Catalog Administration

A guide to creating and managing Catalogs

Contents

A Note on Catalog Terminology

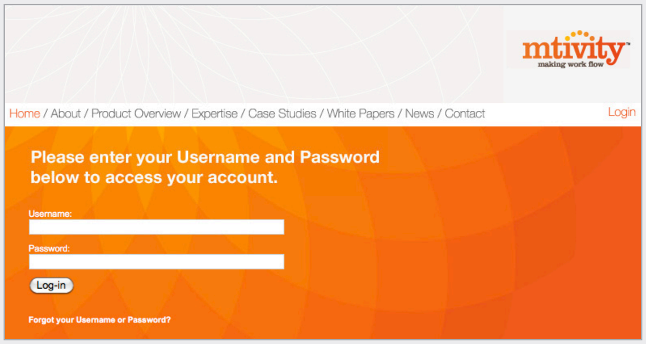
The Examples in this document may use Catalogue, Catalog or Campaign.

The name of this component may be personalized for your company - please contact Mtivity Support to make this change.

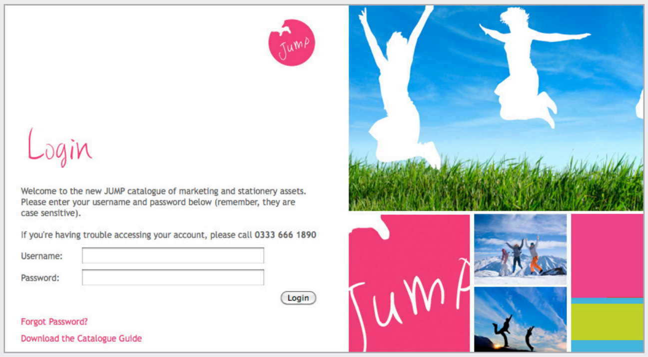
Getting Started

Accessing Mtivity

Mtivity can be accessed from any web browser connected to the internet.



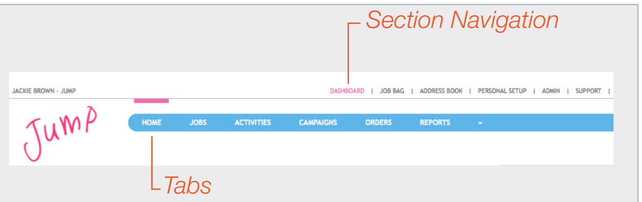
www.mtivity.com/DcLogin.csp



Custom login pages can also be created - see Zendesk Forums > Guides and Documentation for details

Navigation

Once inside the system, you will see two main areas of Navigation.



Section Navigation shows which main area of Mtivity you are in - the main sections you will use are;

- Admin - This is where your catalogs can be created and managed
- Dashboard - This is the consolidated data across all jobs
- Job Bag - When you are in this section the data you are viewing is for the selected job only.
- Personal Setup - This contains your personal settings and preferences, this is where you go to change your password or username

Tabs will change to reflect the objects available within each section. So, for example, once you click on the admin section, you will see the Catalog tab become available. The bar above the selected tab indicates your current location.

Roles & Licenses

To administer catalogs you should be assigned the following licenses:

- Professional User License
- Catalog Manager License

If you can't see the Admin section or the Catalogs tab, you do not have the correct role or license - contact your company administrator who will be able to assign you the appropriate permissions.

Support

Mtivity's support desk is available from 09:00 AM to 17:30 PM, Monday - Friday (excl. public holidays).

- **Telephone**: +44 (0)20 7397 2910 (UK)
  1 (585) 200 3151 (USA)
- **Email**: support@mtivity.com
- **Skype**: mtivity.support

Items

Creating Files, Pricing and Items

An Item can be considered as a product, or piece of print that your client can order. There is no restriction on what sort of products may be ordered, for example, Mtivity currently contains items as diverse as brochures, business cards, promotional objects such as key rings or caps, videos, and downloadable logos.

There are three ‘types’ of item within Mtivity - each with a different purpose;

- **Downloadable** - this allows your clients to download the item at no cost. These items are generally used for electronically distributed collateral and brand assets.
- **From Stock** - this will generally be fulfilled from a warehouse of pre-printed stock with no production activity required.
- **Make to Order** - this will usually need to go through a production process such as printing. These items may also be personalized by your clients if needed.
- **Book** - this is a group of PDFs (chapters) from which the client can select applicable ones. The system will then compile these into a ‘book’, which goes through the production process. If you would like to enable Book Items for your company, please contact Mtivity Support.

Components of an Item

An Item will generally need to contain two other components:

File - This is the print template, or if not for print, the visual representation of the item

Pricing - An item’s pricing is managed through materials, these then need to be selected when creating your item. This allows pricing details to be re-used by multiple items.

Pricing

An item’s pricing is managed through materials - in addition to the cost, a material also contains information on who supplies the material, what quantities it’s shipped in, and what the delivery time is. A material or group of materials are linked to items through their respective Item Pricing sections.

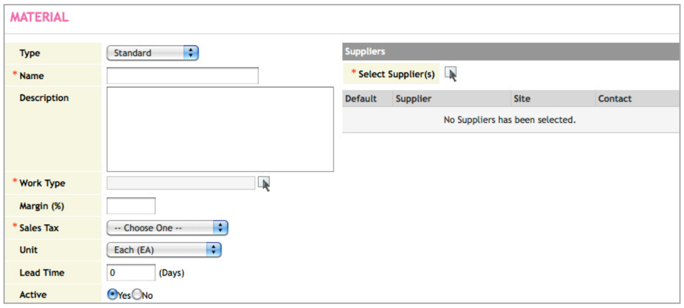
Once an order is placed by your client, each material will be directed to its supplier in the form of a Purchase Order and Production Activity. If one vendor supplies multiple items (materials) from an order, these will be amalgamated into a single Purchase Order and Production Activity.

Multiple pricing options may be defined against Items, from which one can be selected by your client when ordering the Item. This can be used to allow your client to select a variation of an Item - for example a size, production method, finish or stock. As each variation may have different materials the price will update according to the option selected by the client.

Creating Materials

Location: Admin > Organization > Materials

1. From the Materials page, click New in the Tools menu on the right hand side.



2. From the Type menu, select Standard if your supplier is a third party, or Internal Supply if it is produced internally.

3. The Name and Description will display to the supplier - your client will not see this information.
4. The Margin is a percentage increase that will be applied to the material's cost. Your suppliers will see the cost price in their purchase orders and your clients will see the cost price plus margin when ordering an Item.
5. Select the Sales Tax that will be applied
6. The Lead Time is the number of days that the Material will take to be produced. This displays to the Client when they order the Item that contains this Material. Mtivity is working day aware, so weekends are not counted in the estimated delivery dates.
7. From the Suppliers section on the right hand side, click the Contact Selection Tool ( ) to select the vendor. If you wish to give your client a choice from a set of vendors, you can select multiple contacts.
8. The Pricing Details section at the bottom of the screen allows you to input a quantity and cost matrix. Once the Material is associated with the Item, these are the quantities and prices (plus Margin) that your client will be able to order. See *Pricing Examples* below for more information.
9. When you're done, click Save

Pricing Examples

	Qty	Cost ($)	Run On	Cost ($)	Shipping ($)
* Qty 1	100	1000.00			
Qty 2	200	2000.00			
Qty 3	300	3000.00			

Here your client will only be able to order one of three quantities - 100, 200 or 300, costing $1000.00, $2000.00, and $3000.00 respectively.

	Qty	Cost ($)	Run On	Cost ($)	Shipping ($)
* Qty 1	100	1000.00	100	1000.00	

In this example, a Run On of 100 has been entered. This means that your client is able to order any quantity of items in multiples of 100. Because the first Quantity is 100, that is the minimum orderable amount, there is no maximum.

	Qty	Cost ($)	Run On	Cost ($)	Shipping ($)
* Qty 1	100	1000.00	100	1000.00	
Qty 2	10000	10,000.00			

This example is the same as above except that a maximum orderable quantity of 10000 has been set.

Pricing Examples Continued

	Qty	Cost ($)	Run On	Cost ($)	Shipping ($)
* Qty 1	100	1000.00			50.00
Qty 2	200	2000.00			100.00
Qty 3	300	3000.00			150.00

This example is the same as the first except the Shipping column has an entry for each Quantity band. This is a fixed fee that is applied to each order, so for example, if 100 were ordered this would cost your client the $1000.00 from the Cost column, plus the $50.00 from the Shipping column, totalling $150.00.

Flat Rate	☑
Allow Partial Qty	☐ Partial quantities may be used only in Job Bag Budget and Purchase Orders.
* Cost ($)	15.00

This is a Flat Rate Material, It is typically used as a 'per order cost' in conjunction with a standard Material. When you associate Materials to an Item, you are able to select one standard Material and an unlimited number of Flat Rate Materials.

Adding Materials to Items

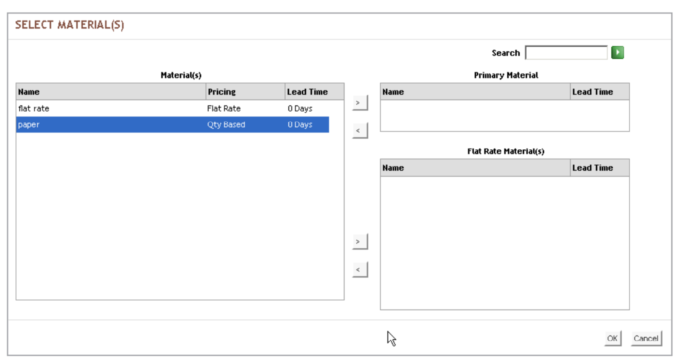
Location: Admin > Catalogs > Items

1. From the New/Edit Item page, scroll down to the Item Pricing section. There will always be a 'Standard' option (unless this has been changed by your Catalog Manager).

