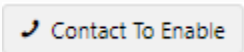


Flyer Creator

Is this feature disabled?

 Contact To Enable

This feature needs to be switched on for your site by Commerce Vision.

Overview

Do your customers distribute or resell your products? Perhaps your sales reps would appreciate a 1-page flyer they can leave with potential buyers? Or are you after a simple way to include timely marketing material in shipments leaving the warehouse or to email to specific customers?

Flyer Creator lets logged in website users (by Role) create 1-page brochures with selected products from your catalogue. The content is auto-generated as a PDF in seconds.

Example

This example uses the out-of-the-box styling to produce a 9 product flyer. Flyer header and footer design can be customised through stylesheet updates in the CMS.

Flyer Creator Input	Flyer Creator Output
---------------------	----------------------

On this page:

- Overview
- Step-by-Step
 - 1. Configure Feature Settings
 - 2. Create a Flyer
 - 3. Customisations (Optional)
 - Configure the Flyer Creator
 - Customise Output
 - Customise the Theme
- Customise Contact Fields for the PDF header
 - 1. Enter custom contact fields
 - 2. Create custom widget to output fields
 - 3. Use custom widget
- Additional Information
- Related help
 - Related widgets

Flyer Creator

Create your PDF Flyer with the following settings

Populate from Campaign (optional):
Please Select

Choose layout:

1

1 2
2

1 2 3
4 5 6
7 8 9

Flyer Name: *
Spring Music Sale!

Margin %:
20

Flyer Footer Text:
While stocks last. Limit 20 per customer.

Phone:
07-3369-3733

Fax:
07-3891-3996

Email:
support@commercevision.com.au

Address:
30 Lisburn Street, East Brisbane QLD 4169

Add Products To Flyer:

Product Code	Description	Margin %	Cost Price	Flyer Price
CV178	Metal Karao	20	2.08	2.6
CV176	Soprano Glockenspiel	20	50.16	62.7

Learn-To-Play Piano
\$79.41

Cymbals
\$17.71

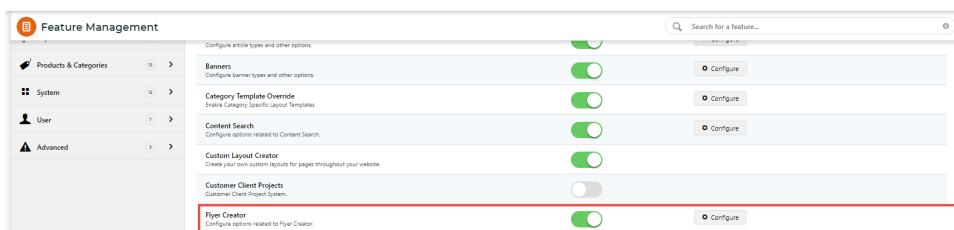
Soprano Glockenspiel
\$50.16

Step-by-Step

1. Configure Feature Settings

Enable access for specific roles:

1. In the CMS, go to **Settings Settings Feature Management Content**.
2. Ensure **Flyer Creator** is enabled, then click **Configure**.



3. Every role on your website is listed. To allow a role access, toggle ON **Enable Flyer Creator** for the role.



Be aware that **enabling Flyer Creator** for a particular Role will give access to all users with that Role.

