BrandingUI.com

Quick Start Guide:
Enterprise

Contents

Getting Started

You should be thinking about four things:

1. How do you want to organize your users? Which users should be site administrators? Which should be approvers for customized jobs submitted by other users?
2. What is your business structure? BrandingUI has the concept of departments that belong to business units. But that might not fit your structure, so you can call departments and business units by other names. For example, a design agency might create signage for several retailers, each with multiple stores, so a "business unit" could instead be called "retailer" and a "department" could be called "store."
3. Do you want to use forms? If so you'll need to create some. But first, make sure that forms are enabled on the General Settings/Options page in the Assets section. Then go to Assets/Forms to create some.
4. Which templates (and forms) do you want to show to which users? You will be assigning them to categories on the Assets pages. Then you will use the Categories sections on the Users page to specify which categories you will expose to your users.
5. Once users finish customizing their jobs, what should happen? Should they be sent to a print shop? Should the user be able to immediately download the results themselves? Do they need to be approved? Do some jobs need to go one place, but other jobs somewhere else?

On each of the settings pages mentioned below, we encourage you to click the "question mark" icon to show more help. To see this help again, select Getting Started from the round account icon at the top of the page.

Once you have thought this through, and once a designer has uploaded templates from InDesign using the PrintUI Management panel, you should change your settings in this order:

1. Go to the General settings page. Note that some of the settings are marked with an asterisk which indicates that they are required.
2. Go to the Notifications settings page.
3. Go to the Business Structure settings page to enter your desired business structure. Note that each business unit and each department has an Options button next to it. You can ignore that for now, but you may want to use it later to override the general settings.
4. Go to the Assets pages and use the Change Categories button to categorize your templates and forms (if any). (If you don't see all of the recently uploaded templates, refresh the list from the "more" menu (with a ⋮ icon) at the top.) You can pick whatever category names you want, and you can assign more than one category to each template or form. You will notice a Change Keywords and a Change Options button as well.

Keywords are used when your users search for templates or forms. And the options will allow you to later override the general settings. However, keywords and options are not required to get started.

5. Go to the [Users page](#) to enter your users.

   ○ You can manually enter them one at a time.
   ○ Or you can upload an Excel XSLX file.
   ○ Users can also request an account from the sign-in page, but you must approve it. Or you can use the User/Automatic Users settings to automatically approve users when they have a specific email address.
   ○ Be sure to assign each user to a specific role such as User, Approver, or Administrator (or some combination).
   ○ It is especially important to assign Approvers to cover each of your business units and departments. However, if you can't do that for some reason, you can also specify default approvers on the [Approvals settings page](#). They will get used whenever a specific Approver can't be found. You can even enter specific default approvers as a Business Structure or Assets override using the Options buttons.
   ○ Go to the Users/Categories settings to specify which Assets categories that your users should see. To test your settings, select a user and then click on the View As button at the top of the page. You will be able to see exactly the same thing they do when they sign in.

6. Go to the [Completion page](#) to specify what happens when the user finishes customizing their job. Create all of the possibilities that you can envision, even if some are specific to just one department or to only certain templates. At the same time, specify whether the completion method requires approvals or not.

7. Visit each of the other settings pages and select the settings that are right for your business.

8. If some settings should be different for a specific business unit, department, template, or form, use the Options buttons to override the general settings you have made. Select the checkbox next to each setting that you want to override. If the same setting is overridden for both an asset and in the business structure, the asset's overrides will have a higher priority.

More information:

- [PrintUI page on Zendesk](#)
- [PrintUI page for designers](#)

Jobs

A job represents a customization of a template. A job is created as soon as a user selects a template to be customized.

You can use this page to display your user's jobs sorted in one of several ways.

- **By relevance** shows you which jobs need your attention the most.
- **By status** shows you the jobs categorized by their status.
- **By date submitted** shows you the jobs in the order that they were created or submitted.
- **By job name in ascending order** and **By job in descending order** show the jobs alphabetically.

Note that jobs typically expire after one year and are automatically removed from the list. However, if a user begins customizing a job but never clicks on the Finished button, the job will expire after one week. If the user later resumes editing the job within the week and clicks the Finished button, the job will be saved for one year. To see deleted and expired jobs as well as all the current jobs, you can create a Jobs report on the [Reports page](#). You can also see a quick summary of the jobs from the "more" menu (with a ⋮ icon) at the top.

By using the fields at the top of the page, you can restrict the jobs that are shown to a range of dates, or you can search for jobs (and other things) based on almost anything in the search bar.

Jobs can be shown either in a grid or a list view.

Users

PrintUI Versus BrandingUI Users

This might be a bit confusing, but there are actually two separate types of user accounts in the BrandingUI world. There are those that PrintUI manages that are used for uploading, testing, and managing templates; and there are those that you manage yourself that are used to sign into your BrandingUI site. You would typically use PrintUI user accounts for your designers and BrandingUI user accounts for those that use this site. Each BrandingUI site has its own separate list of users. So if you happen to run more than one BrandingUI site, each will have its own list of users. The reason why we have two types of accounts is to give you complete control over your BrandingUI users and to prevent a user from accidentally (or maliciously) changing or deleting templates.

When you first started your BrandingUI subscription, you were given a special PrintUI account with a login and password for uploading and managing templates. It just so happens that you can use those same credentials to log into your BrandingUI site as an administrator.

Note that it is not necessary for a designer to have BrandingUI credentials at all. In other words, you could have one or more designers that upload and manage your templates but they cannot log into BrandingUI unless you let them by adding them to the Users page. Also note that you cannot add a user to BrandingUI that will allow them to upload or manage templates. You will have to do that through PrintUI by going to admin.w2p-tools.com and clicking on the **Request a new account** link.

Your Users

This is a list of users that have been specifically approved or disabled from accessing your site. You may assign the users to various roles:

- Someone with the **User** role is able to sign in as an end user to create and manage jobs.
- **Administrator** users are able to log into these administration pages to manage this BrandingUI site.
- **Approver** users can approve jobs submitted by other users. This is done by first setting up a business structure in the Global Settings page, and then assigning users and approvers to specific departments or business units. In addition, approvers can be set up to approve jobs for multiple departments or business units, or departments or business units other than their own.

- **Guest** users temporarily have a User role until their account expires after the number of days specified on the General/Options page with the **Guest account duration** setting under Miscellaneous Options.
- **Disabled** users are blocked from signing in. Note that when a user requests a new account on the Sign In page, they are initially set to Disabled. It is up to you to change their role as appropriate.