Item Pricing — Add Pricing Option

Default	Option	Material(s)	Units	Lead Time	
☑	Standard				Select Materials | Remove Option

2. Click the Select Materials link, this will open the materials Selection Tool.

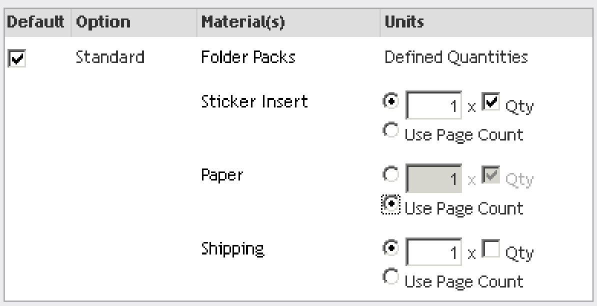


3. Select the material you wish to associate with the item by moving it to the Primary Material box on the right hand side. A primary material will dictate the quantities available to order. If no additional flat rate materials are added this will also define, the total cost, lead time and supplier of the item.

4. You may associate any additional flat rate materials by moving them to the Flat Rate Materials box on the right hand side. You will be able to define Qty options for the flat rate materials when you return to the item screen. See *Flat Rate Units* for more information.
5. Click OK to close the window and return to the item screen.

Flat Rate Units

Below shows an item's pricing with 4 materials added. Folder Packs is a qty based primary material, this means that it will dictate the quantities that may be ordered by your client. Sticker, Paper and Shipping are three flat rate materials that will also be added to any orders for this item



Default	Option	Material(s)	Units
☑	Standard	Folder Packs	Defined Quantities
		Sticker Insert	◉ 1 x ☑ Qty ○ Use Page Count
		Paper	○ 1 x ☑ Qty ◉ Use Page Count
		Shipping	◉ 1 x ☐ Qty ○ Use Page Count

The price for ***Sticker Insert*** *is set to be applied once for the qty of items ordered. So if the price for a sticker was 5 cents and 10 packs were ordered, 50 cents would be added to the cost of the order.*

The price for ***Paper*** *is set to be determined by the page count of the item. So if the price for Paper is 2 cents and the item is 10 pages long, 20 cents will be added to every item ordered.*

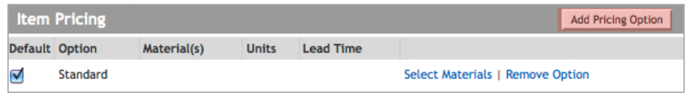
Finally, ***Shipping*** *is set to be applied once to the order, regardless of how many items are ordered.*

Adding Multiple Pricing Options to an Item

Location: Admin > Catalogs > Items

You can offer your client a choice of variations on price by creating multiple options in the Item Pricing section. If more than one option is defined, your client will be able to select one from a dropdown menu when ordering the Item.

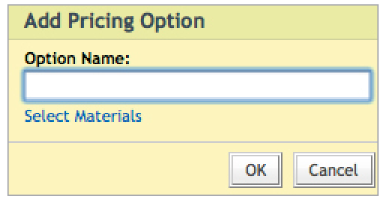
1. From the New or Edit Item page scroll down to the Item Pricing section.
2. Click the Add Pricing Option button.



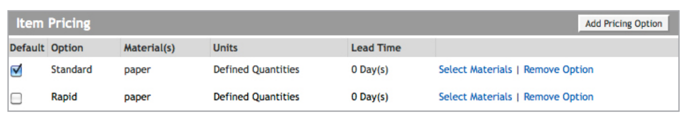
Item Pricing — Add Pricing Option

Default	Option	Material(s)	Units	Lead Time	
☑	Standard				Select Materials | Remove Option

3. This will open the Add Pricing Option window.



4. Give the option a Name, this is what will appear to your client in the dropdown menu. If you intend to reuse a particular pricing option across multiple items, you can create it in the Pricing Options sub tab - options created there are available for use on all items.
5. Click the Select Materials link to add a material to the option.
6. Click the OK button to create the option.



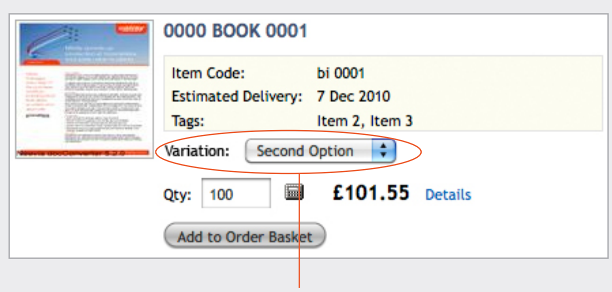
Item Pricing — Add Pricing Option

Default	Option	Material(s)	Units	Lead Time	
☑	Standard	paper	Defined Quantities	0 Day(s)	Select Materials | Remove Option
☐	Rapid	paper	Defined Quantities	0 Day(s)	Select Materials | Remove Option

7. The Default checkbox to the left of the options will ensure that the selected option is pre-selected when the client browses the catalog.

A Client's View of Pricing Options

Below is how your client would view an Item with multiple Pricing Options.



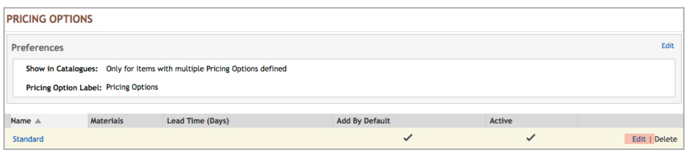
The Pricing Options will appear above the Qty selection area. In this example the Pricing Option has been given a label of 'Variation'

Setting Reusable Pricing Options

Location: Admin > Catalogs > Pricing Options

You can set default Materials and/or options on new Items by adding these in the Pricing Options sub tab. Settings defined here are automatically applied to all new items (although they can be deleted or changed when creating the item). This saves you having to select Materials or add options every time you create an Item.

1. Go to the Pricing Options sub tab in the Catalogs area. This displays your default pricing that is used for all new Items. All companies will have a 'Standard' option.
2. Click the Edit link next to the Standard Item. This will take you to the Edit Pricing Option screen.



3. Here you can select the Material(s) that you wish to be automatically applied to all new Items.
4. You may also change the name of the option, but this will only be seen by the client if they can select from multiple Pricing Options.
5. When done, click the Save button.

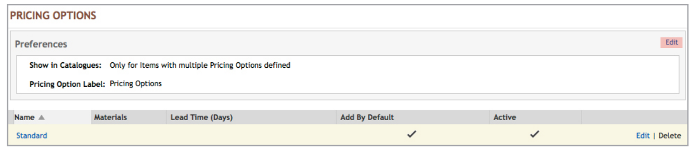
Note: From this screen you can also create new Pricing Options which can be set to be added by default to all new Items. Use the Add By Default checkbox to ensure your options are pulled through automatically, if you do not wish them to be added by default, they will still be available for selection from the new Item screen.

Changing the Label of Pricing Options

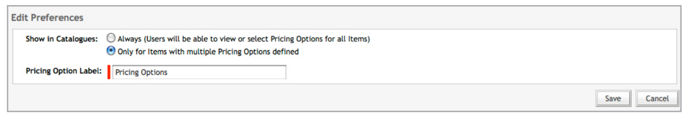
Location: Admin > Catalogs > Pricing Options

If you intend to offer your clients the option of selecting a variation when ordering an item, you may want to change the label that appears to them *(see A Client's View of Pricing Options above)*.

1. In the Pricing Options sub tab, you will see a preferences box at the top of the page.
2. Click the Edit link, this will change the Preferences to edit mode.



3. Here you can enter the Pricing Options Label that will appear to your clients. Selecting Always in the Show In Catalogues setting will display this label along with the Item Pricing Name for ALL items (even if selection is not available).



4. Click the Save button to commit your changes.

Note: At this stage the Pricing Option label applies to all Items that use multiple pricing, but this will be updated in the future to allow the label to be set at an Item level. In the meantime, Mtivity suggests using something generic such as 'Variation' or 'Option'.

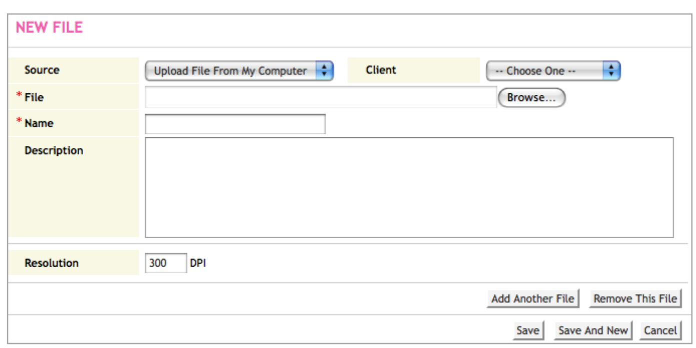
Files

The Primary File is the basis of an item, it can also be thought of as a template. If the Item type is Stock or Make to Order, it is the file that is passed on to the printer - this must be a PDF. If the item type is Download, it is the file that your client downloads - this can be any file type. All items must have a Primary File.