Flyer Creator Settings
Cancel Save & Exit

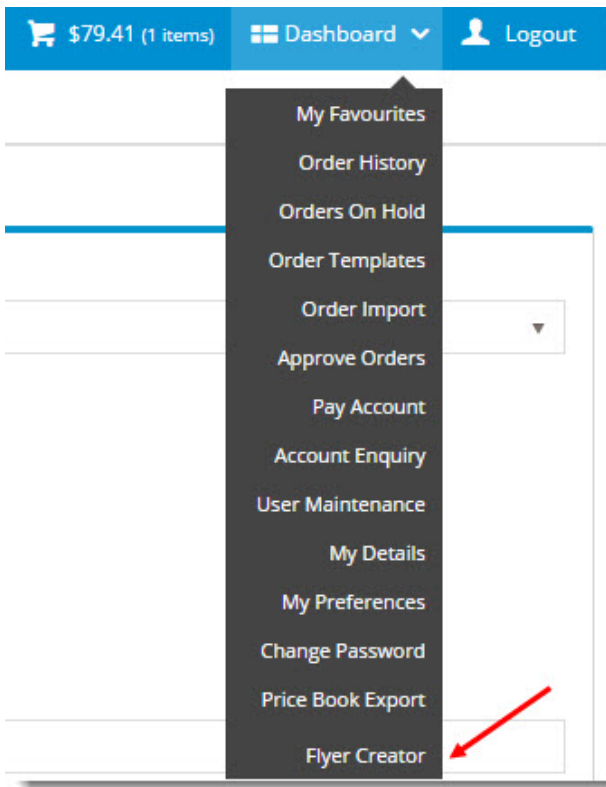
Feature Options
Configure settings related to the Flyer Creator feature

	Menu Code	Role Name
☐ Enable Flyer Creator	Customer Self Service - Accounts Only (CSSACC)	Accounts Team (No Ordering) (Accounts)
☒ Enable Flyer Creator	Customer Self Service - Ordering Only (CSSORD)	Purchasing Officer (No Accounts Access) (CSSORD)
☒ Enable Flyer Creator	Customer Self Service - B2B (CSS)	Business To Business User (B2B Default) (CSSUser)
☐ Enable Flyer Creator	Public (PUBLIC)	Public User - Not Logged In (PUBLIC) Self Registered Casual User (B2C) (PUBLICR)

4. To save any changes, click **Save & Exit**.

2. Create a Flyer

1. Logon to the website. The user must be in a Role enabled for Flyer Creator access.
2. Go to the **Dashboard** menu and select **Flyer Creator**.



3. (optional) Select a **Campaign** from the dropdown list. This will automatically populate your flyer product list with products from the campaign.

Populate from Campaign (optional):

Music Sale

Please Select

Featured Products

Music Sale

Popular Products

4. Choose the appropriate layout, depending on the number of products on your flyer. Remember, flyers are one-page productions!

Choose layout:



5. Give your flyer a **Name**. If populated with products from a campaign, the campaign name will appear here. Feel free to edit it. In the PDF, it will appear as a heading above the products.

Flyer Name: *

Music Sale

6. Enter your **Markup or Margin %**. (The default Profit Calculation method is 'Markup', but you can change this in the Flyer Creator widget. See: **Customisations** section below).

Margin %:

20

7. Enter text to appear on the **Footer** of the PDF.

Flyer Footer Text:

While Stocks Last. Offer ends midnight 31 October 2017.

8. IF the option has been enabled on the widget, enter address information. (See: Customise Options below.)

- If these fields are hidden, the customer's default address will be used.

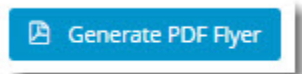
9. If the flyer does not yet have campaign products, enter them in the product lines below.

- **Product Code**: acts as a search, with the list populating as you type.
- **Description**: for reference only. Cannot be edited.
- **Flyer Price**: calculated based on the customer's price and the method selected.
- **Changing the %**: updates the Flyer Price.
- **Changing the Flyer Price**: updates the %.
- **The Cost Price**: for reference only. Cannot be edited.

