Make this field mandatory

Mandatory Message

Add Field

- Empty Text - Enter text to be displayed when the field is empty
- Default Text - Text to be automatically entered but can be changed by the user.
- Make this field mandatory - Some text must be entered before the order can be placed
- Mandatory Message - Message to be displayed if the field is not completed.

Your new field has been created.

All Additional Fields

To edit an existing Additional Field, click on the field name below

- Cost Code (Office Use only)
- Customer Name
- Customer Reference Number
- Date of Publication
- Department
- Documents
- Enter Export Code
- Enter Further Information**
- Flower
- Further Information
- Gift
- Name Changed
- Name of Customer
- New Employees Name numbers

TextBox

- Multiline TextBox
- Numeric Field
- CheckBox
- DropDown List
- Date Picker

Multiline TextBox

Field Name

Empty Text

Default Text

☐ Make this field mandatory

Mandatory Message

Save **Delete**

Assigned to product:

Setting up Additional Fields

You can get help with setting up the Additional Field in the online user manual [Online Manual](#)

Defining a Numeric Field

To define a Numeric Field:

1. Select the field type **Numeric Field**.
2. Enter a Field name and any other field requirements then click **Add Field**.

New Numeric Field

Field Name

Minimum Value

Maximum Value

☐ Make this field mandatory

Mandatory Message

Add Field

- Minimum Value - The minimum value that can be entered. This field can be left blank.
- Maximum Value - The maximum value that can be entered. This field can be left blank.
- Make this field mandatory - Some information must be entered before the order can be placed
- Mandatory Message - Message to be displayed if the field is not completed.

Your new field has been created.

All Additional Fields

To edit an existing Additional Field, click on the field name below

- Cost Code (Office Use only)
- Customer Name
- Customer Reference Number**
- Date of Publication
- Department
- Documents
- Enter Export Code
- Enter Further Information
- Flower
- Further Information
- Gift
- Name Changed
- Name of Customer
- New Employees Name
- numbers

Field Type Selector:

- TextBox
- Multiline TextBox
- Numeric Field**
- CheckBox
- DropDown List
- Date Picker

Numeric Field Configuration:

Field Name

Minimum Value

Maximum Value

☐ Make this field mandatory

Mandatory Message

Save **Delete**

Assigned to product:

Setting up Additional Fields

You can get help with setting up the Additional Field in the online user manual

[Online Manual](#)

Defining a Checkbox Field

To define a checkbox:

1. Select the field type **CheckBox**.
2. Enter a Field name and any other field requirements then click **Add Field**.

The screenshot shows a form titled "New CheckBox". It contains the following fields and options:

- Field Name:** A text input field with the placeholder text "Field Name Required".
- Checked by default:** An unchecked checkbox.
- Make this field mandatory:** An unchecked checkbox.
- Mandatory Message:** A text input field with the placeholder text "Mandatory message to users".
- Add Field:** A button at the bottom left.

- Checked by default - Select this option if the majority of the time order will be received with the option selected.
 - Make this field mandatory - Not currently supported
 - Mandatory Message - Not currently supported
3. Add the pricing per page, per document and/or per order, then click **Save**. The cost per page, cost per document and cost per order is included in the calculated cost for the order.

The screenshot shows two parts of the interface:

CheckBox Form:

- Field Name:** A text input field containing "Urgent Order".
- Checked by default:** An unchecked checkbox.
- Make this field mandatory:** An unchecked checkbox.
- Mandatory Message:** A text input field containing "Message to users if field is empty".
- Buttons:** "Save" and "Delete" buttons at the bottom left.

Pricing Section:

Pricing can be added to an order when the CheckBox is ticked

Price per page	Price per document	Price per order
<input type="text"/>	<input type="text"/>	<input type="text"/>

Defining a Dropdown Field



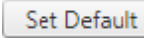
To define a dropdown field:

1. Select the field type **DropDown List**.
2. Enter a Field name and any other field requirements then click **Add Field**.

The screenshot shows a form titled "New DropDown List" with the following fields and controls:


- Field Name:** A text input field containing the placeholder text "Field Name Required".
- Mandatory:** A checkbox labeled "Make this field mandatory".
- Mandatory Message:** A text input field containing the placeholder text "Mandatory message to users".
- DropDown list:** A section containing a large text area labeled "DropDown Options". To the right of this area are two small square buttons with up and down arrows for list manipulation.
- Option Entry:** A text input field containing the placeholder text "New option name", followed by three icons: a green plus sign (+), a trash can, and a floppy disk.
- Start with blank entry:** A checkbox labeled "Start with blank entry".
- Default option:** A text input field containing the placeholder text "Select option to Set as Default". Below this field are two buttons: "Set Default" and "Clear Default".
- Add Field:** A button at the bottom left of the form.