Uploading Files

Location: Admin > Catalogs > Files

1. Click New in the Tools menu on the right hand side. This will open the New File window.



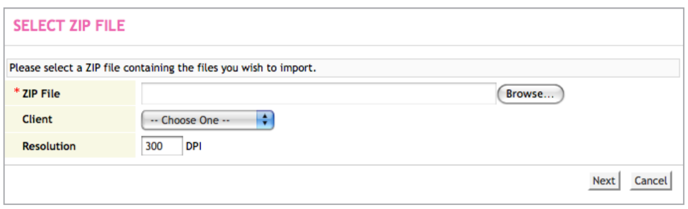
2. Select your client - this will help when locating files later.

3. Click the Browse button on the File field, this will allow you to select the file you wish to upload.
4. You can add multiple files by clicking the Add Another file button, or just click Save to start uploading.
5. Once your file has uploaded it will be available for selection immediately but the automatically created thumbnail and preview images may take a few seconds to render.

Importing Multiple Files From Zip

Location: Admin > Catalogs > Files

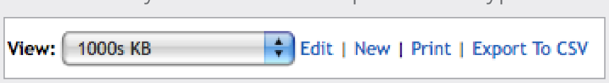
1. Click Import from Zip in the Tools menu on the right hand side. This will open the Select Zip File window.



2. Click the Browse button on the Zip File field, this will allow you to select the file you wish to upload.
3. Select your client - this will help when locating files later.
4. Click Next to proceed to the next step.
5. The system will scan the zip file and detail the files to be uploaded. Once you have confirmed these are the files you wish to upload, click the Upload Now button.

Finding Files

At the top of the File listing page you will see a View menu. Try creating a new View or editing an existing one as a more efficient way to browse your files - for example, you can edit a View to only show files of a particular type.



Bulk Import of Files

Location: Admin > Data Management

It is possible to bulk import Catalog Files using FTP and CSV import. The files that you want to import can be placed in your FTP folder, and the full FTP location can be specified in the CSV file.

You may also bulk delete or edit details of files with the CSV Import function.

To set up a FTP folder for your company please contact Mtivity Support.

Downloadable Items

A Downloadable Item has no production process or cost associated with it. It is generally used to allow client's to download brand assets, guidelines and documentation instantly.

Creating a Downloadable Item

Location: Admin > Catalogs > Items

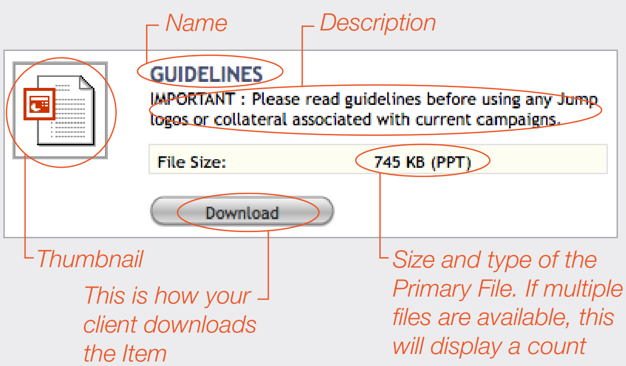
1. Click New Download Item in the Tools menu on the right hand side. This will open the New Download Item screen.
2. The Name will appear to your clients so call it something that they will understand.
3. If you have a unique code for this Item you can enter it in the item Code field. Your clients can search on this code too.
4. If you want to add some more information about this Item you can do so in the Description field - your clients will be able to see this.
5. Click the Selection Tool ( ) on the Primary File field to select the file that your client will download. Notice how the Thumbnail automatically updates? If you wish to change this, click the Change link and select another file.
6. The Preview setting allows your client to view a preview PDF of the Primary File in their browser.
7. Its generally a good idea to select your client from the Client menu - this makes objects easier to find later.
8. If an item is set to non-active, it does not display to your client, this is a handy way of taking an item offline if changes need to be made.
9. You can make multiple files available for your client to download by selecting Associated Files. To do this click the Selection Tool ( ), select your files,

then make sure the Client Visible checkbox is ticked.

10. If you wish to associate Metadata with your Item you can do so here - see the Metadata section below for more information.
11. Click the Save button to create your Downloadable Item.

A Client's View of a Downloadable Item

Below is how your client would view a Downloadable Item when browsing their Catalog.



Stock Items

A Stock Item is generally fulfilled from a depository such as a warehouse, unlike a Downloadable Item it must have a Material associated with it.

Creating a Stock Item

Location: Admin > Catalogs > Items

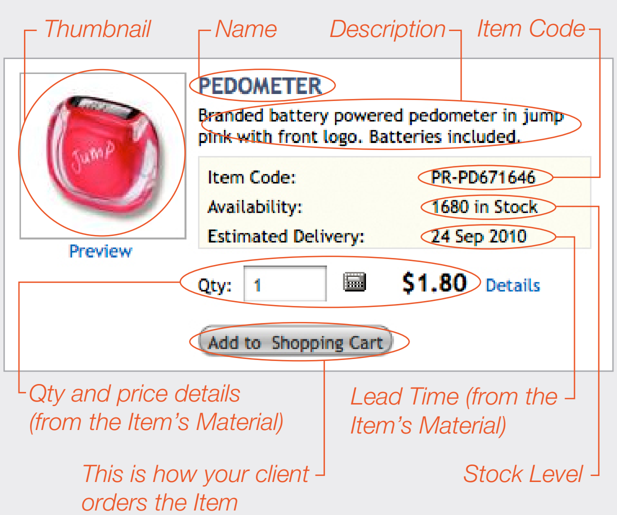
1. Click New Stock Item in the Tools menu on the right hand side. This will open the Stock Item screen.
2. The Name will appear to your clients so call it something that they will understand.
3. If you have a unique code for this Item you can enter it in the Item Code field. Your clients can search on this code too.
4. If you want to add some more information about this Item you can do so in the Description field - your clients will be able to see this.
5. Click the Selection Tool ( ) on the Primary File field to select the PDF or artwork that your client is ordering. Notice how the Thumbnail automatically updates? If you wish to change this, click the Change link and select another file. If you have a File Reference Number you can input that instead of selecting a file.
6. The Preview setting allows your client to view a preview PDF of the Primary File in their browser.
7. You can enter your stock information now - initially all items will have zero stock, you will need to add stock after saving the Item.
8. Once the stock level reaches a the Restock Alert Qty you can send an alert - this is an email that gets sent to your supplier and/or manager detailing the stock levels. If you enter a Restock Order Qty, this will be included in the alert email requesting restocking.
9. Restock Lead Time is the number of days it will take to replenish your stock. If Back Orders are allowed this will be added to give your Client an estimated delivery date.
10. Display Stock Level will show the current stock levels to your clients. If you have this set to No, your client will simply see a 'In Stock' message.
11. Back Orders allow your clients to place orders for the item even if it is out of stock. If Back Orders are allowed, the Restock Lead Time will be added to the Material's Lead Time to give your Client an Estimated Delivery Date.
12. You can allow Reservations for Stock Items - this will enable your clients to reserve the item in their order basket for the set number of hours, which will deduct the ordered quantity from the available stock.
13. If your materials have multiple suppliers associated with them, you can let your client select one when placing their order.
14. Delivery Date Amendment will allow your client to request an earlier delivery date. When an Order is placed, the Purchase Order will go through to the supplier with the newly requested date, your supplier will have the opportunity to accept or decline the PO.
15. A Job Ticket will usually be sent in plain TXT format, however, If your supplier is JDF enabled you may choose to use JDF formatted tickets.
16. After your client places an order, a Purchase Order is created. This must be sent and accepted for the

job to progress. Some companies prefer to send this manually as a final check, but most prefer this to be done automatically as human intervention tends to slow the process down. Mtivity recommends applying a Workflow to the Catalog as a whole - this can be set to Send and Accept Purchase Orders automatically and saves having to make these settings on an individual Item level. A Workflow will override the Purchase Order settings made at an Item level.

17. Its generally a good idea to select your client from the Client menu - this makes objects easier to find later.
18. If an item is set to non-active, it does not display to your client, this is a handy way of taking an item offline if changes need to be made.
19. Select your Item Pricing to define the Item's pricing, estimated delivery date, available quantities and supplier. See the *Pricing* section above for more information.
20. Associated Files can be passed on to your clients and suppliers. This is usually used for original or supporting documents. To do this click the Selection Tool ( ) and select your files.
21. If you wish to associate Metadata with your Item you can do so here - see the *Metadata* section below for more information.
22. Click the Save button to create your Stock Item.

A Client's View of a Stock Item

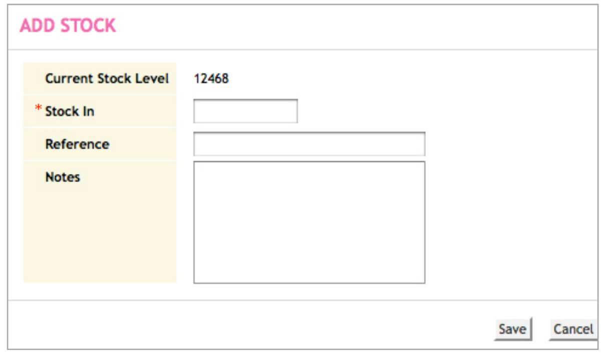
Below is how your client would view a Stock Item when browsing their Catalog.



Adding Stock

Location: Admin > Catalogs > Items > Stock Item

1. Click the Add Stock link next to the In Stock field. This will open the Add Stock window.

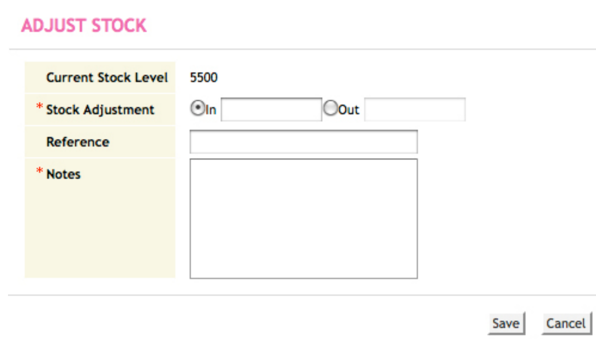


2. Enter the amount of stock you want to add
3. If necessary, you may also add a Reference and any Notes.
4. Click the Save button to add your stock.