Your users can also have more than one role. For example, their role could be both **Administrator & User**.

You can view the entire list of all of your users or you can view them by department by selecting **Users by Department** in the dropdown list at the top. In addition, you can see which departments are assigned to approvers by selecting **Approvers by Department**. This can be especially useful to ensure that you have approvers that can cover every department.

If end users request a new account on the Sign In page, an email will be sent notifying you of the request. You may also create a new user account manually by clicking on the **Manually add a new user** link from the "more" menu (with a ⋮ icon) at the top of the page.

You may import users by clicking on the **Import Users** link or export them by clicking on the **Export Users** link.

Your site is set up so that users can be authenticated by some external system. If that system then passes a user to BrandingUI, they can avoid having to sign in again. You can use the **Authentication test** link to test that this is working properly.

If you would like to see how your BrandingUI site appears to a specific end user, click on the **View As** button after selecting the user.

Note that if emails to your users bounce or if they are reported as being abused, the user's account will automatically be disabled and you will be notified. Please see Bad Email Addresses for more details.

To search for users, use the global search field at the top of the page.

User Account Creation Rules

Normally when end users request a new account on the Sign In page, an email will be sent notifying you of the request. You must then sign in as administrator and change their status from Disabled to whatever is appropriate. However, you could instead use these Automatic Rules to automatically approve new account requests if the requestor's email contains a certain string. The **User** role is used for automatically approved accounts.

Note, however, that if anyone requests an account that is not covered by these rules, you will still receive a notification email.

Selecting the **Send a verification email to new users** checkbox causes an email to be sent to new users to verify that their email address is a real one. Using this setting weeds out spammers and email addresses that haven't been set up properly. The user's account is marked as Verify on the Users page until the user clicks on a confirmation link in the verification email that they receive. If they don't respond within seven days, the user account is automatically deleted.

Example 1

Let's say that IBM is one of your clients and that you would like anyone from IBM to be able to sign in without delay. By setting the **Signin Contains** field to **@ibm.com**, anyone who requests a new account on the Sign In page will automatically be approved as a User. In addition, you could use the **Categories** settings to specify that email addresses containing **@ibm.com** are only to see the templates that you have created specifically for IBM.

Example 2

Let's say that you have a specific list of people that you'd like to automatically approve. You can enter each of their email addresses in the **Signin Contains** fields so that only those people are automatically approved. Perhaps you would like to limit automatic approvals to only two email addresses: george@ibm.com and mary@xyz.com. You would create two rules, one for George and one for Mary, that contain their entire email address.

Example 3

Let's say that you want anyone to be able to use your site. You can create a rule with just **@** (the "at" sign) in the **Signin Contains** field. Since every email address contains the "at" sign, all accounts will automatically be approved and you will be able to see their account information in the Your Users section of this page.

Bad Email Addresses

When we send an email, we use the SMTP protocol to ask our email provider to send it for us. Our email provider's servers pass the email to another email server that matches the domain of the email. For example, for an email address of john@xyz.com, the domain is "xyz.com". If something goes wrong, the email server for xyz.com will return an error message. In some cases, it is just a temporary problem and attempts will automatically be made to try again later. But in other cases, the problem is permanent, such as when the receiving email server does not recognize the email address. And sometimes some email providers has determined that there have been complaints about spam or other abuse. Note that you will not be notified that an email address is bad if the problem is just temporary.

For the more serious problems you may be able to get the problem fixed. Someone would need to work with the email hosting provider that is associated with the domain of the bad email address (i.e. wherever the user signed up to get their email account).

Once you believe that the problem is fixed, an administrator must go to the Notifications settings page and click on the Test Email button to send a test email. If the email now succeeds, the email address will be removed from the list of bad email addresses. If it fails, it will stay in the list. Keep in mind that **there is no other way to remove a bad email address from the list**, so attempting to use the bad email address in any other way will result in failures.

Note that our email provider requires us to limit how many bad emails we send. That is why we must block attempts to send emails for bad email addresses.

Here's an Example

John starts work at the XYZ Company and is assigned the email address of john@xyz.com. Because the XYZ Company uses BrandingUI, he immediately signs up for his BrandingUI account using john@xyz.com. However, the email account is still in the process of being set up so it isn't yet working. Unfortunately, though, BrandingUI has already attempted to send an email to john@xyz.com, but the email immediately bounces with a permanent "not found" failure message from the XYZ Company's email servers. Now that john@xyz.com is on the BrandingUI list of bad email addresses, all further attempts to send emails to that email address from BrandingUI will fail.

Later, the john@xyz.com email account finally gets set up and you are able to successfully send John emails from your own Gmail account, so you know it's good. To fix it in BrandingUI, you sign in as administrator, go to the Notifications page, and use the Test Email button to send a

test email to john@xyz.com. The email succeeds so the email address is removed from the list of bad emails.

Business Structure

A number of features of BrandingUI depend on there being a defined business structure. By default, the assumption is that the structure will consist of business units and departments. However, the **Labels** settings let you use different names that make sense for your organization. For example, a university might have colleges and departments.

To add a new business unit, enter a business unit name in the field at the bottom of the page. Also add an abbreviation for the business unit. Once you have added one or more business units, add a department within each one by entering a department name and its abbreviation.

You can change the order of the business units and departments by dragging them to a new location. And if business units or departments merge at some point, you can use the Merge button at the bottom of the page to do that.

Business Options

You may override certain settings and options for a specific business unit or for a specific department. In other words, for just that business unit or department, you can pick different settings and options than in the **Global Settings**. To do so, click on the Options button next to the business unit or department and then select what type of setting you want to change. Then put a checkmark next to a setting that you wish to override. Note, though, that if you also use Template or Form options that they will take precedence over these settings.

You may use the **Remove all options** from the "more" menu (with a ⁝ icon) to reset all of the settings to their defaults.

General Settings

Note that many settings can be overridden on a template-by-template, form-by-form, or department basis. Use the **Options** buttons that you see on the Assets and Business Structure pages.

Contact

The contact information on this page is very important. If the user needs to contact you for any reason, they will likely use the Contact page to do it, which results in an email sent to the **Business email**. The settings here also specify a physical address that your users will see.

In addition, the **Business email** setting is used as a fallback for some notifications if specific notification emails have not been specified.

User Downloads

You may want to provide some files that your end users can download. For example, perhaps you want to provide a JPEG of your company's logo or a short training video. You can use this section to create download categories and to upload the files you want to provide in each category. End users will see these files on their Home page once they sign in.