- Make this field mandatory - Select if an option must be selected before the order can be placed
- Mandatory Message - The message to be displayed if the field is not completed and the option Make this field mandatory has been selected.

2. Create the drop down entries.
 - Enter a name in the New option name field.
 - Click  to add the option name. When you have added all the option names click  to save your entries.
3. Select the option **Start with blank entry** if you do not want an option pre-selected. If you want an option selected by default select the option in the DropDown list and then click . The option selected will be the option that the order will contain unless the option is changes by the person who is placing the order.
4. Add the pricing per page, per document and/or per order for each different DropDown item. The cost per page, cost per document and cost per order is included in the calculated cost for the order.

Pricing can be added to each DropDown item

Option	Cost Per Page	Cost Per Document	Cost Per Order
Eco Bag - Free	<input type="text"/>	<input type="text"/>	<input type="text"/>
Plastic Bag	<input type="text"/>	<input type="text"/>	<input type="text"/>
Cardboard Box	<input type="text"/>	<input type="text"/>	<input type="text"/>
Wooden Presentation Box	<input type="text"/>	<input type="text"/>	<input type="text"/>

5. Click  to save your requirements.

Defining a Date Picker Field

To add a Date Picker field:

1. Select the field type **Date Picker**.
2. Enter a Field name and any other field requirements then click **Add Field**.

The 'New Date Picker' dialog box contains the following fields and options:

- Field Name:** A text input field with the placeholder text 'Field Name Required'.
- Allow Dates in the Past:** An unchecked checkbox.
- Allow Weekends:** An unchecked checkbox.
- Minimum Lead Time:** A text input field with 'Days' and a vertical spinner.
- Make this field mandatory:** An unchecked checkbox.
- Mandatory Message:** A text input field with the placeholder text 'Mandatory message to users'.
- Add Field:** A button at the bottom left.

- Allow Dates in the Past - Select if you want people to select dates in the past.
- Allow Weekends - Select if you want to include weekends in your date selection.
- Minimum Lead Time - Enter the number of days required.
- Make this field mandatory - Select if an option must be selected before the order can be placed
- Mandatory Message - The message to be displayed if the field is not completed.


Your new field has been created.

The screenshot shows the ProductManager interface with the following components:


- All Additional Fields:** A dropdown menu showing a list of fields. 'Date Required' is highlighted.
- Field List:** A vertical list of field types: TextBox, Multiline TextBox, Numeric Field, CheckBox, DropDown List, and Date Picker (which is selected).
- Date Picker Configuration:** A panel for configuring the 'Date Required' field. It includes:
 - Field Name:** 'Date Required'
 - Allow Dates in the Past:** Unchecked checkbox.
 - Allow Weekends:** Unchecked checkbox.
 - Minimum Lead Time:** 'Days' with a spinner.
 - Make this field mandatory:** Unchecked checkbox.
 - Mandatory Message:** 'Message to users if date is not select'
 - Buttons:** 'Save' and 'Delete'.
- Assigned to product:** A field showing 'No Assigned Product'.
- Setting up Additional Fields:** A section with the text 'You can get help with setting up the Additional Field in the online user manual' and a link to the 'Online Manual'.

Adding Additional Fields


After Additional fields have been defined you can assign them to products. When a user orders a document and selects the product any additional fields will be made available. In the example below 3 additional fields have been added to the A4 Booklet product.



[Document Type](#) [Product Options](#) [Basket](#) [Address](#) [Shipping](#) [Account](#) [Confirm](#)



Document name: Manual (602)
Pages: 602
Pages with colour: 556
Monochrome pages 46



A4 Booklet
Create a booklet from documents printed onto A3 and folded to create an A4 booklet

Body

Media A3 White 80gsm

Printer Type Black and White

Printed Sides Double Sided

Binding

Binding Booklet

Front and Back Cover

Media

Printer Type

Printed Sides None

Additional Fields

Project Name

Project Code

Do you require a proof print? ☐

[Return to Library](#) ☒ Save Job Ticket Quantity [Next](#)

To Add Additional Fields:

1. Log in with Administrator rights and go to **Admin**.
2. In the Products section click **Assign Additional Fields**



[Assign Additional Fields](#)

Assigning Additional Fields to your Products

3. The Assign Additional Fields window opens. The number in brackets next to a product indicates how many additional fields have been assigned to the product.

NEEDS UPDATING

1. Select the product that you want to amend. A list of the all the available additional fields becomes available.
2. Select the Additional field to be added and click the arrow to add the field to the product.
3. As multiple fields can be added to a product, add any further fields as required.
4. Click **Save**.