Adjusting Stock

Location: Admin > Catalogs > Items > Stock Item

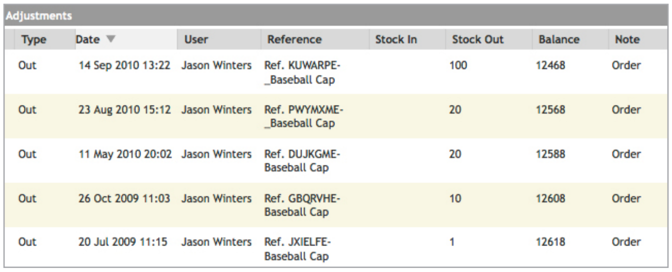
1. Click the Adjust Stock link next to the In Stock field. This will open the Adjust Stock window.



2. If you are adding Stock, enter the adjustment in the Stock In field, if you are subtracting, use the Stock Out field.
3. When adjusting stock it is mandatory to leave a Note or reason for the adjustment.
4. Click the Save button to make the adjustment.

Viewing Stock Adjustments

Location: Admin > Catalogs > Items > Stock Item



Adjustments

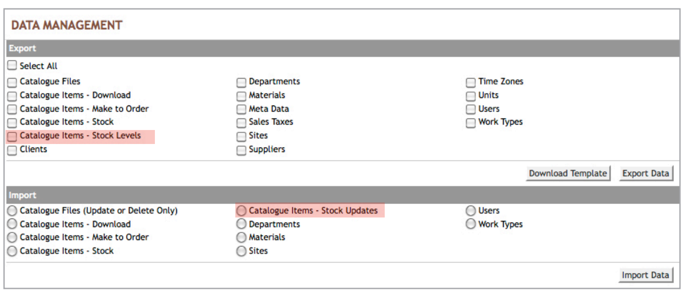
Type	Date	User	Reference	Stock In	Stock Out	Balance	Note
Out	14 Sep 2010 13:22	Jason Winters	Ref. KUWARPE-_Baseball Cap		100	12468	Order
Out	23 Aug 2010 15:12	Jason Winters	Ref. PWYMXME-_Baseball Cap		20	12568	Order
Out	11 May 2010 20:02	Jason Winters	Ref. DUJKGME-Baseball Cap		20	12588	Order
Out	26 Oct 2009 11:03	Jason Winters	Ref. GBQRVHE-Baseball Cap		10	12608	Order
Out	20 Jul 2009 11:15	Jason Winters	Ref. JXIELFE-Baseball Cap		1	12618	Order

When viewing a Stock Item's details page, the Adjustments table will display all Stock In and Out calculations.

Export/Import Stock Levels

Location: Admin > Data Management

In the Data Management area you can export a CSV of your current stock levels across all Stock Items. You can also use the import function to update stock levels, this saves you having to manually navigate to each Item to make changes.



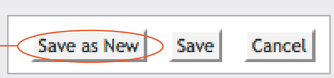
Copying Items

It is often more convenient to make a copy of an existing Item rather than creating a new one from scratch.

To do this, simply edit the Item you wish to make a copy of, change the name (as well as any other details) then click the Save as New button.

This will also copy any customizations that have been created.

Save as New will create a copy



Make to Order Items

A Make to Order Item will usually need to go through a production process such as printing. These items may also be personalized by your clients if needed.

Creating a Make to Order Item

Location: Admin > Catalogs > Items

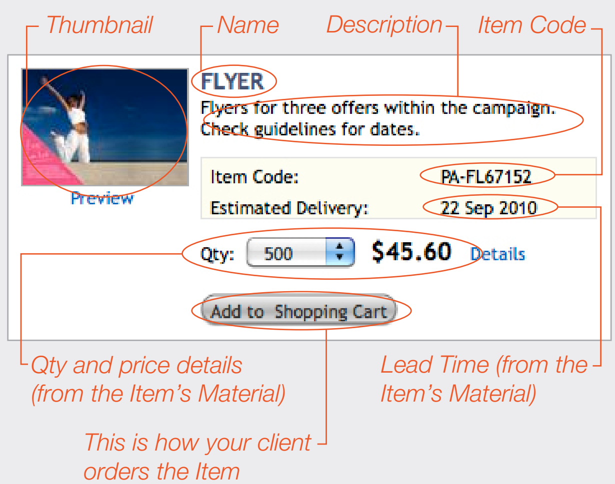
1. Click New Make to Order Item in the Tools menu on the right hand side. This will open the new Make to Order Item screen.
2. The Name will appear to your clients so call it something that they will understand.
3. If you have a unique code for this Item you can enter it in the Item Code field. Your clients can search on this code too.
4. If you want to add some more information about this Item you can do so in the Description field - your clients will be able to see this.
5. Click the Selection Tool ( ) on the Primary File field to select the PDF or artwork that your client is ordering. Notice how the Thumbnail automatically updates? If you wish to change this, click the Change link and select another file. If you have a File Reference Number you can input that instead of selecting a file.
6. The Preview setting allows your client to click the thumbnail to view a preview PDF of the Primary File in their browser.
7. The Printing setting is passed onto the supplier in the Job Ticket - this is just used for information, it will not make any alterations to the PDF artwork.
8. When your client is placing their order for this Item you can set whether they can upload a file, this can be used for a variety of purposes such as a translation file or list of addresses to send the output to. The Send to Supplier checkbox will ensure that the vendor also has access to the uploaded file.
9. You can select whether to allow your clients to download the customized PDF, if so, you can select further Adobe Acrobat security settings such as allowing editing, printing, password protection, or stamping the PDF with a 'PROOF' security watermark.

10. If the Material that you select for this Item has multiple Suppliers, you can select whether or not to allow your client the option of selecting which Supplier they would like to fulfill the order.
11. Delivery Date Amendment will allow your client to request an earlier delivery date. When an Order is placed, the Purchase Order will go through to the Supplier with the newly requested date, your Supplier will have the opportunity to Accept or Decline the Order.
12. A Job Ticket will usually be sent in plain TXT format, however, If your supplier is JDF enabled you may choose to use JDF formatted tickets.
13. After your client places an order, a Purchase Order is created. This must be sent and accepted for the job to progress. Some companies prefer to send this manually as a final check, but most prefer this to be done automatically as human intervention tends to slow the process down. Mtivity recommends applying a Workflow to the Catalog as a whole - this can be set to Send and Accept Purchase Orders automatically and saves having to make these settings on an individual Item level. A Workflow will override the Purchase Order settings made at an Item level.
14. Its generally a good idea to select your client from the Client menu - this makes objects easier to find later.
15. If an item is set to non-active, it does not display to your client, this is a handy way of taking an item offline if changes need to be made.
16. Select your Item Pricing to define the Item's pricing, estimated delivery date, available quantities and supplier. See the *Pricing* section above for more information.
17. Associated Files can be passed on to your clients and suppliers. This is usually used for original or supporting documents. To do this click the Selection Tool () and select your files.
18. If you wish to associate Metadata with your Item you can do so here - see the *Metadata* section below for more information.
19. Click the Save button to create your Item.

Once your item has been created you can add customizations - see the *Customizations Guide* for more information.

A Client's View of a Make to Order Item

Below is how your client would view a Make to Order Item when browsing their Catalog.



Book Items

A book item allows you to upload a number of chapters against the Item. Your client can tailor the item to include only required chapters. Placing an order will compile the book with the selected chapters.

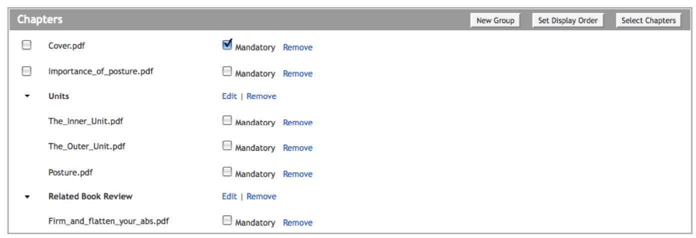
If you would like to enable Book Items for your company, please contact Mtivity Support.

Creating a Book Item

Location: Admin > Catalogs > Items

1. Click New Book Item in the Tools menu on the right hand side. This will open the new Book Item screen.
2. The Name will appear to your clients so call it something that they will understand.
3. If you have a unique code for this Item you can enter it in the Item Code field. Your clients can search on this code too.
4. If you want to add more information about this Item you can do so in the Description field - your clients will be able to see and search on this.
5. Specify the fields Revision Number, Release Number and Release Date if any.