Editors

PrintUI supports three different editors that can all be used with the same set of templates that you have uploaded to the PrintUI servers.

- The **Full-featured HTML5 Web Editor** was introduced in 2018. It has many editing features and advanced typography. It is a pure HTML5 editor that does not require Flash.
- The **Full-featured Flash Web Editor** is our original editor introduced in 2012. It also has many editing features and advanced typography. This editor requires that Flash be enabled in the user's web browser. (Note: as of December 31, 2020, the Flash editor will no longer be supported.)
- The **Simple HTML Web Editor** uses a simple forms based approach and has fewer features than the other editors. It is suitable for simple editing tasks and for mobile

devices such as phones because of its responsive design. It is a pure HTML editor that does not require Flash.

You can choose which editors to enable. BrandingUI will automatically select the appropriate editor to use based on things such as whether Flash is enabled or not, or the size of the screen. Note that in some cases the Simple HTML Web Editor will be used even if it is not enabled simply because it may be the only editor that will work in the user's web browser.

By clicking the Settings buttons, you can configure each editor. You can restrict what the user is able to change, or you can give the user the freedom to make almost any type of change.

Options

The Options page has three sections of settings.

Miscellaneous Options

When you or your users log into your BrandingUI site, they will see your logo at the top of the page. You may upload an image by clicking on the **Upload** button. Your logo image can be up to 222 pixels wide and up to 78 pixels tall and the image type can be JPEG, PNG, or GIF. You may also specify what happens when a user clicks on that logo by specifying a URL. By default, the value is "/" which means that it should go to your BrandingUI home page. But you could use a URL to your own web site such as **http://xyz.com**. (Be sure to include the "http://" part.)

By default, the background of your BrandingUI site pages is gray. However, you can use the **Background image for pages** setting to specify an image to use instead. For best results with most browsers, your background image should be at least 1920 pixels wide and 1080 pixels tall and the image type can be JPEG, PNG, or GIF.

Guest accounts temporarily have a User role until their account expires after the number of days specified using the **Guest account duration (days)** option. Go to the Users page to choose which users should have a Guest role.

User Home Page Options

You can show a message to all of your users by using the **Title and message for every user's Home page** options. Users will see these on their Home page right after they sign in.

For first-time users that have never created a job, you can show them tips about how to do that on their Home page. If your users don't need tips, or if you are providing tips of your own, you can turn off the generic tips by using the **Show tips to users with no jobs** setting.

Assets

You can specify which types of assets will be shown to your users. If you never use forms, for example, you could turn them off. Note that you can override these settings on a user-by-user basis on the Users page.

Localization

The Localization page has two sections of settings.

Site Locale

When **Use browser locale** is set to Yes, the site will attempt to use the locale specified by the web browser. However, if that particular locale is not available, the site will use the specific locale settings.

You can specify a language and how you want numbers and dates to be formatted for your site. You can also specify these on a user-by-user basis on the Users page. Users can also pick their own locale settings from the My Account page.

Editor Locale

To give you flexibility, the editors can use different languages than the site does. One reason for this is that the translations for the editors and for the site have been done at different times, some being more complete than others. However, you can also set **Use site locale** to Yes. This is especially useful if you have specified that the site should use the web browser's locale.

Notifications

There are three sections of notification settings.

Note that it is very important that you use valid email addresses. If you try to use an invalid email address, you will be notified to change it.

Since emails can sometimes be intercepted by spam checkers, the Test Email button at the top lets you send a test email to see if it can get through. If you have been notified that an email address is not valid, you or your hosting provider may be able to fix it. Once it has been fixed, please use the Test Email button to send a test email to check that it is now working correctly and to remove it from the "bad email" list. For more information about how to deal with bad emails, click here.

Site Notifications

Email addresses related to this site:

- After an end user clicks on the **Request an account** link on the Sign In page, and after they enter their user information, an email is sent to the addresses shown for the **Email addresses to approve new accounts** settings. To approve the new account, log in as administrator, select Users at the top of the page, and change the user's status from **Disabled** to **User**. If blank (i.e. no email addresses specified), the **Business email** under **Contact** in General Settings will be used instead.
- When a user clicks the Submit button on the Contact page, an email is sent to the addresses shown for the **Email addresses for information requests** option. The email contains all of the information supplied by the end user. If blank (i.e. no email addresses specified), the **Business email** under **Contact** in General Settings will be used instead.
- When an administrator changes the category for a template or form, you can use the **Notify users when a template or form category changes** to send an email to every user to let them know it changed.

Job Notifications

Whenever the status of the user's job changes, use **Notify owner whenever the job status changes** to notify the owner of the job of the status change.

You may specify how often your users should get reminder notifications to approve or complete their jobs by using the **Send job reminders** settings. You may turn reminders off completely, or you can specify how many days to wait as well as the days of the week on which they should be

sent. If a reminder is due to be sent on a day that you have skipped, it will instead be sent on the next available day.

Approvals

The completion method that a user selects for a job will determine whether approvals are needed or not. An administrator specifies this when they create the completion method on the Completion settings page.

Job Approvals

For jobs that do require approvals, BrandingUI will look for users with the role of Approver that are in the same Department or Business Unit as the user submitting the job. If none are found, emails will be sent to the addresses shown for the **Default approver emails when no Approver for department**.

- The **Approver download types** specify what types of results an approver can download.
- For PDF downloads, set **Let approver select PDF preset when downloading** to Yes to allow the approver to specify how to format the PDF file. This might be useful, for example, if the approver needs to see where crop and bleed marks are placed. In that case, they would select a PDF preset that specifies the crops and bleeds. If **Let approver select PDF preset when downloading** is set to No, specify a PDF preset using **Select PDF preset for approvers**.
- For JPEG and PNG downloads, use the **Set resolution for JPEG/PNG approver downloads** to specify the image size that the approver will see. The value is the maximum width or height of the image in pixels. A value of zero indicates that the image will be the width and height specified by the template designer.
- You can use **Jobs require N level(s) of approvals** to specify that the job is to go through several layers of approvals. All required approvals for one level must be completed before the next level of approvers get notified.
- **Level N default approver emails when no Approver for department** specify the email addresses to use if no approvers can be found in the user's Department or Business Unit. Use **Approval requires N approver(s)** to specify how many approvals are required for each level. Note that if no email address is specified for a level, the **Business email** from the General/Contacts page will be used for the approval notification for that level.
- You can use **Message for approver email** to specify a message to include in the emails that are sent to approvers.
- If **User can select approvers from a list when job is submitted** is set to Yes, the user will be given a choice of which approvers to use as they are submitting their job. If **Restrict approvers to user's department** is set to No, the user may also specify additional email addresses for approvals even if those email addresses belong to people outside of their Department.