Note:

When an additional field is removed from a product:

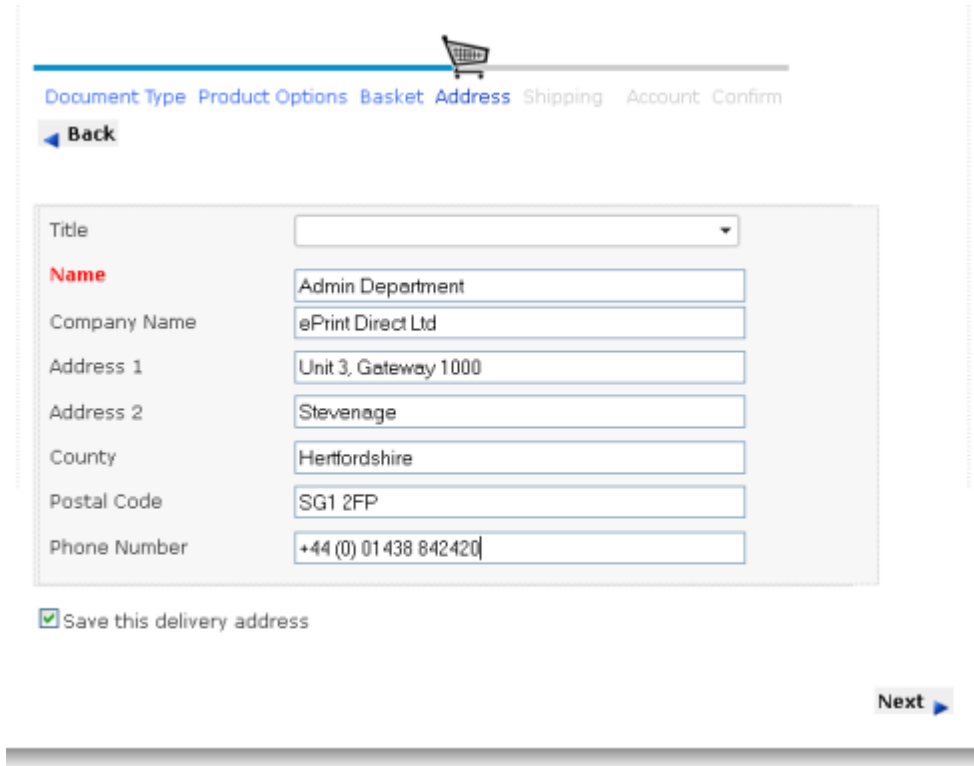
it is not removed from all previous orders for that product.

it is **removed** from the list of fields on the Approval page. This happens even if the order was placed when the product contained the field.

Managing Address Forms

During the process to place an order a user will have to enter their delivery address details. In the example the user has to complete the name field as it is showing in red indicating that it is a compulsory field. The address details can be amended to suit your working arrangements.

You can only have one address form associated with a portal. However, if you have several portals, you can design a specific address form to be associated with each portal. The address form can be updated and saved to your portal at any time.



The screenshot shows the 'Address' step in a checkout process. At the top, a navigation bar includes links for 'Document Type', 'Product Options', 'Basket', 'Address' (the current step), 'Shipping', 'Account', and 'Confirm'. A shopping cart icon is also present. Below the navigation bar is a 'Back' button. The main form area contains several input fields: 'Title' (a dropdown menu), 'Name' (a text field with 'Admin Department' entered and a red asterisk indicating it is compulsory), 'Company Name' (a text field with 'ePrint Direct Ltd' entered), 'Address 1' (a text field with 'Unit 3, Gateway 1000' entered), 'Address 2' (a text field with 'Stevenage' entered), 'County' (a text field with 'Hertfordshire' entered), 'Postal Code' (a text field with 'SG1 2FP' entered), and 'Phone Number' (a text field with '+44 (0) 01 438 842420' entered). At the bottom left of the form is a checkbox labeled 'Save this delivery address' which is checked. At the bottom right is a 'Next' button with a right-pointing arrow.

Creating Address Forms

Skyline is delivered with a default address form which can be [amended](#)⁶⁵ to fit your requirements. You can only have one address form associated with a portal. However, if you have several portals, you can design a specific address form to be associated with each portal.

**Note:**

If an address form has not been associated with the portal an error message will show when you try to place an order.

Document name

The system has not been configured. There are no delivery options selected.
Please contact the administrator

To create a new address form:

1. Select **Address > New Address Form** from the menu bar.
2. Enter a name for the new address form and brief description.