6. The Preview setting allows your client to click the thumbnail to view a PDF of the Book's chapters.
7. You can select or upload a Thumbnail image by clicking the Change link.
8. You can specify if you want printing on one side or both sides of the book's pages. Furthermore, if two sided is chosen, you can specify if chapters need to begin on an odd page. This will mean that a blank page will be inserted if necessary to ensure that chapters will start on an odd page.
9. When your client is placing their order for this Item you can set whether they can upload a file, this can be used for a variety of purposes such as a translation file or list of addresses to send the output to. The Send to Supplier checkbox will ensure that the vendor also has access to the uploaded file.
10. You can select whether to allow your clients to download the customized PDF, if so, you can select further Adobe Acrobat security settings such as allowing editing, printing, password protection, or stamping the PDF with a 'PROOF' security watermark.
11. If the Material that you select for this Item has multiple Suppliers, you can select whether or not to allow your client the option of selecting which Supplier they would like to fulfill the order.
12. Delivery Date Amendment will allow your client to request an earlier delivery date. When an Order is placed, the Purchase Order will go through to the Supplier with the newly requested date, your Supplier will have the opportunity to Accept or Decline the Order.
13. A Job Ticket will usually be sent in plain TXT format, however, If your supplier is JDF enabled you may choose to use JDF formatted tickets.
14. After your client places an order, a Purchase Order is created. This must be sent and accepted for the job to progress. Some companies prefer to send this manually as a final check, but most prefer this to be done automatically as human intervention tends to slow the process down. Mtivity recommends applying a Workflow to the Catalog as a whole - this can be set to Send and Accept Purchase Orders automatically and saves having to make these settings on an individual Item level. A Workflow will override the Purchase Order settings made at an Item level.
15. It's generally a good idea to select your client from the Client menu - this makes objects easier to find later.
16. If an Item is set to non-active, it does not display to your client, this is a handy way of taking an item offline if changes need to be made.
17. Click the Select Chapters button to add a number of PDFs to the Book Item. The selected files for Book Items must all be the same page size. After selecting your Chapters, you can specify if one is required by clicking the Mandatory checkbox to the right of the Chapter's name. A Chapter marked as mandatory cannot be excluded by the end user when ordering the Book. To re-order the selected Chapters, click the Set Display Order button. For more information on Chapters see *Grouping Chapters* below.

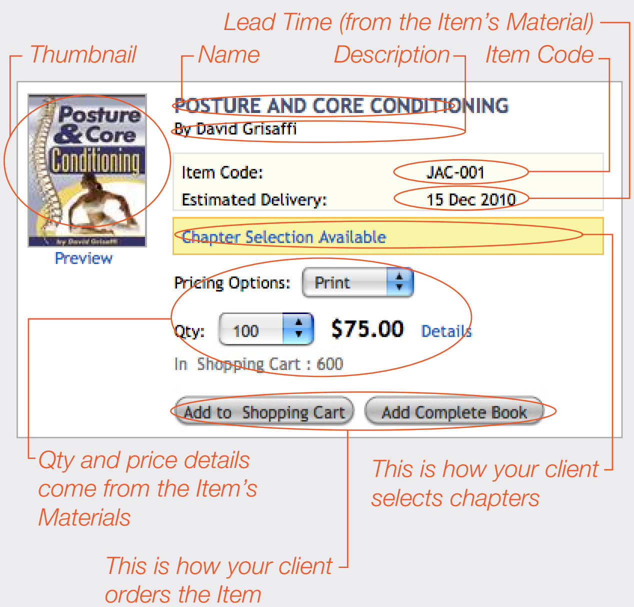


18. Select your Item Pricing to define the Item's pricing, estimated delivery date, available quantities and supplier. See the *Pricing* section above for more information.
19. Associated Files can be passed on to your clients and suppliers. This is usually used for original or supporting documents. To do this click the Selection Tool ( ) and select your files.
20. If you wish to associate Metadata with your Item you can do so here - see the *Metadata* section below for more information.
21. Click the Save button to create your Book Item.

Once your item has been created you can add customizations - see the *Customizations Guide* for more information.

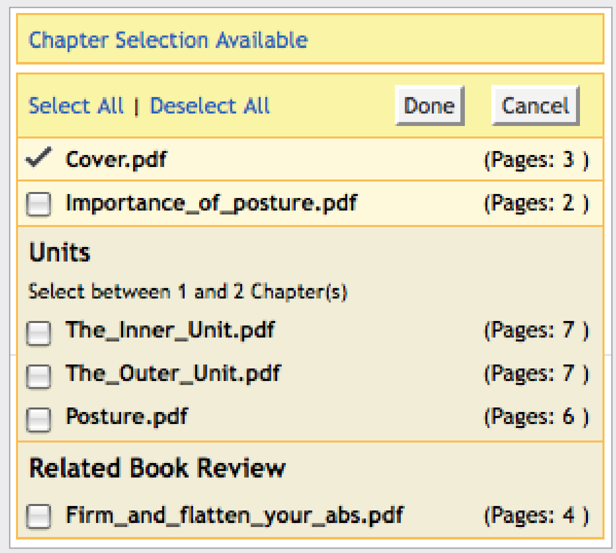
A Client's View of a Book Item

Below is how your client would view a Book Item when browsing their Catalog.



A Client's View of Chapter Groups

Below is how your client would make Chapter selections. In this example Cover is mandatory, it and Importance of Posture, are not in a Group. Units is a Group containing The Inner Unit, The Outer Unit, and Posture. There is another Group named Related Book Review that contains the Firm and Flatten Your Abs section. The client opens the selection tool by clicking the Chapter Selection Available box above.



Grouping Chapters

Location: Admin > Catalogs > Items

You can split the selected Chapters into Groups to ensure there is a logical separation of Chapters. To do this, select the Chapters you wish to group using the checkbox to the left of its name, then click the 'New Group' button. The Group name will appear to your client. Within each group you can also specify if there is a minimum or maximum number of chapters that must be ordered from that group.

Rather than selecting Chapters first and then adding them to a Group, you may find it quicker to do this in one step. If you just click the New Group button without selecting Chapters first, you will be able to select the Files you wish to import by clicking the Select Chapters link.

To add Chapters to an already created Group, select the Chapters you wish to add, then click the Edit link next to the Group that you are adding the Chapter to.

Customizations and Book Items

Location: Admin > Catalogs > Items

Customizations essentially work the same way as with Make to Order Items, however there is one very important difference: customizations are applied at the file level, meaning that if the file is used across Items, the customization that were defined on the first Item would be inherited by the others. A good example of this is a cover: you may have a series of training manuals that all use the same cover template with customized titles or course information. Rather than having to define the customizations multiple times across the manuals, you only need to do so once and all instances of that cover will use the same customizations.

Customizations are added to Book Items on the view screen, using the links to the right of the Chapter names.

See the *Customizations Guide* for more information.

Renaming Chapters

Location: Admin > Catalogs > Files

A Chapter's name is taken directly from it's PDF file. To change it's name you should edit the PDF's name that it is associated with. This can be accomplished in either the Files area, or for bulk updates use File Import in the Data Management area.

Setting Chapter Selection Permissions

Location: Admin > Catalogs > Publish

Book Items have an extra set of permissions which allow you to set whether your client can select chapters or not. When the client can't select chapters, they will not see the tool to do so, and their order will always be for the whole book.

See the *Publishing a Catalog With Book Items* section for information on setting chapter selection permissions.

Metadata

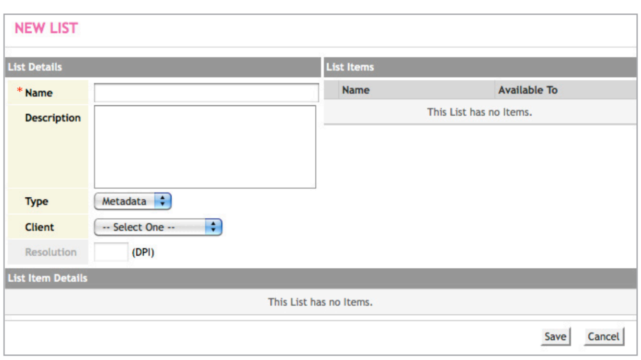
Metadata describes further information about an Item and its contents. For example, a Postcard may contain Metadata that details it's finishing, regional information, sizing, campaign details etc. Your clients will be able to search and filter on any Metadata tags that have been associated with any Items in their Catalog.

In Mtivity, this information is created using a Metadata List, the list contains a number of tags that may then be associated with an Item.

Creating a Metadata List

Location: Admin > Catalogs > Lists

1. Click New in the Tools menu on the right hand side. This will open the New List screen.



2. Give the List a name, this may appear to your clients so should be something descriptive such as Size or Region.
3. The Description is just for your reference and will not appear to your clients.
4. Metadata should be selected from the Type menu.
5. If your list is to be associated with a certain client, its good practice to select them from the Client Menu.
6. Before Metadata Tags can be added to your List, it needs to be saved, so click the Save button.

Adding Items to a Metadata List

Location: Admin > Catalogs > Lists

Think of your List as a container or folder, now that its created Tags (Items) may be added to it.

1. Click Add Item in the Tools menu on the right hand side.

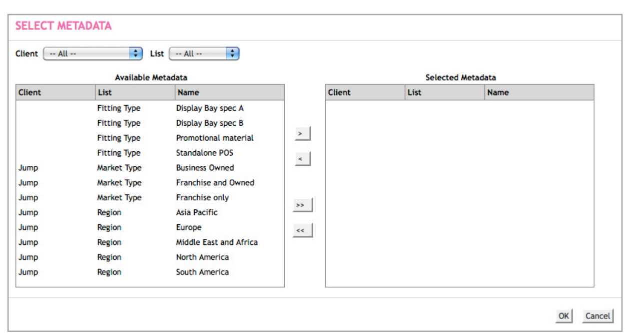
2. You simply need to enter the tag in the Name field.
3. Generally you will want to create multiple tags for the list, so its best to click the Save as New button. This will save the entered text and immediately allow you to enter another Tag.

Associating Metadata Tags to an Item

Location: Admin > Catalogs > Items

You associate Metadata with an Item by Editing the Item (or whilst creating a new Item).