- Use **Allow approvers to edit jobs** to give approvers the ability to edit a job. This could be useful if the approver can make corrections to a job to avoid going through the process of rejecting the job and having the user make corrections and then resubmitting.
- To avoid jobs getting stalled due to waiting for approvals, use the **Automatically approve job after N day(s)**.

Remember that you can override these settings by specifying different approvers and other approvals on the Template or Form Asset pages by clicking their respective **Options** button. Similarly you can specify different approvers for specific departments on the Business Structure page by clicking the **Options** button there.

Submissions Settings

Template and Form Options

By using the **Template or form subcategories** setting, you can specify whether the subcategories should initially be shown expanded or collapsed to make the list easier to navigate.

The **Allow resizing** setting allows you to specify whether your users can specify a new page size for a template at the time they select a thumbnail on the Templates page. However, in order for a template to be resizable, you must use Liquid Layout in InDesign to mark all pages in the template as scalable. In addition, all pages in the background layer must be unlocked. Once you specify **When user selects template** you will see that you can also specify a minimum and maximum percentage by which the template can be resized. Be sure that any images that you put in your resizable templates have sufficient resolution for the maximum percentage. Note that you can override this setting on a template-by-template basis using the **Change Options** button on the Template Asset page.

Submission Options

The **Require the Reference field for job submissions** settings controls whether or not a user must enter some text into a "reference" field when a job is submitted. The text is arbitrary and can be anything that is meaningful to people that later view the job details.

The **Let user download a PDF proof** setting controls whether or not a user can download a PDF of their customization before submitting the job. You must also specify a PDF preset that should be used for this purpose. Typically a low-resolution preset such as "Smallest File Size" would be appropriate. In addition, you may also specify a watermark for the proof using the **Watermark text for PDF proof** setting along with a size and color.

The **Use proof watermark for approver PDFs** setting indicates that the watermark should also be applied to PDFs downloaded by approvers (regardless of whether the **Let user download a PDF proof** setting has been enabled).

The **Submission instructions** option allows you to customize the instructions to your end users on the Job Submission page. The Submission page appears if a job requires approvals or if there are some required fields for jobs that will be immediately downloaded by the end user.

Completion

Methods

After your end users finish customizing a template or form, the job can be completed in a number of ways by using one or more job completion methods. There are a few default completion methods, but you can change them or add more in the **Add a new method** section. Name each completion method in a way that means something both to you as well as to your end users.

The **All Job Completion Methods** section shows all of the completion methods that you have created. Although all completion methods are defined here, they can be used in three places:

- Here in the Global Settings to be used as the defaults for jobs.
- In the Business options to override the Global Settings for users that belong to a specific Business Unit or Department.
- Or in the Template or Form options to override both the Global Settings and Business options when the user selects a specific template or form.

Note that you can have multiple job completion methods of the same type. For example, you may want some people to be notified for certain departments and other people notified for other departments. You could create two completion methods of the type "Notify someone to download files" and then use the Options button on the Business Structure page to specify which completion methods should be used for which department.

You can specify whether some completion methods require that someone approve the job. If a job does require approvals...

- Approvers will first be assigned from the same Department as the user.
- If none are found, Approvers will be assigned from the Business Unit for the Department.
- If none are found, the default approvers from any enabled Template (or Form) options will be used.
- If none are found, the default approvers from any Business Structure options will be used.
- If none are found, the default approvers from the Approvals Settings will be used.
- If none are found, the contact email from the General Settings will be used.

Which Completion Methods the User Will See

When a user creates a new job, you can control which completion methods that they can use. When you add or edit a completion method, or in the **All Job Completion Methods** section, you can specify a completion method to be used by default unless overridden in the template options. You will need to also create any output methods that will be used for the template options.

Completion Methods for Templates

- In all cases, you will specify the file types that are allowed to be downloaded along with which PDF preset should be used for PDFs and what size that JPEGs should be, in pixels. Using a value of zero for the JPEG resolution indicates that the image should be governed by the size of the template itself.
- In most cases, you will specify whether the job requires approval or not.
- **Notify someone to download files** lets you specify email addresses for whomever should download the results. Note that the email address does not need to be one of your end users. For example, it could be the email address of a print shop.
- **Transmit files via FTP** lets you transmit a ZIP file containing the results via FTP. An XML file is also included in the ZIP that has the job details. You just specify the FTP server, user, and password. Note that if you select the **SSL** checkbox, "explicit SSL" will

be used (i.e. SSL over port 21). The Test button allows you to make sure that the FTP site is accessible.

- **Transmit files via the Internet** lets you transmit a ZIP file containing the results via an HTTP POST to the specified URL. You may include query parameters in the URL. Note, however, that a "c=<your client ID>" query parameter will automatically be added to the URL at the time of the transmission. If your destination server supports HTTPS, be sure to prefix the POST URL with "https://". An XML file is also included in the ZIP that has the job details. The Test button allows you to make sure that the Internet destination is accessible.
- **End user downloads** lets the end user download the results themselves. If approvals are required, the end user gets an email notification that the results are ready to download. If approvals are not required, the end user can download the results immediately after editing.
- **Approver downloads final results** lets an approver both approve the job as well as download the final results.

Completion Methods for Forms

The completion methods for forms are similar to those for templates except that it is not necessary to specify file types since there is only one type of form. In addition, there are no email completion methods.

Other Options

It may sometimes be useful to let someone know about all the jobs that are being generated on the site. By using the CC Options, an email is sent to up to three email addresses that contain some information about each job as well as a link where they can view, but not change, the job. The email is sent once the job has been approved. **CC the final results** is where you specify the email addresses. If you don't want to use this feature, just leave all three blank. Use the **CC download types for templates** settings to specify which types of downloads you want to show when they click on the link in the notification email. And for PDFs, the **PDF preset for CC's** settings indicates what PDF preset should be used for their downloads.

Include category in download name indicates that a prefix should be added to the file names of final output (e.g. PDFs, JPEGs, etc.) with the category that the user selected on the Templates or Forms pages.

The **If no action has been taken, automatically mark job as completed after N day(s)** setting is used to prevent jobs from hanging around as incomplete forever. It also prevents users from continuously receiving reminder emails to complete the jobs.

Image Galleries

Image galleries show collections of images (i.e. JPEGs, PNGs, etc.) that the user can use when they are adding or replacing images in a job while editing a template. In addition, you can use a large image to cover the entire background of a page.