Skyline ProductManager

File Print Room Options Products Address Delivery Help

Address options

Form Details Options

Set the address form name and description then click on the options tab to add the required fields

Form Details

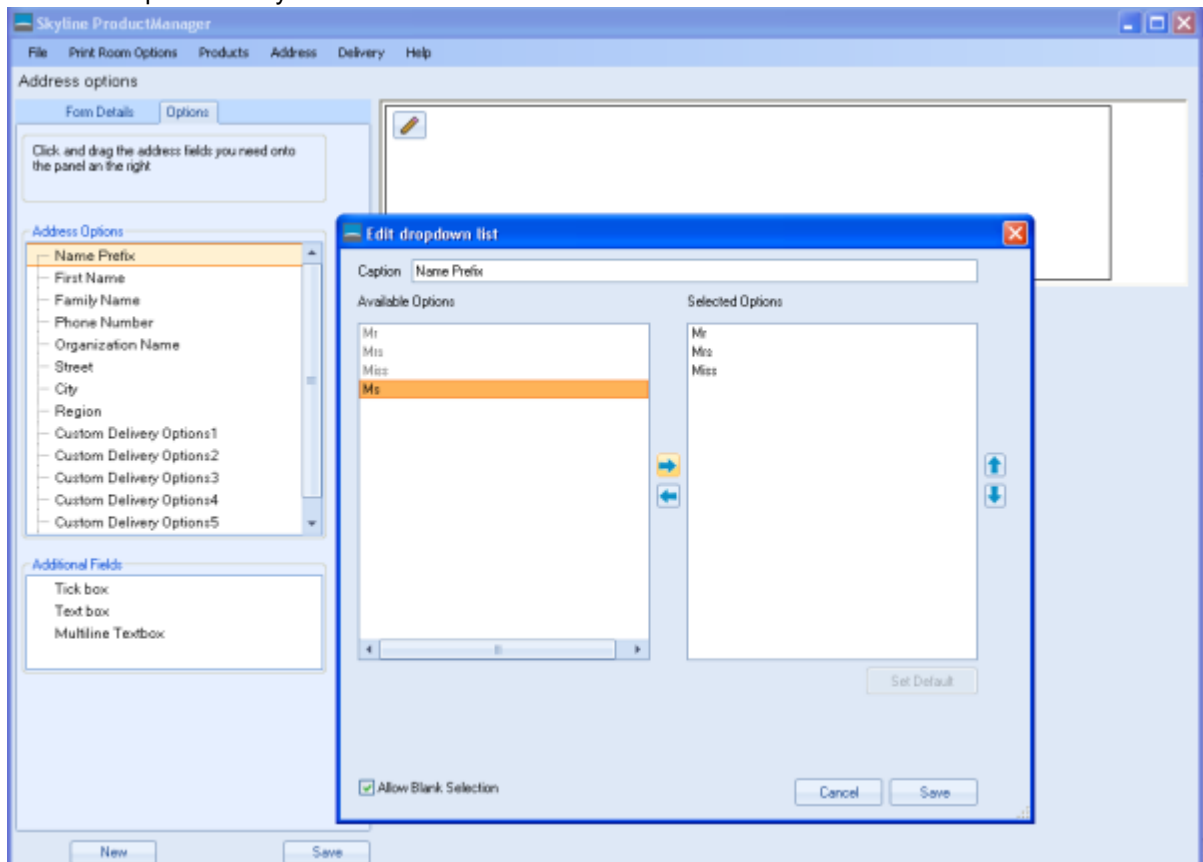
Form Name
Alpha Campus



Description
Address form for use with the Alpha Portal

42/250





New Save

3. Click the **Options** tab. Drag and drop the required fields into the blank panel. Some of the address form options will give the user a drop down list of choices for them to select from, as shown in the example. Select the options that you want to include in the form field & click **Save**.



- When you have added all your required address fields you can use the following buttons to make any fields compulsory or make other amendments.
- If there is no choice that the end user has to make, the option can be made invisible. To make an option invisible click . The option is shown greyed out.
- If you want to make completion of the field compulsory click . The field name colour changes to red indicating that the field must be completed.



- Use  to edit the option. For example, you might want to add another media choice to the option.
- Use  to delete the document option.
- Use   to amend the order that the document options will appear on the job ticket.

4. Click **Save** to save your new address form.

Associating an Address Form

When a new address form has been created it can be associated with a Skyline portal. Only one address form can be associated with a portal.

When a new address form is associated the users will not be able to amend their address details via the preferences link until they have placed an order. When they place an order they will be required to enter their address details and may have the option to save the delivery address.

**Note:**

If an address form has not been associated with the portal an error message will show when you try to place an order.