Add Products To Flyer:

Product Code	Description	Margin %	Cost Price	Flyer Price
CV23	Pilot G-2 Retractable Gel Pen, Fine Point, Assorted	20	13.53	16.91
BIC Velocity Retractable Ballpoint Pen, Medium Point (1000)				
Pilot G-2 Retractable Gel Pen, Fine Point, Assorted (1000)				
uni-ball Jetstream Retractable Rollerball Pen, Bold Point (1000)				
Secure-A-Pen Chain Mounted Counter Pen, Black (1000)				
Paper Mate Stick Ballpoint Pen, Medium (1000)				

10. Once all products have been added, click '**Generate PDF Flyer**'.



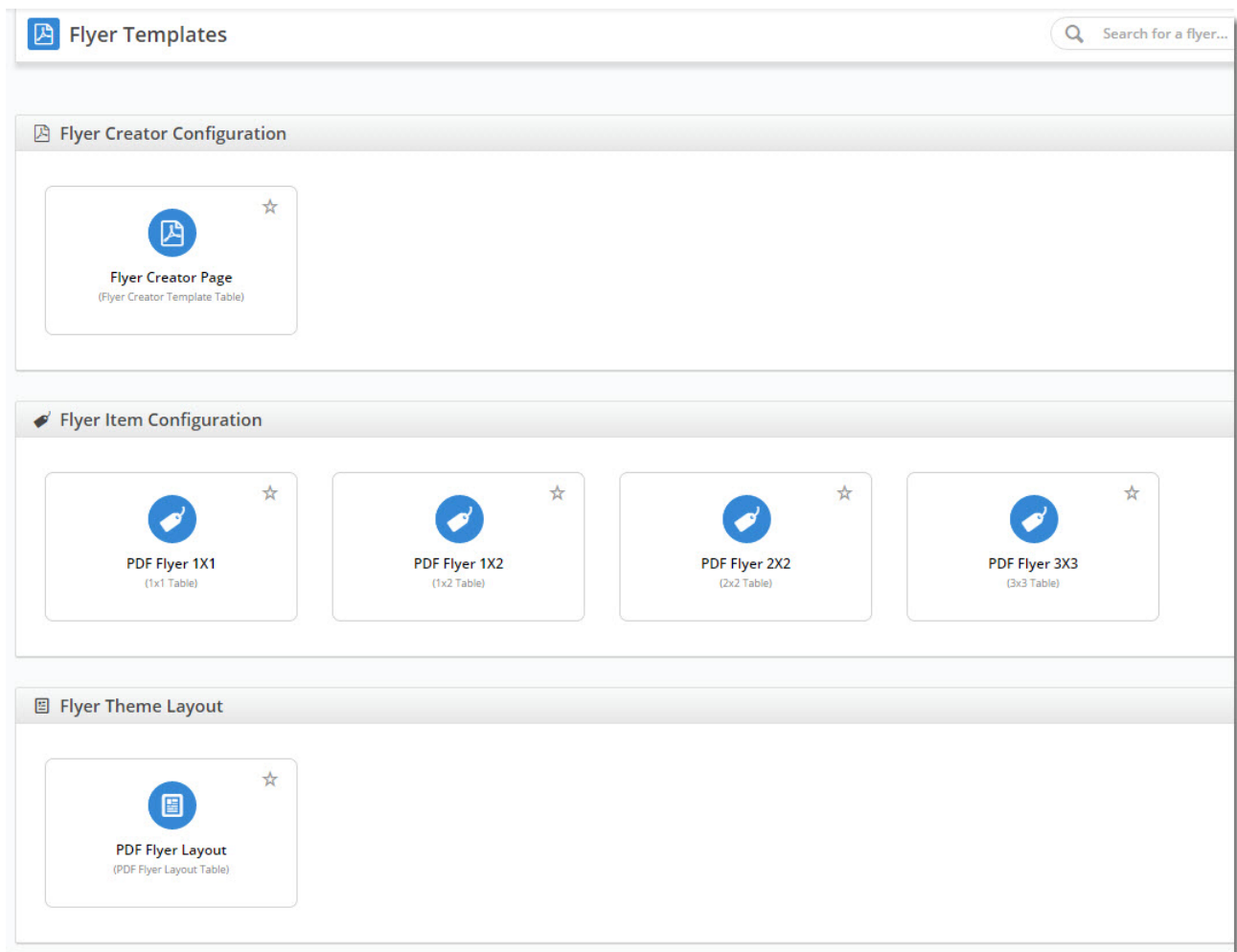
11. Your file will be downloaded instantly.