1. In the Metadata table near the foot of the page, click the Select Metadata icon (). This will open the Metadata Selection Tool

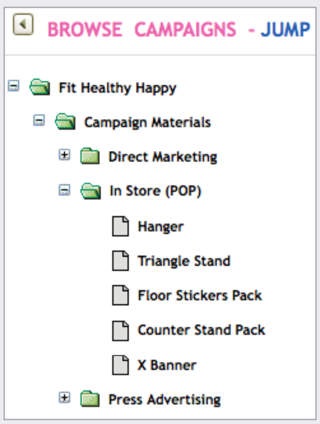


2. You can select the tags you wish to associate with the Item by double clicking them or using the arrow buttons to move them across to the right.
3. Once you have made your selection, click the OK button to associate the Tags to the Item.

Navigating a Catalog

The quickest way to locate an Item in the Catalog Admin area is to perform a search from the Items list page.

However, rather than locating Items from the list page, it may be easier to find them using the tree structure menu of a Catalog. Use this to navigate through the Catalog by expanding folders and clicking on the appropriate icon. When you click on a Item you will be taken directly to it's specific details page. You can find this functionality on the Catalog's details page using the arrow icon to the left of the Catalog's name.



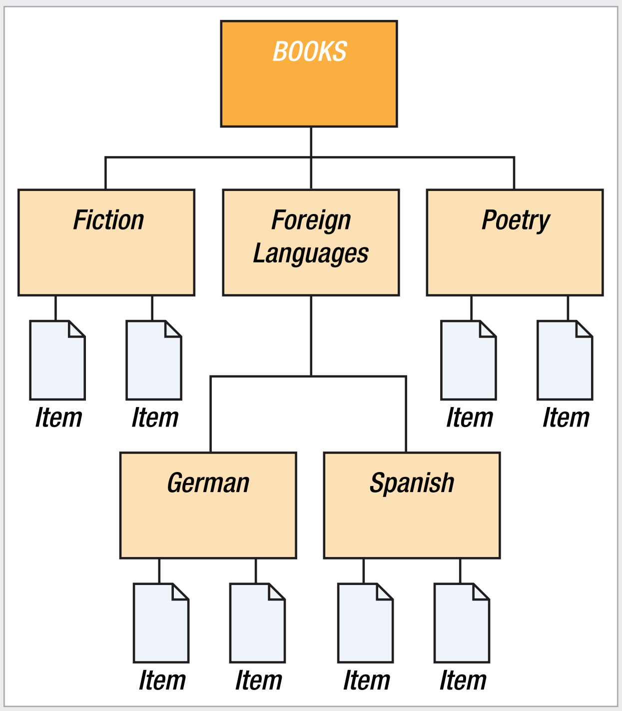
Putting It All Together

Creating & Publishing Your Catalog

A Catalog is a collection or grouping of items, usually marketing pieces, available for print that you wish to make available to a client. Clients can browse and order Items from the Catalog.

The structure of a Catalog can be very fluid, according to the business needs of your company. A Catalog can split into various categories, each of these may hold further sub-categories. The actual Items to be ordered should be included in these categories.

Example Catalog Structure



In this example Books is the Catalog, it contains three Categories - Fiction, Foreign Languages and Poetry. Fiction and Poetry each contain two Items, but Foreign Languages contains two Sub-Categories, each containing two Items.

Mtivity recommends that you spend some time planning a logical structure for your Catalog.

It is usually more efficient to build a Catalog from the bottom up; first creating Items, then the Categories to hold these items, and finally the Catalog itself which will ultimately contain these Categories. Once you have built your entire Catalog, you can make it available to your client by publishing. Clients can then view and place orders for the Items within that Catalog.

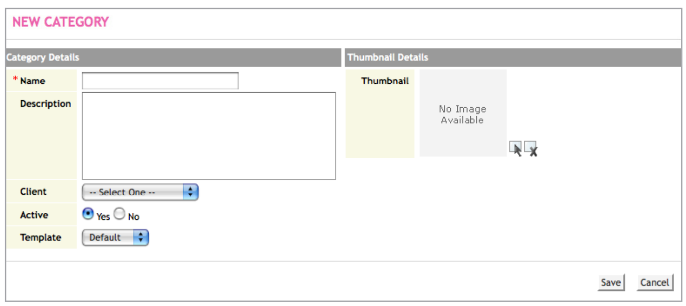
Categories

A Category is a folder or container within a Catalog, Items must be placed inside a Category in order to be viewed and ordered by your Clients.

Creating a Category

Location: Admin > Campaigns > Categories

1. Click New Category in the Tools menu on the right hand side. This will open the New Category screen.



2. Specify a Name for the Category, this will display to your Client
3. Provide a Description if further information is needed, this will display to your Client.
4. Select a Thumbnail. This will be shown to your Client along with the Name and Description.
5. Select a client: As mentioned in the Catalogs, client field is used mainly for searching for the object.
6. Display Template lets you choose if you want to

display the Category in the standard Mtivity format or whether you want to customise the look and feel of the pages yourself. There are two options for templates; Default and Two Row.

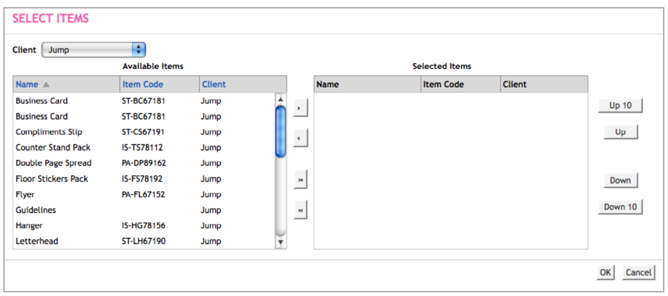
Default will display the category to the end user in standard Mtivity layout.

Two Row will reveal several new HTML editor boxes which become available for populating. Using these fields a "Mood Page" may be created for the Category. These will be discussed in the *Advanced Templates* section below.

Adding Items to a Category

Location: Admin > Campaigns > Categories

1. From you Category page, click the Add Item Tool. This will open the Select Items window.



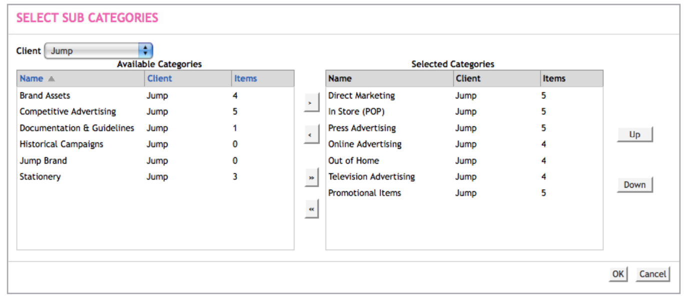
2. Move the Items you wish to select to the right hand panel either by double clicking or using the arrow buttons.
3. You may re-order the selected Items by using the Up and Down buttons on the right.
4. Once you have selected the Items you wish to appear in your Category, click the OK button.

Adding Sub Categories to a Category

Location: Admin > Campaigns > Categories

Sub Categories can be created within categories to form a tree like structure.

1. From a Category's detail page, click the Manage Sub Categories Tool. This will open up a window which you can use to add/remove Sub Categories.
2. Select the Categories you want to include as Sub Categories by moving them to the right hand side of the frame.
3. You can use the Up and Down buttons to order the Sub Categories.
4. Once you have selected the Sub Categories you wish to appear in your Category, click the OK button.



Catalogs

A Catalog can be thought of as the top level folder that contains all the Categories and Items.

Creating a Catalog

Location: Admin > Catalogs > Catalogs

1. Click New Catalog in the Tools menu on the right hand side. This will open the New Campaign screen
2. Specify a name for the campaign.
3. It is generally a good idea to select your Client from the menu, this makes the object easier to find later.
4. If you want to add some more information about the campaign, you can do so in the Description field - your clients will be able to see this.
5. You can select a Thumbnail for the Catalog. This will appear to your Client against the name but only if multiple Catalogs are published - if only one Catalog is published to the Client they will be taken there directly.
6. Select a Job Manager for the Catalog. When the Client places an order for any Items in the Catalog, a Job will be created in the background to process the Order. The Job Manager will be responsible for the Order's completion.
7. Direct Client Purchasing allows the Supplier to communicate directly with the Client. When an Order is placed, the PO is sent to the Supplier from the Client and any further communication is

handled directly between the Client and Supplier without having to go through the Job Manager.

8. Order fields define which fields you need to capture when the Client places an Order. You can also specify whether these fields are mandatory (required) or optional.
9. Job Type: When an Order is placed, a Job is created by Mtivity in the background. The Job Type is generally used for reporting purposes.
10. Selecting a Workflow will ensure that your Jobs progress in a timely manner. These workflow steps mainly govern a Job Status change at the end of each step in the Order process. You can select any one workflow for the Catalog. Mtivity recommends using a Workflow to at least automatically send and accept the Purchase Order that is created when an Order is placed - if not set, this is a common reason for Jobs to stall.
11. If the Display Terms option is selected, it will allow you to enter any Terms & Conditions or SLAs that you will have with the client. These can either be entered as text, or uploaded as a file. Using the field Accept Terms options, you can define whether the Client is obliged to accept the Terms & Conditions before placing their Order.
12. Upload Order Request allows the Client to send a file and message to the catalog manager from within the Catalog. This can be used for things such as the Client uploading a media schedule, or requests for new Items in the Catalog. The Order Request Image displays beneath the Order Basket and serves as the link that opens the function.
13. Display Template lets you choose if you want your Catalog to be displayed in the standard Mtivity format or whether you want to customize the look and feel of the pages yourself. There are two options:

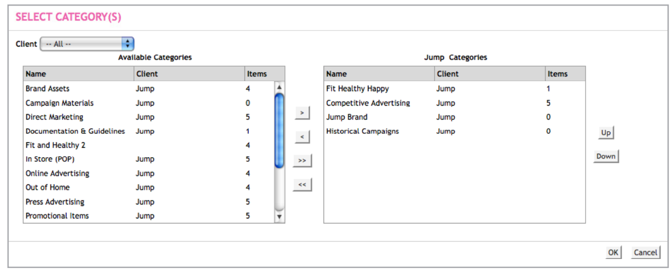
    Default will display the campaign to the end user in the standard Mtivity layout.