Document name

The system has not been configured. There are no delivery options selected.
Please contact the administrator

To associate an address form to a Skyline portal:

1. Log in with Administrator rights and go to **Admin**.
2. In the Orders section click **Select Address Form**.



Select Address Form

Assign a delivery form to a portal

3. Select the address form that you want to be used on the portal.

Use

- ☐ Alpha Campus
- ☒ Standard Delivery Address

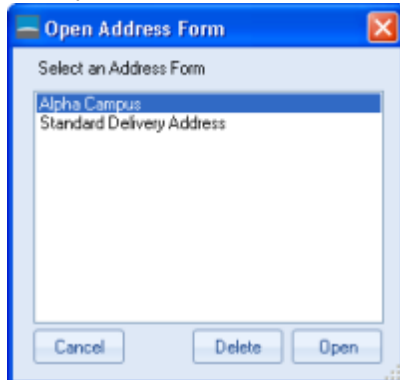
Back

Amending Address Forms

Skyline is delivered with a default address form. This can be amended to include any address fields that you require. Other address form can be created and modified at any time.

To amend an address form:

1. Select **Address > Manage Address Forms** from the menu bar.
2. The Open Address Form window opens. Select the address form to be amended and click **Open**.

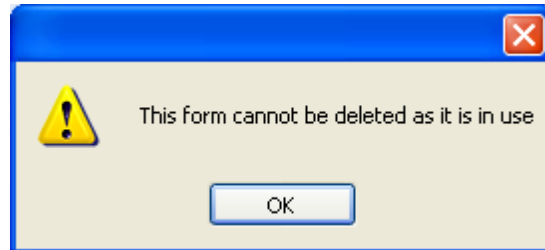


3. The form details for the selected address is shown. Make the amendments as required and click **Save** to update your amended product.

For more information on amending the address options see [Creating Address Forms](#)⁶² where the options are explained.

Deleting Address Forms

There may be occasions when an existing address form is no longer required. It is good housekeeping to remove forms that are no longer in use. As only one address form can be associated with a portal, an address form can not be deleted if it is in use. If you try to delete an address form that is assigned to a portal you receive a warning message, as shown below.



To remove an address form:

1. Log in to Skyline with Administrator rights and go to **Admin**.
2. In the Order section click **Select Address Form**.



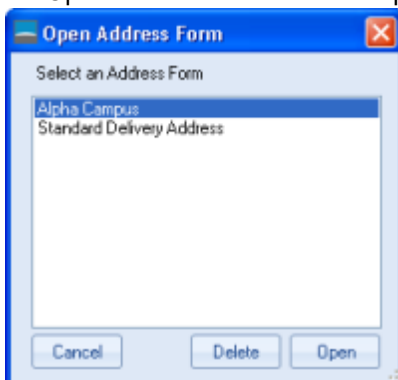
[Select Address Form](#)

Assign a delivery form to a portal

3. Make sure that the address form that you want to delete is not associated with the portal.



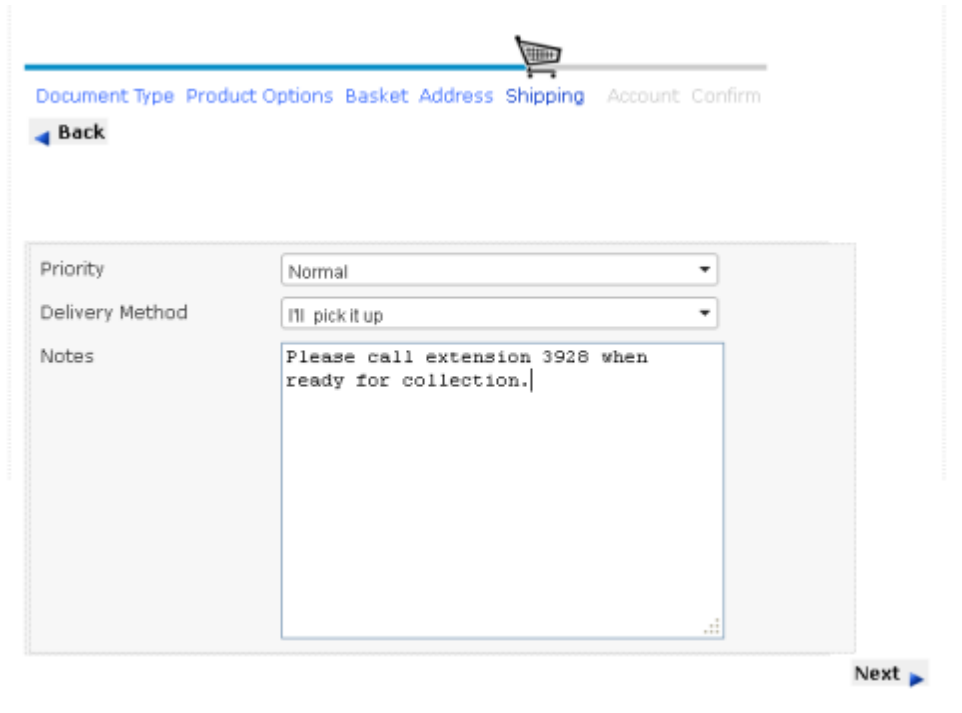
4. Open ProductManager.
5. Select **Address > Manage Address Forms** from the menu bar.
6. The Open Address Form window opens. Select the address form to be deleted and click **Delete**.