Gallery Settings

The **Gallery Connector URL** specifies the address to a PrintUI gallery connector. It is used to expose your images to end users so that they can select and use them during their customization session. Gallery hosting can be purchased from PrintUI or you can develop your own. See the PrintUI Gallery development documentation for more information.

The **Gallery qualifiers XML** is optional and used to pass an arbitrary set of key/value pairs to your connector. You might use a qualifier, for example, to supply one set of images to one template, but a different set of images to another template. See the PrintUI Gallery development documentation for more information. BrandingUI also supports special tokens that are substituted at run-time:

- Use $T if you want to substitute the template name.
- Use $U if you want to substitute the end user's email address.
- Use $UD if you want to substitute the domain portion of the user's email address (i.e. the part after the "@" symbol).
- Use $ID if you want to substitute the end user's ID. (If the user has not signed in, it will be blank.)

For example, you might use **<qualifier><key>template</key><value>$T</value></qualifier>** for the template qualifier.

Set **Allow user to upload images** if you want end users to be able to upload images from their own computer rather than selecting an image from a gallery.

Specify **Social galleries** if you want the end users to be able to select images from their own social media accounts such as Box, Dropbox, or Google accounts. Note that you can select more than one social media account by clicking on each one while holding the Ctrl key on Windows or Command key on Macintosh.

Set **Allow image filtering** if you have a gallery that can filter its results based on the frame name and keywords specified in the PrintUI Frame Options or PrintUI Tags panel in InDesign at the time the template was designed.

Gallery Settings for Backgrounds

If your template is designed to use an image as a replaceable background for an entire page, you can use a gallery to show new background images to the user. These settings are similar to those used for the **Gallery Settings** above but would normally point to a different connector URL that is more appropriate for background images.

Base Fonts

The fonts that will be shown in the font dropdown menu within the editor for your template are a combination of any "base fonts" as well as any font shown when you use Type/Find Font within InDesign. Base fonts are defined at https://admin.w2p-tools.com. These are fonts that you would like to show to all of your end users for every template. Note, though, that you shouldn't specify a large number of base fonts because the editor's performance will suffer as it loads them all when the editor is first loaded. Another way that you can show additional fonts in the font dropdown menu is to create an off-page text frame where you put multiple lines of text, each with their own font. Because it is off-page, it will not appear in the editor, but the fonts will be included when you use Type/Find Font within InDesign. The advantage of this method is that the font list is specific to that particular template.

Editors

HTML5 Web Editor

These options give you control over the customization experience that your end users have when they are working with your templates in the PrintUI web application. The default settings allow end users to have quite a bit of freedom in the things they can change. However, you may want to more rigidly control the look and feel of the design by restricting what they can change.

For example, you may want to retain tight branding controls by requiring users to select styles for text instead of fonts. Or you may want to disable their ability to add new images or new text, which would restrict them to just changing the existing images and text in the template. Or you may want to restrict them to using the color palette specified in the document instead of letting them also pick from generic colors.

Branding Controls

- **Show the "Add Image" button** Specifies whether to show the Add Image button.
- **Restrict options in image palette** Restricts the number of things the user can change for images..
- **Show the "Add Rectangle" button** Specifies whether to show the Add Rectangle button.
- **Show the "Add Text" button** Specifies whether to show the Add Text button.
- **Show the text palette when editing text** Specifies whether to show the text palette when editing text. Turning this off prevents users from changing fonts and other text styling.

- **Font size slider maximum (points)** While editing text, specifies the maximum value of the font size slider.
- **Character size for Glyphs palette (points)** Specifies how large the characters should be on the Glyphs palette.
- **Show styles or fonts in text palette** Specifies whether to show fonts or styles on the text palette. When using styles, only text styles defined in the template can be used to change text attributes.
- **Automatically use styles palette for tables** When editing a table, automatically use the styles the designer specified for the table. Note that you will not be able to add or remove columns unless this is enabled.
- **Resize all columns when adding or removing columns** Specifies whether adding and removing table columns causes all columns to proportionally resize to fit the table to the text frame width.
- **Show the "Preview" button** Specifies whether to show the Preview button. Clicking this button shows a JPEG of the page as rendered by the InDesign Server.
- **Preview non print layers** Specifies whether to include the non-printing foreground and background layers when requesting a JPEG preview from InDesign Server. When the value is YES both non-printing layers show. Foreground means only the foreground shows. Likewise for background layers.
- **Show non print layers** Specifies whether to show the non-printing foreground and background layers while editing. When the value is YES both non-printing layers show. Foreground means only the foreground shows. Likewise for the background layers.
- **Colors to show in color picker** Specifies whether to show only document colors or to also show generic colors in the color picker. You can also specify which document colors to use in the second dropdown.
- **Allow typing a color value** Specifies whether a hexadecimal color value can be entered by the user to specify a color.
- **Allow pages to be added or removed** Specifies whether pages can be added and removed and whether the content can be changed by applying a new master page.
- **Allow pages to be moved** Specifies whether pages can be reordered by dragging the page thumbnails.

Images

- **Use actual size for new images** Specifies whether placed images are shown at the full defined dimensions, or at relative size to the page. Does not apply to vector images such as EPS or AI.
- **Limit image resize** Specifies whether images added by the user should be checked to make sure they meet the minimum resolution.
- **Minimum image resolution when resizing** Specifies the minimum resolution to use when resizing images. The image will be scaled down if the resolution drops below the specified amount.

Text

- **Resize behavior for new text frames** Specifies the resizing behavior of new text frames added to the app while editing. Text frames that resize will fit themselves to the text in width, height, or both.
- **Width of new text frames** Specifies the initial width of text frames added to the canvas. Default is "200".
- **Height of new text frames** Specifies the initial height of text frames added to the canvas. Default is "30".
- **Add drag handles to expandable text frames** Allows auto-expand text frames to be scaled by dragging the corners and sides.
- **Add a border when editing table cells** Specifies whether borders appear around table cell boundaries when the border has no stroke.

Labels

- **Finished button label** The text that should be shown on the "finished" button in the editor.
- **Cancel button label** The text that should be shown on the "cancel" button in the editor.
- **Cancel alert message** The text for the "are you sure" message that should be shown if the user clicks on the Cancel button.