3. Customisations (Optional)

There are several ways you can customise the look of your flyers as well as the Flyer Creator interface itself. But it's important to note that the following customisations are purely OPTIONAL. Flyer Creator works out of the box, and if you're happy with the defaults, you need do nothing further!

In the CMS, go to **Content Content Flyers**. Here you will find:

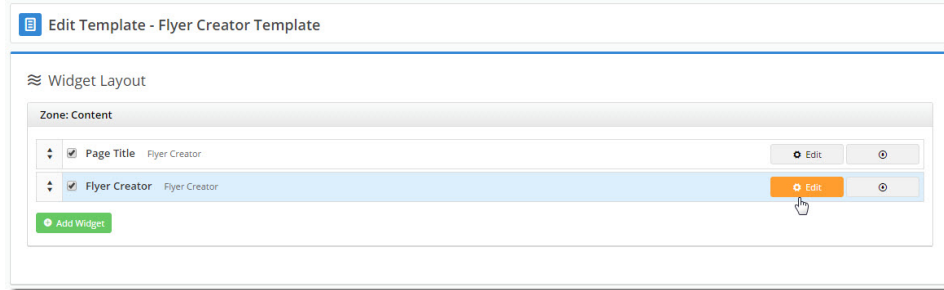
- the Flyer Creator page template
- the Flyer item templates for each grid layout.
- the Theme Layout template for the overall styling of the PDF.



Configure the Flyer Creator

1. On the *Flyers* page, select the **Flyer Creator Page** template.

2. Edit the **Flyer Creator** widget.



3. Edit options and field labels as needed. See: [Flyer Creator Widget](#).

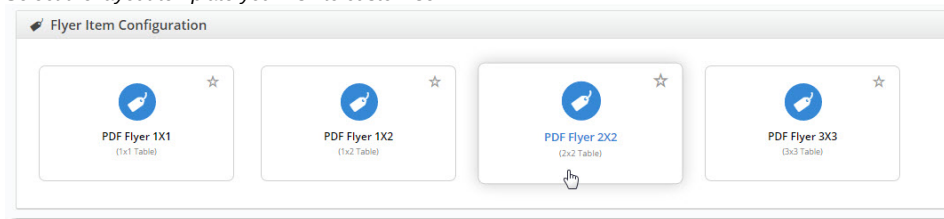
4. Click **Save**.

Customise Output

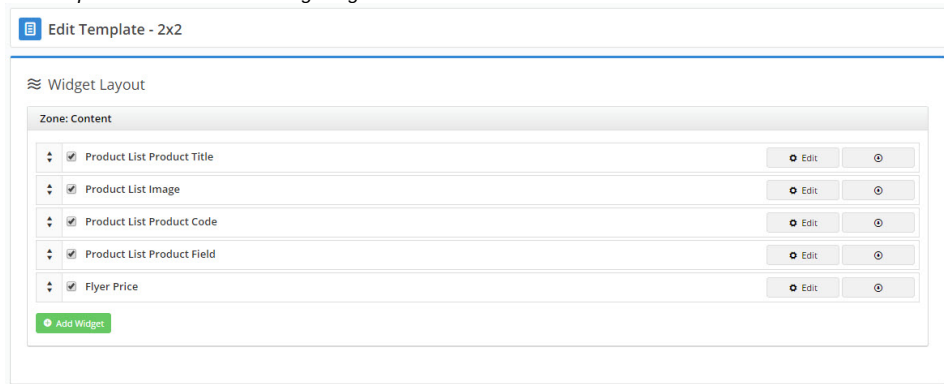
You can also easily configure the content on the PDF. Because each layout is widget-based, you can add, remove, and rearrange widgets as needed.