7. The selected address will be removed. Click **Cancel** to close the Open Address Form window.

Managing Delivery Forms

When a user places a print order they may be required to complete a shipping delivery form. You can amend the existing form or create a new one to collect the information that you require from your customers. The form can be updated and saved to your portal at any time. You can create many shipping delivery forms but only 1 shipping delivery form can be assigned to a portal at a time.



The screenshot displays the 'Shipping' step of a multi-page form in the Skyline ProductManager system. At the top, a navigation bar includes links for 'Document Type', 'Product Options', 'Basket', 'Address', 'Shipping' (the active step), 'Account', and 'Confirm'. A shopping cart icon is positioned to the right of these links. Below the navigation bar is a 'Back' button with a left-pointing arrow. The main form area contains three fields: 'Priority' with a dropdown menu set to 'Normal', 'Delivery Method' with a dropdown menu set to 'I'll pick it up', and 'Notes' with a text area containing the text 'Please call extension 3928 when ready for collection.' A 'Next' button with a right-pointing arrow is located at the bottom right of the form.

Creating Delivery Forms

Skyline is delivered with a default delivery shipping form which can be [amended](#)⁷² to fit your requirements. You can only have one delivery shipping form associated with a portal. However, if you have several portals, you can design a specific delivery shipping form to be associated with each portal.



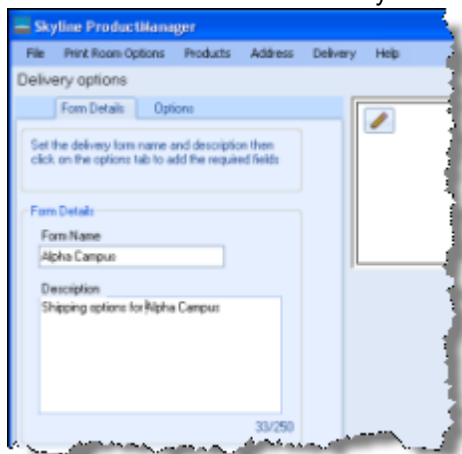
If a delivery form has not been associated with the portal an error message will show when you try to place an order.

Document name

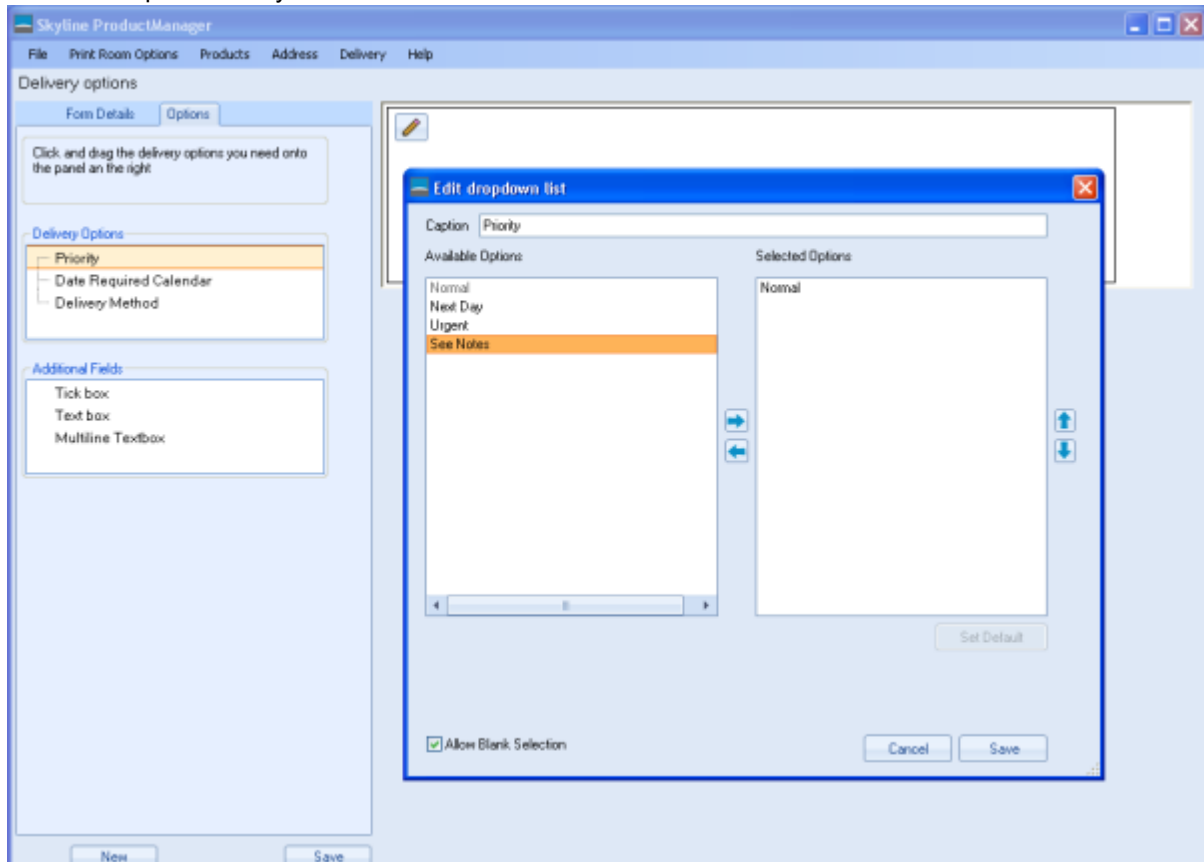
The system has not been configured. There are no delivery options selected.
Please contact the administrator