General

- **Initial page to show in editor** Specifies the page number to show in the editor when it is launched.
- **Allow user to select which page to edit** If set to "No" the page selection thumbnails are not shown. This prevents the user from editing any page other than the one shown when the editor first launches.
- **Zoom to fill screen** Specifies whether the template entirely fills the application area. When the value is NO, it will open at "actual size".
- **Initially show all editable objects** Specifies whether editable items should be highlighted when a template loads. The highlights show by default to make editing more discoverable.
- **Allow selection of non-selectable objects** The template designer can specify that certain text or images should not be edited by end users. This setting overrides that intent.
- **Percent opacity of items that extend off page** Specifies how transparent objects should look when they extend beyond the page bounds. The opacity ranges from 0 to 100.
- **Vertical guides (in points)** Causes the editor to draw vertical lines on the pages where specified.

- **Horizontal guides (in points)** Causes the editor to draw horizontal lines on the pages where specified.
- **Auto save interval (seconds)** How often the editor should automatically save the changes made by the user. Note that frequent saving can affect performance for the user.

Simple HTML Web Editor

These options give you control over the customization experience that your end users have when they are working with your templates in the simple HTML web editor.

Labels

Finished label button is the text that should be shown on the Finished button in the editor.

General

Preview image resolution specifies the resolution to use for the page preview image in pixels. It may be any value between 400 and 10000, with a default of 1200.

Flash Web Editor

These options give you control over the customization experience that your end users have when they are working with your templates in the PrintUI web application. The default settings allow end users to have quite a bit of freedom in the things they can change. However, you may want to more rigidly control the look and feel of the design by restricting what they can change.

For example, you may want to retain tight branding controls by requiring users to select styles for text instead of fonts. Or you may want to disable their ability to add new images or new text, which would restrict them to just changing the existing images and text in the template. Or you may want to restrict them to using the color palette specified in the document instead of letting them also pick from generic colors.

Branding Controls

- **Show the "Add Image" button** Specifies whether to show the Add Image button.

- **Restrict options in image palette** Restricts the number of things the user can change for images..
- **Show the "Add Rectangle" button** Specifies whether to show the Add Rectangle button.
- **Show the "Add Text" button** Specifies whether to show the Add Text button.
- **Show the text palette when editing text** Specifies whether to show the text palette when editing text. Turning this off prevents users from changing fonts and other text styling.
- **Character size for Glyphs palette (points)** Specifies how large the characters should be on the Glyphs palette.
- **Show styles or fonts in text palette** Specifies whether to show fonts or styles on the text palette. When using styles, only text styles defined in the template can be used to change text attributes.
- **Automatically use styles palette for tables** When editing a table, automatically use the styles the designer specified for the table. Note that you will not be able to add or remove columns unless this is enabled.
- **Resize all columns when adding or removing columns** Specifies whether adding and removing table columns causes all columns to proportionally resize to fit the table to the text frame width.
- **Show the "Preview" button** Specifies whether to show the Preview button. Clicking this button shows a JPEG of the page as rendered by the InDesign Server.
- **Show non print layers** Specifies whether to show the non-printing foreground and background layers while editing. When the value is YES both non-printing layers show. Foreground means only the foreground shows. Likewise for the background layers.
- **Preview non print layers** Specifies whether to include the non-printing foreground and background layers when requesting a JPEG preview from InDesign Server. When the value is YES both non-printing layers show. Foreground means only the foreground shows. Likewise for background layers.
- **Colors to show in color picker** Specifies whether to show only document colors or to also show generic colors in the color picker. You can also specify which document colors to use in the second dropdown.
- **Allow typing a color value** Specifies whether a hexadecimal color value can be entered by the user to specify a color.
- **Allow pages to be added or removed** Specifies whether pages can be added and removed and whether the content can be changed by applying a new master page.
- **Allow pages to be moved** Specifies whether pages can be reordered by dragging the page thumbnails.

Images

- **Use actual size for new images** Specifies whether placed images are shown at the full defined dimensions, or at relative size to the page. Does not apply to vector images such as EPS or AI.

- **Limit image resize** Specifies whether images added by the user should be checked to make sure they meet the minimum resolution.
- **Minimum image resolution when resizing** Specifies the minimum resolution to use when resizing images. The image will be scaled down if the resolution drops below the specified amount.

Text

- **Resize behavior for new text frames** Specifies the resizing behavior of new text frames added to the app while editing. Text frames that resize will fit themselves to the text in width, height, or both.
- **Width of new text frames** Specifies the initial width of text frames added to the canvas. Default is "200".
- **Height of new text frames** Specifies the initial height of text frames added to the canvas. Default is "30".
- **Add drag handles to expandable text frames** Allows auto-expand text frames to be scaled by dragging the corners and sides.
- **Add a border when editing table cells** Specifies whether borders appear around table cell boundaries when the border has no stroke.

Labels

- **Finished button label** The text that should be shown on the "finished" button in the editor.
- **Cancel button label** The text that should be shown on the "cancel" button in the editor.
- **Cancel alert message** The text for the "are you sure" message that should be shown if the user clicks on the Cancel button.

General

- **Zoom to fill screen** Specifies whether the template entirely fills the application area. When the value is NO, it will open at "actual size".
- **Initially show all editable objects** Specifies whether the Edit buttons on editable items show when a template loads. The Edit buttons show by default to make editing more discoverable and are shown until the user hovers over an editable item.
- **Allow selection of non-selectable objects** The template designer can specify that certain text or images should not be edited by end users. This setting overrides that intent.
- **Percent opacity of items that extend off page** Specifies how transparent objects should look when they extend beyond the page bounds. The opacity ranges from 0 to 100.
- **Vertical guides (in points)** Causes the editor to draw vertical lines on the pages where specified.

- **Horizontal guides (in points)** Causes the editor to draw horizontal lines on the pages where specified.
- **Auto save interval (seconds)** How often the editor should automatically save the changes made by the user. Note that frequent saving can affect performance for the user.
- **Show the warn overset text when finishing** Specifies whether to Show the warn overset text when finishing.
- **Show the "Full Screen" button** Specifies whether to show the full screen button or not. Clicking this button fills the screen with the editor.
- **Show undo labels** Specifies whether to show "Undo" and "Redo" within the undo and redo buttons. When the value is NO, the labels are shown as a tool tip.
- **Show the "Start Over" button** Specifies whether to show the Start Over button. Clicking this button completely resets the template and erases all of the user's edits.
- **Select colors with eye dropper** Specifies whether color can be changed by using an eyedropper to pick up colors from anywhere while editing.
- **Show editor border** Show a border around the editor.

PDF Presets

You may upload one or more PDF presets. These are **joboptions** files that you create using InDesign.