1. Go to **Content Content Flyers**.

2. Select the layout template you wish to customise.

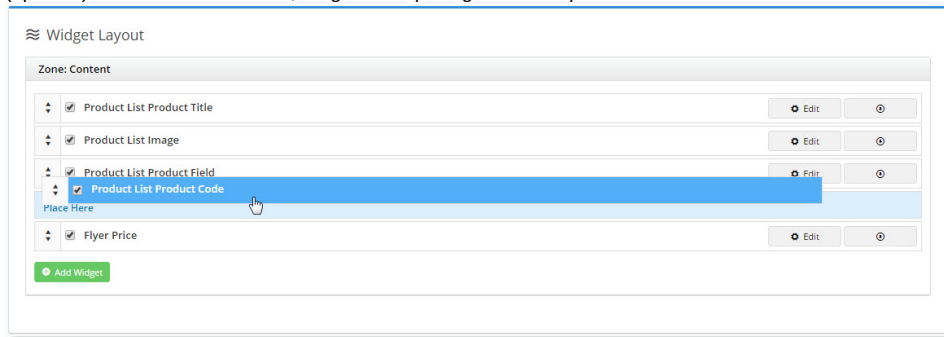


3. The template will load with existing widgets.



4. (optional) To add a new widget, click **Add Widget**.

5. (optional) To reorder the content, drag and drop widgets to new positions.



6. To edit options, click **Edit**.

Customise the Theme

The 'PDF Flyer Layout' is the Flyer Creator equivalent of your site's Theme Layout. It controls the header and footer content, and the stylesheet used.

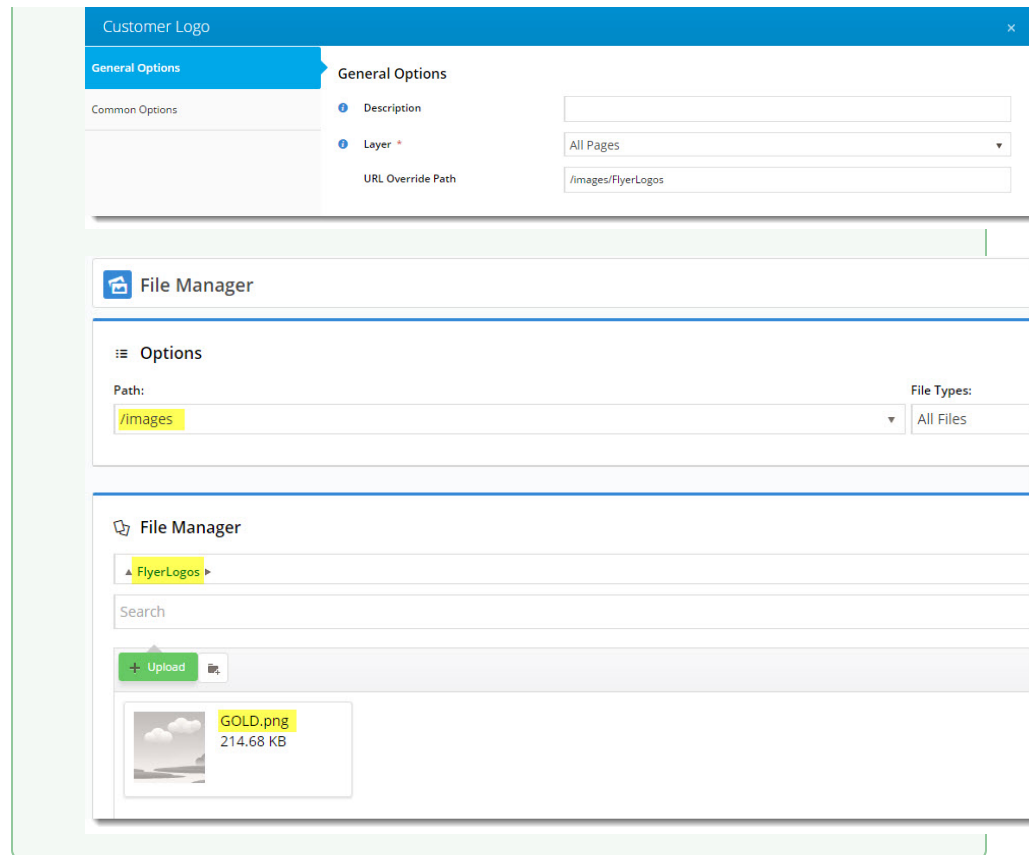
1. Go to **Content Content Flyers**.
2. Select the **PDF Flyer Layout** template.
3. The template will load, revealing the list of widgets as follows:

- a. **Customer Logo widget** - outputs the logo for the logged in customer.

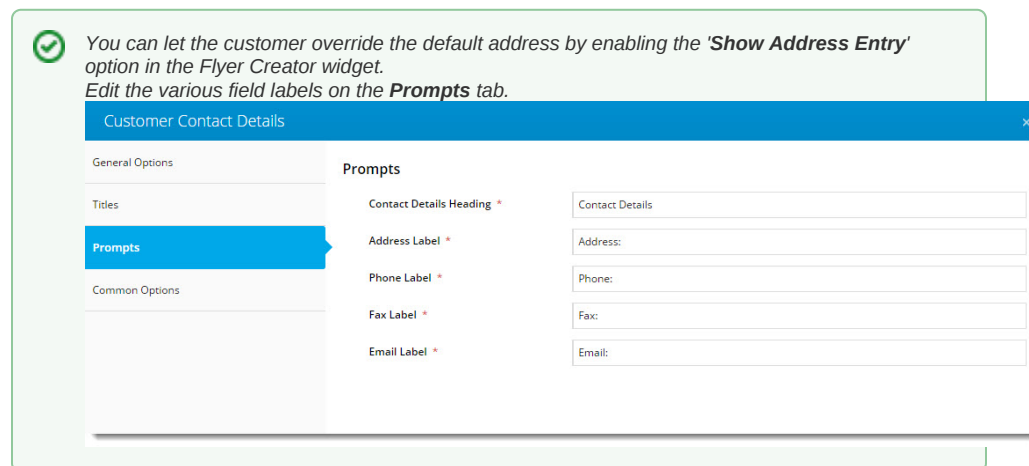
You will need a logo image uploaded to the **images/flyers** folder for each customer who uses Flyer Creator. The filename should be in the format 'CustomerCode.png' (or .jpg).



You can override the path to use a different folder by entering the new file location in '**URL Override Path**' (example shown below for customer code 'GOLD').



b. Customer Contact Details widget - outputs the default address for the logged in customer.



c. Flyer Product List Grid widget - outputs the actual product data in the main content zone of the PDF.

Customise Contact Fields for the PDF header

For version 4.37+ only.

Instead of displaying the default contact fields in the header, you can customise the contact fields flyer creators enter in the form. What the user enters will display in the PDF header.



IMPORTANT- This option requires the creation of a custom widget to replace the Customer Contact Details Widget. A basic template is included below for the custom widget. Basic coding and styling knowledge is required. Consult Commerce Vision if you need the custom widget implemented for your site.

1. Enter custom contact fields

1. Go to **Content Content Flyers**.
2. Click the **Flyer Creator Configuration** template.
3. Click **Edit** for the [Flyer Creator Widget](#),
4. In **Custom Fields**, enter the alternate address fields. A field must be in the following format:

Field_Id=FieldName

To separate two fields, insert a semi-colon in between.

Custom Fields

Contact=Contact;Address=Address;Phone=Phone;Email=Email;Website=Website



To render fields entered here in the pdf flyer, a custom widget must be added to the **PDF Flyer Layout template** and enabled. The default [Customer Contact Details Widget](#) must be disabled. If there is no valid custom widget, the contact details fields in the pdf header will be empty.