    If **Two Column** is selected several new HTML editor boxes will become available for populating. Using these fields a "Landing Page" may be created for the Catalog. These will be discussed in the *Advanced Templates* section.

Adding Categories to a Catalog

Location: Admin > Catalogs > Catalogs

1. From you Catalog page, click the Manage Categories Tool. This will open the Select Categories window.



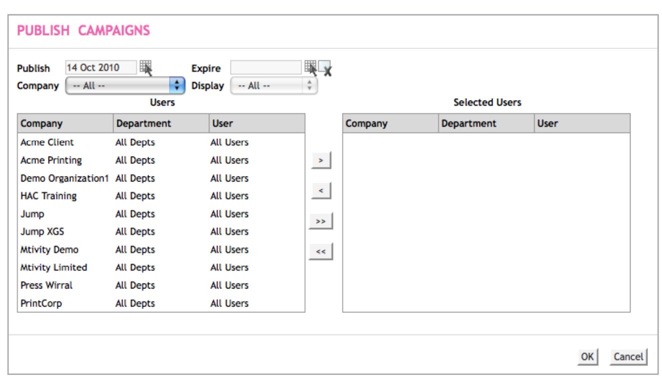
2. Move the Categories you wish to select to the right hand panel either by double clicking or using the arrow buttons. All Sub Categories and Items contained within a Category are moved too.
3. You may re-order the selected Items by using the Up and Down buttons on the right.
4. Once you have selected the Categories you wish to appear in your Catalog, click the OK button.

Publishing a Catalog

Location: Admin > Catalogs > Catalogs

In order for your Clients to access a Catalog, it must first be published to them. It is a good idea to also publish the Catalog to yourself to check that everything appears how you intend. If your Client company is not yet created in Mtivity, you will have to set that up before you can publish. Details to do this can be found in section *Setting up Client & Supplier Companies.*

1. From you Catalog page, click the Publish Tool. This will open the Publish Catalog window.



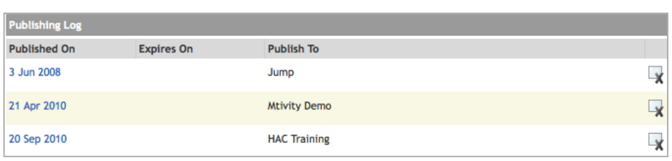
2. You can publish Catalogs to one or more companies, which means that it will be available to all users of the company, to do this select the All Depts, All Users row and move it to the right.
3. You can use the Company and Display filter menus to publish it to only selected departments of companies. This will allow only users of those departments to access the Catalog. You can even publish it to individual users in a company by selecting Users from the Display menu.
4. You can define how long the Catalog will remain published by specifying a Expiry date. Simply leave this blank if you intend the Catalog to be published permanently.
5. Click the OK button to Publish your Catalog.

> **Making Changes to a Published Catalog**
>
> There is no need to "republish" a Catalog after making amendments or additions. Any changes made to a published Catalog (including anything within it) are updated in real-time. So for example, if a new Item is added to a Category within a Published Catalog, it will be available to your Clients immediately.

Amending Publishing Details

Location: Admin > Catalogs > Catalogs

1. On the Catalog Details page, a Publishing Log appears displaying details of when and to who the Catalog has been published to.



2. You can unpublish the Catalog by clicking the Unpublish icon ( ) to the right of the entry. This will remove the Catalog from your Client's view.
3. To make changes such as removing or adding Departments and or Users, click the date on the left to re-open the Publish window.

Catalog Orders Message

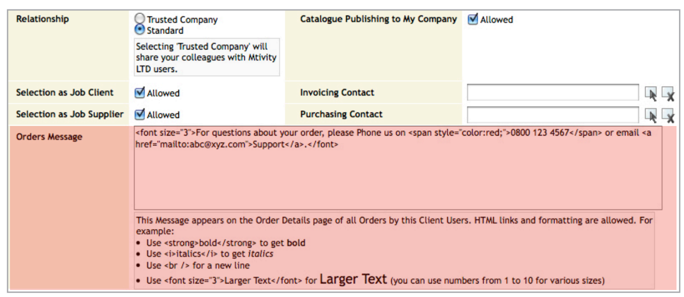
You can specify a message which appears on the order screen of each client company. This message can be used to specify any support or contact details which the client can use if they have queries about their order.

Creating an Orders Message

Location: Admin > Relationships > Account Details

An Orders message is created against a client company, if you have multiple clients each may have a different message defined.

1. From the Admin > Relationships tab, click on the client that you wish to create a message for. This will open the Account Details screen.
2. Click the Edit button at the top of the page. This will open the Edit Account Details screen
3. Near the bottom of the page is the Orders Message input area. You may use HTML tags to format your message.

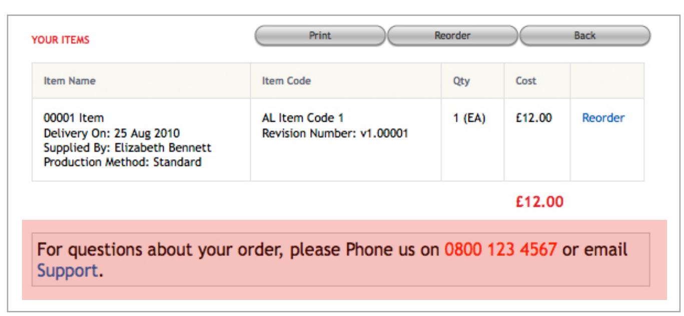


4. Click the Save button to create your message.

Viewing an Orders Message

Location: Dashboard > Orders > Order Details

Your Orders Message will appear beneath the Items on the Order Details screens for the specified clients. All users from the chosen company will see the same message.



Advanced Templates

Mtivity allows you to select specialised templates for Catalogs and Categories using “Two Column” and “Two Row” templates respectively.

The **Two Column** template for Catalogs has four input boxes for HTML input.

A good primer on HTML can be found here: *http://www.w3schools.com/html/html_primary.asp*

A Client’s View of a Catalog

Below is how your Client would view a Catalog that uses an advanced template.

- **Banner**: Using HTML you can create a Banner that will appear on the Top of the “Landing Page.” The image that is used in the Banner has to be hosted (on a web server) and the HTML code must reference this image and its location.
- **Video / Image**: An image or a video file that is hosted on a web server can be displayed using HTML code. The optimized resolution for screens is 1024 x 768, anything below this will start to degrade. The optimal Flash file dimensions should be 628 Height and 358 Width (pixels)
- **Welcome**: The Welcome message is displayed below the Banner on the “Landing Page”. It is important to note that there is great flexibility to what can be displayed. You may decide to provide links within the code or use different flash files in the various positions.
- **What’s New**: Again using HTML code you have the ability to enter in details of any New information that you wish to highlight to the client user. The “What’s New” section appears on the right hand side of the “Landing Page” above the list of Categories.

The **Two Row** template for Categories has three input boxes allowing HTML input. Like the Catalog area, because you are entering HTML code, you are afforded a great deal of freedom in what purpose you actually use the below areas for. A Category using this template should only include Sub Categories - not Items.

Customer Journey: Using HTML code an image that is hosted on a web server may be pulled into the “Mood Screen”

Mood Video: Again, using HTML a hosted flash video may be shown on the Mood Screen to set the tone of items within the sub categories. The video might be used to display timelines, or updates to the end users

Product Guidelines: Using HTML code a link can be created that will take the user to a PDF with detailed guidelines on how the items should be ordered or the campaign run

A Client’s View of a Category

Below is how your Client would view a Category that uses an advanced template. Please note: when using this template your category should only contain Sub Categories, not Items.

Users & Companies

Setting Up Your Clients & Suppliers

To set up a new Company, you will have to first create a new Contact in Mtivity, on doing so, the new Company will be created and the Contact will be added to the new Company as the administrator.

Note: If you are creating a Client Company to publish your Catalog to, it is most likely that you also want to define the branding for the Client and bulk upload users. In this case, Mtivity recommends that you register yourself as an administrator in the Client Company and retain the email address you used to register. Since Mtivity allows an email to be used only in one company, what users typically do is register a different email in gmail/hotmail etc, and use that email to invite themselves as an administrator in the Client Company.

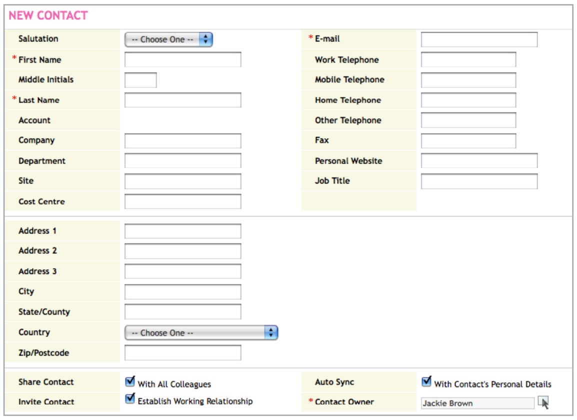
Companies

Client and supplier companies are created in the same manner in the Address Book section.

