eDoc Builder Templates – *GENERAL STEPS*

1. Open business card native file – Corel Draw, InDesign etc.
2. Export a PDF for NexPress NO BLEED with all contact/employee information visible on the card (CorelDraw: if the business card has bleed, you need to make the page size the overall size of the bleed, 3.75 x 2.25)
3. Obtain all fonts used in design that will be used as editable fields. (Corel Draw: File > Collect for Output > make sure to include CDR file and all fonts)
4. Open Press PDF
5. Select the Text Field Tool and double click anywhere on the page to create the first text box. Give this field a name eg. employeeName, employeeTitle etc. and work in order of the fields that will be editable
6. Resize each text box around the appropriate field, leaving as much space to the left and/or right (depending on justification) so that lots of information can be typed in the field eg. Joe Smith or Joseph Christopher Smith
7. For information (such as contact information, phone numbers etc.) that need to “talk” or “work” with each other – meaning if one number isn’t entered, the following number needs to move up a space, create a large text box around entire area.
8. For each field that is supposed to appear in this larger box, create a place-holder field. Eg. phPhone, phFax, phEmail etc. these fields will later be formatted to populate the larger box with the information the customer types in.
9. Once you’ve traced text boxes over each field and given them unique names go to the DocketManager > Maintenance > Online Ordering > Edit Online Templates
10. Create a new template and give it an obvious name, starting with the Company name eg. SmithTrucking_BusinessCard
11. You’re automatically taken to the “Assets” tab where you’re going to upload the PDF with all the text boxes you just created.
12. Upload all fonts that were gathered during the Collect for Output process. You can select up to four at one time for upload.
13. Click on the Template Field link in the top right. If this card has bleed type 9 in the box below “Bleed” which is the equivalent to .125” bleed.
14. Select “Name”/”EmployeeName” etc. from the dropdown under Identifying Field. The reason for this is that when someone places an order for this item, specifically if it’s a business card, the Job description in the DocketManager will automatically show what employee the card is for eg. John Doe > Save Changes
15. Click on Field Setup in the top right. This is where all the fields created are formatted.
16. Expand each field to the right to edit the tabs associated with each field. Once all fields are edited, Commit Changes and test the card.
17. If everything lines up properly, you can delete the background information from the PDF you created and re-upload the Master PDF under Assets. If you need to make minor adjustments in the PDF, re-upload the Master PDF each time to see the changes take effect.

18. To link this template to a template in DocketManager, create the template in DocketManager, either from New, or convert an existing/previous order to a template. Found in the Order Item screen at the top called “Create Template”
19. Open the newly created template and under the graphics area, click the refresh button to the right of the dropdown for Template: > find the template you created in the list, select and save the Order Item.
20. Don’t forget to make a JPG thumbnail preview for this item depicting where all the information is to go, Employee Name, Employee Title etc.