5. Click **Save**.

2. Create custom widget to output fields

1. Go to **Advanced Content Custom Widgets**.
2. Click **Add New Widget**.
3. Enter a name for your widget.
4. Enter details for the custom widget. For a guide on other fields, see: [custom widgets](#).
5. In **Source Code**, enter code (razor syntax) to render the custom fields in the pdf header.

The example below can be adapted for your custom contact fields. Just copy and paste, then edit.

Think of the code as being in two blocks. Block 1 contains some lines bracketed by `@{ ... }` These lines access the custom field values entered by the user. Block 2 renders these values in the pdf header. You can style the text as you wish. A Contact Details header is included in the example.

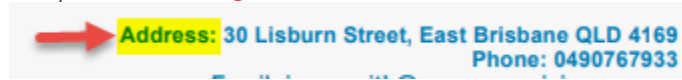
Edit the following:

Block 1

- For each line starting with **var** , e.g., field1, field2, etc. Each line links to a custom field. 'field1' etc can be named anything. It just needs to be prefixed with **@** in a line in Block 2 to render.
- =Model.CUS_data; Change 'data', e.g., 'Address' to a custom field's Field_Id.

Block 2

- The details to be rendered in the header are formatted by html. You can enter a label for each field. For instance, we want the address to be preceded by the 'Address:' label. Then add @field1
Example: `<h3>Address: @field1</h3>`



NOTE - The number of lines you have depend on how many custom fields you want rendered in the header. You may have more or fewer than the example.

- You can also add static content such as the 'CONTACT DETAILS' heading here.

----- COPY CODE BELOW THIS LINE -----

```
@{
var field1 = Model.CUS_Address;
var field2 = Model.CUS_Phone;
var field3 = Model.CUS_Email;
var field4 = Model.CUS_Website;
}

<div style="border-bottom:1px solid #fff">
  <h1>CONTACT DETAILS</h1>
</div>

<table>
  <tr>
    <td style="width:150px"><b>Address:</b></td>
    <td>@field1</td>
  </tr>
  <tr>
    <td style="width:150px"><b>Phone:</b></td>
    <td>@field2</td>
  </tr>
  <tr>
    <td style="width:150px"><b>Email:</b></td>
    <td>@field3</td>
  </tr>
  <tr>
    <td style="width:150px"><b>Website:</b></td>
    <td>@field4</td>
  </tr>
</table>
```

6. Click **Save**.

3. Use custom widget

1. Go to **Content Content Flyers**.

2. On the **Flyer Theme Layout** tab, click the **PDF Flyer Layout** template.

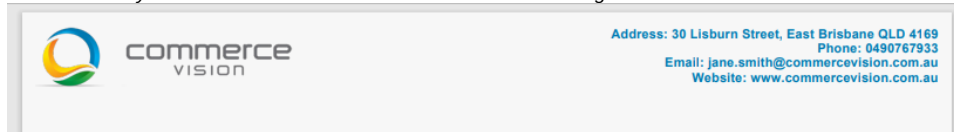
3. Click **Add Widget**,

4. Find the custom widget, then click **Add Widget**.

5. Disable the default widget: **Customer Contact Details Widget**.



6. Create a test flyer and check the PDF header uses the custom widget.



Additional Information

Minimum Version Requirements	3.94.00
Prerequisites	Flyer Creator enabled.
Self Configurable	Yes
Business Function	Marketing
BPD Only?	Yes
B2B/B2C/Both	B2B
Third Party Costs	n/a

Related help

Related widgets

- [Customer Contact Details Widget](#)
- [Customer Logo Widget](#)
- [Flyer Product List Grid Widget](#)
- [Flyer Creator Widget](#)
- [Flyer Price Widget](#)
- [PDF Flyer Style Sheet Widget](#)