To create a new delivery shipping form:



1. Select **Delivery > New Delivery Form** from the menu bar.
2. Enter a name for the new delivery form and brief description.

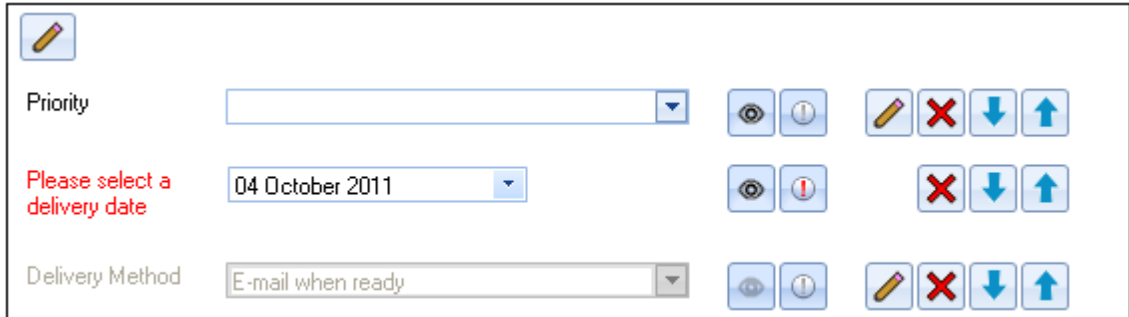






3. Click the **Options** tab. Drag and drop the required fields into the blank panel. Some of the delivery form options will give the user a drop down list of choices for them to select from, as shown in the example. Select the options that you want to include in the form field & click **Save**.



4. When you have added all your required delivery option fields you can use the following buttons to make any fields compulsory or make other amendments.

- If there is no choice that the end user has to make, the option can be made invisible. To make an option invisible click . The option is shown greyed out.
- If you want to make completion of the field compulsory click . The field name colour changes to red indicating that the field must be completed.



- Use  to edit the option. For example, you might want to add another delivery priority to the option.
- Use  to delete the option.
- Use   to amend the order that the options will appear in the delivery shipping form.

5. Click **Save** to save your new address form

Associating a Delivery Form

Delivery shipping forms can be created to offer different groups different delivery options. Local users may use a portal which offers a pick up only service, while users of offices further away may use a portal which offers postal or courier services.

When a new delivery shipping form has been created it can be associated with a Skyline portal. Only one delivery shipping form can be associated with a portal.



If a delivery form has not been associated with the portal an error message will show when you try to place an order.