Templates

This is a list of all the templates that you have uploaded using the PrintUI plugin for InDesign. If you have many templates, it can be useful to use the search field to narrow down the ones of interest.

To get information related to creating and uploading templates, go to https://printui.com/easyprintui-info.php and sign in using your PrintUI credentials--the ones you would use to upload templates using the PrintUI InDesign plugin. Note that your PrintUI credentials are not necessarily the same as your BrandingUI credentials.

Change Categories

You must assign your templates to categories in order for them to appear to end users. In other words, any template that shows **None** as the category, will not be shown. To assign templates to categories and subcategories, first checkmark one or more templates. Then click on the Change Categories button at the bottom of the page. You may use arbitrary names for your categories and subcategories except that you may not use commas, asterisks, or underbars.

Once you have assigned your categories and subcategories to your templates, you can specify which categories and subcategories are shown to your users by going to the Categories sections on the Users page.

Change Options

You may override many Global and Business settings on a template-by-template basis so that you can better control the end-user experience. Select one or more templates and then click on the **Change Options** button to select what type of options you would like to change. Then use a checkmark next to the settings that you want to override.

You can also select the **Remove all options** choice after clicking **Change Options** to remove all of the overrides for the selected templates.

Once you have changed any of the template options, an "information" icon ☐ will appear for that template in the template list.

Change Keywords

You can assign keywords to the templates. Keywords are arbitrary text strings that are used to aid your users in finding certain templates. Although this is similar in concept to categories and

subcategories, the keywords are not displayed to the user. However, if the user does a search, the keywords will be checked for a match.

More

The "more" menu (with a ⋮ icon) at the top of the page allows you to:

- **Rename template categories** Allows you to rename the categories. This is useful if you want to change the category list that users see on their Templates page.
- **Refresh the list** If someone has uploaded any new templates recently, you can refresh the list to include them.

Some other things you can do at the top of the page are to search for template names that contain the search string, or you can filter the list by category and subcategory. From the dropdown menu, you can show the templates in a number of ways:

- **All templates** shows every template.
- **All templates with categories** shows only the templates that have categories.
- **All templates with no categories** shows only the templates that you have not yet categorized. This is especially useful after you have uploaded some new templates.
- **Templates with options overrides** shows only the templates in which you have specified some settings specific to the template. One way that this can be useful is if you are debugging a workflow problem with certain templates. You may have applied a template option that changes the workflow.
- **Recently added** shows only the templates you have uploaded within the last 30 days.

Template Categories

Categories are useful not only to organize your templates, but also when you want to show some of your users one thing, but other users something else. For example, let's say that you are a small design agency with two clients, ABCorp and XYZ Partners. You don't want ABCorp end users to see the XYZ templates, or vice versa. You can accomplish this by putting all of the ABCorp templates into an **ABCorp** category, and all of the XYZ templates into an **XYZ Partners** category. Then inCategories for Templates on the Users settings, specify that users with email addresses containing **@abcorp.com** can only see the ABCorp templates, and that users with email addresses containing **@xyzpartners.com** can only see the XYZ templates. You can use whatever subcategories that you want. In fact, both the ABCorp and XYZ Partners categories could even have exactly the same subcategories if you want. When an ABCorp user looks in the "By..." dropdown on their Templates page, they might see something like this:

- ABCorp
  - Business cards
  - Fax cover sheets
  - Letterhead

But an XYZ Partners user would instead see something like this (if the "Fax cover sheets" subcategory was not being used):

- XYZ Partners
  - Business cards
  - Letterhead

(Also see the help topics for the Users settings page for additional details.)

Another Example

Templates may be assigned to more than one category. For example, you may have created a generic design for a business card that is also part of a stationary set containing a matching letterhead and an envelope design. You might assign the business card template to both the **Business Cards** category as well as the **Stationary Sets** categories.

And templates may also be assigned to one or more subcategories. Let's say that you name your family of templates for the business card example above as **Elegant**. You could then use **Elegant** as the subcategory for both the **Business Cards** category as well as the **Stationary Sets** category.

If you also have a family of templates called **Plain** and one called **Bold**, the end user might see something like this in the category dropdown on the Templates page:

- All
- Business Cards
  - Bold
  - Elegant
  - Plain
- Stationary Sets
- Elegant
  - Bold
  - Plain

Miscellaneous

Please note that category and subcategory names are case sensitive. So **Business Cards** is a different category than **Business cards** (note the lower case "c"). Also note that names must not use special characters such as an asterisk, underbar, or comma.

There may also be times that you wish to un-categorize a template. To do so, click on the **Reset** button at the bottom of the page.

Variable Data Options

Note that these settings do not have an equivalent on any other settings pages. They are unique to templates.

Using Variable Data Options

You may use these options to allow your end users to merge data from an Excel XSLX spreadsheet file into your template. Here are the steps required to make that work.

- When you design your template, you must "name" the frames where you want the spreadsheet data to go. To do that, click on a text frame shown in the Layers palette in InDesign. You are then able to name the frame to whatever you want.
- Then create an XSLX file that your users can use as a sample. The first line of the file must contain column headers where each header exactly matches the names that you used for the frames. For example, if you name a frame "Address", one of the headers should also be called "Address".
- If you want to restrict the maximum length of the data for data in one column, put a character count within square brackets following the header name. For example, if you want to restrict the address length to 50 characters, set the header in the spreadsheet to "Address[50]".
- Starting at the second line of the spreadsheet, put your sample data.
- Your data will need to be in an XSLX file. If your data is in some other type of spreadsheet file, or in a CSV file, open it in Excel and save it as XSLX.
- Later, when your end user selects the template, a new page will open where they can download your sample spreadsheet. The user can then modify the spreadsheet with their own data before uploading it for the data merge. The editor then appears like normal, except that the first line of data in the uploaded spreadsheet has been merged into the template.
- Approvers will see the same thing as the end user—a PDF that reflects the data merge of the first record plus any additional customizations made by the user while editing.
- Once the job is approved, it is queued for data merge processing. It may take anywhere from several minutes to over an hour to complete the data merge depending on a number of factors including the number of data records, the complexity of the template, and how many other data merges are already queued.
- If you try to download a final PDF prior to the data merge being finished, you will be given details about the job's status.
- You will be notified by email once the data merge has been completed.

Categories For Templates

These settings control which template categories to expose to which users based on their sign in email address or other user criteria. You can choose to greatly restrict what to show to specific classes of users, or, at the other extreme, to show them everything. Note that any users that you do not explicitly specify are covered by the **If no other match** settings.