Creating a New Company

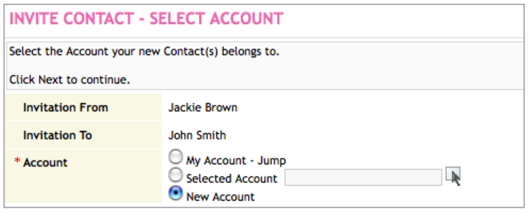
Location: Address Book

1. In the address book, you can see a list of all your contacts in Mtivity. This page also shows whether your contacts are signed-up to Mtivity.
2. Click the New Tool on the right hand side, this will open the New Contact screen.



3. First Name, Last Name and email id are the mandatory fields to create a new contact
4. Ensure that Invite Contact checkbox is ticked, so that the user can be invited to sign up to Mtivity.

   Note: If you want to brand the client company, you may want to enter an email address that you have access to, and that has not been used in Mtivity (see note above).
5. When you click on Next, the second step will be to select account to add user to. Here you should select the option – New account.



6. This will take you to the New Account page, where you can specify the Account Name for the client company and the address.
7. You can then invite the user to sign up to Mtivity. Use the Message box if you would like to add a personal note to the new user. Click Invite to finish the process, this will send an invitation email which contains a link to the system and a temporary username and password.

Once the user accepts the invitation, the client company will be created and the first user that signs up will have administrator rights in the company.

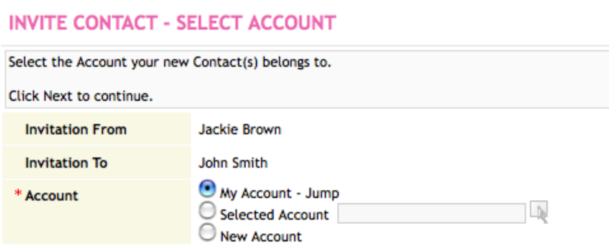
Users

There are two methods of adding users to Mtivity. The manual process will send out an invitation which needs to be accepted by the invited user. The Bulk import of users bypasses the invitation process - users are directly added.

Manually Adding Users

Location: Address Book

1. Users can be added to a Company from the Address Book by clicking the New Tool (as described above)
2. Enter the User’s details and click Next
3. In step 2, choose either your own Company or select the Client or Supplier Company you wish to add the user to. Click Next.



4. You can then invite the user to sign up to Mtivity. Use the Message box if you would like to add a personal note to the new user. Click Invite to finish the process, this will send an invitation email which contains a link to the system and a temporary username and password.

Bulk Import of Users

Location: Admin > Data Management

If you wish to import users to a new company contact Mtivity Support to turn this function on for you.

1. To import users you need to enter their details into a CSV file and import the file into Mtivity. The template for the CSV can be obtained by exporting users - this will export a CSV file with existing users in the Company.
2. Populate the columns of the CSV with the users to be uploaded. You should leave the ID column blank for the New users - this will be assigned by the system. The most important columns are the First Name, Last Name, Password and Email Address.
3. When you’re done, import this CSV into Mtivity. The system will check for errors before importing.

Note: Importing users allows you to set everything up before users access the system, therefore Mtivity does not send notifications - you need to inform new users of their access details manually.

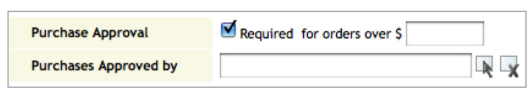
Setting up Approvals

Location: Admin > Users

You might want to set up an Approval process for users of the Client Company. A maximum limit can be set for a user to place a single order. If the order exceeds that budget, then the order would require Approval. If you want every order placed to go through an Approval process, the limit should simply be set to zero.

Approvals can only be set up for users in your own company, so if you are setting up approvals on behalf of a Client you will need to be logged in as an Administrator in their Company.

1. From the Users listing page, click on the User that you wish to set up an Approval for.
2. Click the Edit Tool on the right hand side.
3. Near the foot of the page on the left hand side you will see the Purchase Approval area.



4. Use the checkbox to select Required
5. Specify the amount over which approval should be obtained. Enter 0 to ensure that all orders must be approved.
6. You should also specify who the Approver is. This person will receive email notification with a link to the order that needs to be approved. There they will be able to Approve or Reject the Order.
7. Click the Save button to save your changes.

Budget Compliance

Location: Admin > Users

Budget can be allocated for a user to spend in a definite period – typically a quarter. Every Order placed by the user will use funds from the budget, and will disallow purchase if the user has used up all their funds.

Budget can only be set up for users in your own company, so if you are setting up a Budget on behalf of a Client you will need to be logged in as an Administrator in their Company.

1. From the Users listing page, click on the User that you wish to set up a Budget for.
2. Click the Edit Tool on the right hand side.
3. Near the foot of the page on the right hand side you will see the Catalog Budget Compliance area.

Catalogue Budget Compliance	☑ Required
Current Budget Allocation ($)	0.00 Edit Funds | New Budget Allocation
Spent ($)	0.00
Remaining ($)	0.00

4. Use the checkbox to select Required
5. Click the New Budget Allocation link to add funds, this will be the budget that user will be working with.
6. You can add or subtract funds to an existing Budget using Edit funds.
7. Click the Save button to save your changes.

Any order placed by the user, will use funds from this Budget. The spend amount and remaining budget available for the user will be displayed in the user details. The user themselves can see their remaining Budget in the area above their Shopping Cart.

When its end of a quarter, you can allocate a new Budget to the user. This will end the existing Budget, and create a new Budget for the user to work with.

Branding

With an administrator login, you can brand your client company, so that users logging in will be able to enjoy a customized look and feel.

The name of the 'Catalog' tab may be changed to suit your or your Client's purposes - please contact Mtivity Support to make this change.

Setting a Company's Branding

Location: Admin > General Settings

This page will show the default settings that Mtivity populates for any company. You can edit these to suit your needs.

1. You can do this by using the Edit Tool on the toolbar in the right hand side.
2. The Style section is what you are most likely to change for the client company to give it a personalized look and feel.

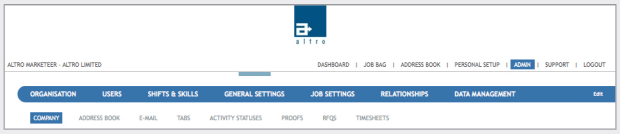
3. Style allows you to change the color scheme. Click the Selection Tool ( ) to preview the available styles. When you have chosen your style, select OK for it to be applied. The new style will be shown immediately after you click Save on the Edit Company Settings page. If you would like a unique style created for your organization, please contact Mtivity Support for a quote.
4. You can upload a company logo as a Header Image. For this select Custom from the Application Header options, and then upload your logo. Images should be in gif, jpeg, or png format.

   If your logo is to be aligned left, center or right Mtivity recommends a height of up to 60 pixels. The height of the header area will expand to the height of your logo, so if its too tall the navigation will be pushed down the page. You will have the entire width of the screen available in the header area.

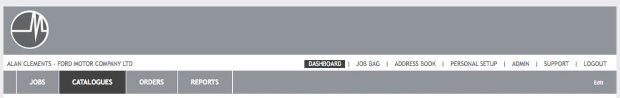
   If your logo is to be displayed inline, Mtivity recommends a width smaller than 110 pixels and a height of 80 pixels.
5. In conjunction with choosing a image for your header, you can also select a Background Color. This will apply the selected color to the banner area above the Section Navigation. The height of this area is determined by the height of the Header Image you upload. The color should be entered in Hex format. (To convert an RGB color to Hex, see www.easycalculation.com/rgb-coder.php)
6. Image Alignment determines the position within the header area you wish your logo to appear. Left, Center and Right will place your logo in the banner area above the Section Navigation. Inline will place your logo to the left of the navigation.

Branding Examples

This is an inline Logo with a size of W:109px H:82px.



In this example the logo has been aligned to the center, its size is W:49px H: 60px.

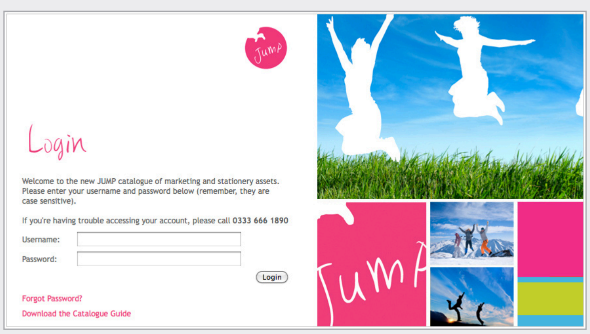


This example has a background color of gray, with a logo set to align left. You can see from the background color that the whole header area above the section navigation is available.

Creating a Custom Login Page

An HTML login page may be created for access to Mtivity. This can be hosted on a client server which will allow users to access the system without going to www.mtivity.com

Custom Login Page



Note: If needed, Mtivity can host your custom login page for you.

1. Create a standard HTML page and include a form for users to enter their username and password.

   The following code is the minimum that is needed for the form to submit the user's details to Mtivity for authentication.

```
<form action=”https://www.mtivity.com/apps/DcLogin.csp” id=”Login” name=”Login” method=”post”>

<input type=”text” name=”username” id=”username” />

<input type=”password” name=”password” id=”password” />

<input type=”submit” name=”Login” id=”Login” value=”Login” />

</form>
```

2. You can test your HTML page by logging in with any username and password.
3. Once you have a URL for your hosted page you should enter this in Admin > General Settings > Logout Page. This will ensure that when your users log out or are timed out they will return to your custom login page rather than www.mtivity.com