Document name

The system has not been configured. There are no delivery options selected.
Please contact the administrator

To associate delivery shipping form to a Skyline portal:

1. Log in with Administrator rights and go to **Admin**.

 [View Basket \(0\)](#) | [Preferences](#) | [Downloads](#) | [Edit](#) | **[Admin](#)** | [Management](#) | [Logout](#)

2. In the Orders section click **Select Delivery Form**.



[Select Delivery Form](#)

Assign a delivery form to a portal

3. Select the delivery shipping form that you want to be used on the portal.

Use

<input checked="" type="radio"/>	Delivery Options
<input type="radio"/>	Alpha Campus

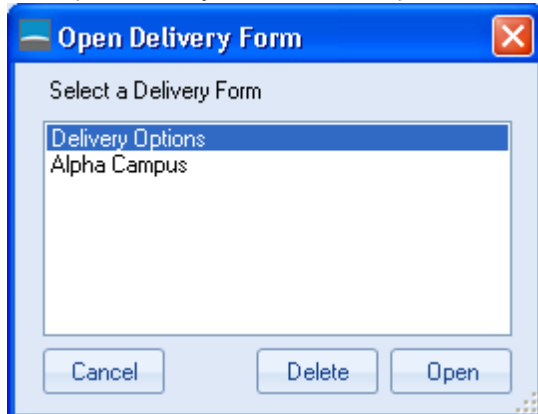
[Back](#)

Amending a Delivery Form

Skyline is delivered with a default delivery shipping form. This can be amended to include any fields that you require. Other Delivery forms can be created and modified at any time.

To amend a delivery shipping form:

1. Select **Delivery > Manage Delivery Forms** from the menu bar.
2. The Open Delivery Form window opens. Select the delivery shipping form to be amended and click **Open**.

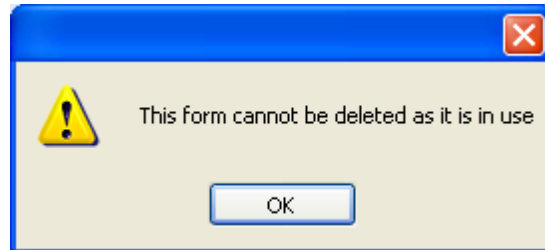


3. The form details for the selected delivery shipping is shown. Make the amendments as required and click **Save** to update your amended product.

For more information on amending the address options see [Creating Delivery Forms](#)⁶⁸ where the options are explained.

Deleting a Delivery Address

There may be occasions when an existing delivery shipping form is no longer required. It is good housekeeping to remove forms that are no longer in use. As only one delivery shipping form can be associated with a portal, a form can not be deleted if it is in use. If you try to delete a form that is assigned to a portal you receive an warning message, as shown below.



To remove a delivery shipping form:

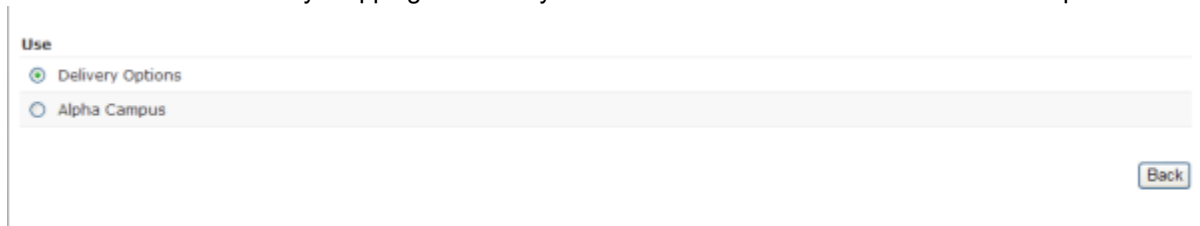
1. Log in to Skyline with Administrator rights and go to **Admin**.
2. In the Order section click **Select Delivery Form**.



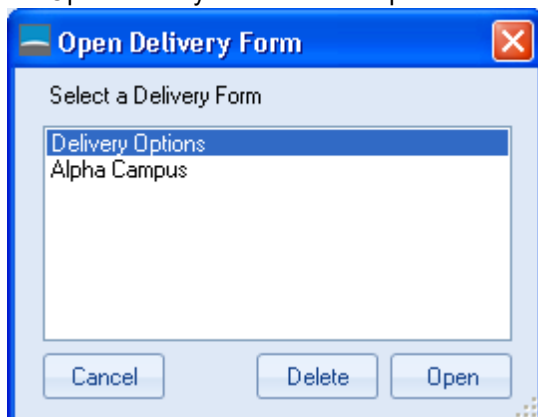
[Select Delivery Form](#)

Assign a delivery form to a portal

3. Make sure that the delivery shipping form that you want to delete is not associated with the portal.



4. Open ProductManager.
5. Select **Delivery > Manage Delivery Forms** from the menu bar when you are running ProductManager.
6. The Open Delivery Form window opens. Select the address form to be deleted and click **Delete**.



7. The selected delivery form will be removed. Click **Cancel** to close the Open Delivery Form window.

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