Before changing these settings, you must have first assigned your templates to whatever categories you want your end users to see when they come to your BrandingUI site. You can do that by clicking on the Assets/Templates link at the top of the page.

Note that if there is a match against multiple criteria that only one of the sources and categories will be used. In other words, there is no effort to merge multiple matches. Also, the criteria are not evaluated in the order shown on the page, but instead or evaluated in the order in which they appear in a database.

Example 1

Let's say that IBM is one of your clients and you have different templates set up for the Marketing Department than you do for the Sales Department. You have put the Marketing templates into a category called **IBM Marketing**. Similarly, you have put the Sales templates into a category that you called **IBM Sales**. Let's also say that there are only two users that are allowed to customize the Marketing templates--mary@ibm.com and john@ibm.com. But you want to let anyone from IBM be able to customize the Sales templates. Your settings might look

something like this:

Which Categories For Templates

Restrict which template categories to show the user once they sign in.

If	Contains	Category	
Email	mary@ibm.com	IBM Marketing	Collapse

Email ⇅	mary@ibm.com	1st	IBM Marketing

Change Copy Remove

The "1st" column indicates which category to show when the user first signs in.

If	Contains	Category	
Email	john@ibm.com	IBM Marketing	Collapse
Email	@ibm.com	IBM Sales	Collapse
Email			Add
	If no other match	All	Expand

Example 2

Let's say that you have lots of templates in several categories, but you only want to show them all to any end users from the United States. For everyone else, you'd like to show just the templates from the General category. Your settings might look something like this:

Which Categories

Restrict which form categories to show the user once they sign in.

If	Contains	Category	
Department	Sales	All	Collapse

Email ⇅		1st	All

Change Copy Remove

The "1st" column indicates which category to show when the user first signs in.

If	Contains	Category	
Email			Add
	If no other match	General	Expand

Other Matches

In addition to matching up to the email address used when signing in, you can also match against other data. The table below gives you some guidelines on how to do that.

Data	Guidance
Name	Anything that makes sense
Company	Anything that makes sense
Departments	From the business structure
Approval departments	From the business structure
Phone	Anything that makes sense
Email	Anything that makes sense
Country	Two-letter country code as defined by ISO 3166
Timezone	Select a time zone from this list
Language	The language as it appears in My Account or in General Settings

Forms

This is a list of all the forms that you have created. If you have many forms, it can be useful to use the search field to narrow down the ones of interest.

To create a form, click on the Create Form button on the Forms page.

Change Categories

You must assign your forms to categories in order for them to appear to end users. In other words, any form that shows **None** as the category, will not be shown. To assign forms to categories and subcategories, first checkmark one or more forms. Then click on the Change Categories button at the bottom of the page. You may use arbitrary names for your categories and subcategories except that you may not use commas, asterisks, or underbars.

Once you have assigned your categories and subcategories to your forms, you can specify which categories and subcategories are shown to your users by going to the Categories sections on the Users page.

Change Options

You may override many Global and Business settings on a form-by-form basis so that you can better control the end-user experience. Select one or more forms and then click on the **Change Options** button to select what type of options you would like to change. Then use a checkmark next to the settings that you want to override.

You can also select the **Remove all options** choice after clicking **Change Options** to remove all of the overrides for the selected forms.

Once you have changed any of the form options, an "information" icon □ will appear for that form in the form list.

Change Keywords

You can assign keywords to the forms. Keywords are arbitrary text strings that are used to aid your users in finding certain forms. Although this is similar in concept to categories and subcategories, the keywords are not displayed to the user. However, if the user does a search, the keywords will be checked for a match.

More

The "more" menu (with a ⋮ icon) at the top of the page allows you to:

- **Add** Allows you to add a new form.
- **Rename form categories** Allows you to rename the categories. This is useful if you want to change the category list that users see on their Forms page.
- **Refresh the list** If someone has uploaded any new forms recently, you can refresh the list to include them.

Some other things you can do at the top of the page is to search for form names that contain the search string or you can filter the list by category and subcategory.

Form Categories

Categories are useful not only to organize your forms, but also when you want to show some of your users one thing, but other users something else. For example, let's say that your company has two departments called Software and Hardware, each with their own sets of forms for human resources and for marketing. Obviously you would want the users to see the right set of forms for the department to which they belong. You can accomplish this by putting all of the Software department forms into a **Software** category, and all of the Hardware department forms into an **Hardware** category. In this example, you would also use subcategories of **Human Resources** and **Marketing**.

Then in Categories for Forms on the Users page, specify that users who are assigned to the Software department can only see forms in the Software category, and that users in the Hardware department can only see the forms in the Hardware category. When a Software user looks in the "By..." dropdown on their Forms page, they might see something like this:

- Software
  - Human Resources
  - Marketing

If the user selected Human Resources, they would only see the human resources forms that were specific to the Software department.

A Hardware user would see something similar:

- Hardware
  - Human Resources
  - Marketing

However, if they selected Human Resources, they would see a completely different set of human resources forms. Ditto for Marketing forms.

(Also see the help topics for the [Users](#) settings page for additional details.)

Miscellaneous

Please note that category and subcategory names are case sensitive. So **Human Resources** is a different subcategory than **Human resources** (note the lower case "r"). Also note that names must not use special characters such as an asterisk, underbar, or comma.

There may also be times that you wish to un-categorize a form. To do so, click on the **Reset** button at the bottom of the page.

Categories For Forms

These settings control which form categories to expose to which users based on their sign in email address or other user criteria. You can choose to greatly restrict what to show to specific classes of users, or, at the other extreme, to show them everything. Note that any users that you do not explicitly specify are covered by the **If no other match** settings.

Before changing these settings, you must have first assigned your forms to whatever categories you want your end users to see when they come to your BrandingUI site. You can do that by clicking on the Assets/Forms link at the top of the page.

Note that if there is a match against multiple criteria that only one of the sources and categories will be used. In other words, there is no effort to merge multiple matches. Also, the criteria are not evaluated in the order shown on the page, but instead or evaluated in the order in which they appear in a database.

Other Matches

In addition to matching up to the email address used when signing in, you can also match against other data. The table below gives you some guidelines on how to do that.

Data	Guidance
Name	Anything that makes sense
Company	Anything that makes sense
Departments	From the business structure
Approval departments	From the business structure
Phone	Anything that makes sense
Email	Anything that makes sense

Country	Two-letter country code as defined by [ISO 3166](#)
Timezone	Select a time zone from [this list](#)
Language	The language as it appears in My Account or in General Settings