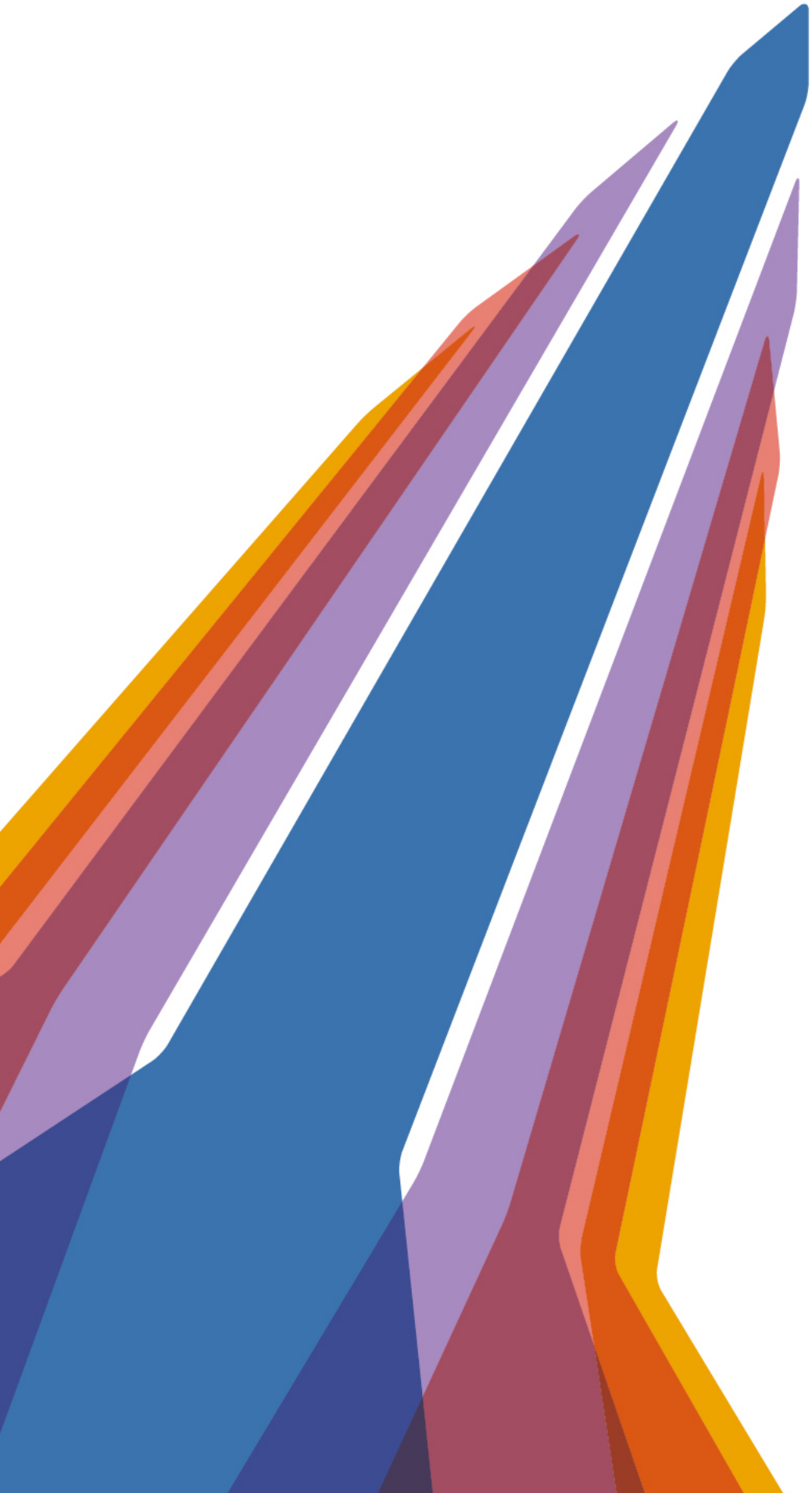
Spindle
Document Distribution

Help Guide



DRAYCIR

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1 Welcome

Spindle Document Distribution is a totally flexible software solution that enables you to instantly email, fax, print and archive all of your documents. This includes statements, invoices, remittances, delivery notes, purchase orders, quotes and many more.

Spindle Document Distribution merges information from your applications with form designs, such as your company logo and branding. This means you can create professional looking documents that can be faxed or emailed, thus reducing your printing, postage and administration costs.

Key benefits

- Dramatically reduce your costs by delivering documents via fax and email
- Save money and wastage by using plain paper instead of pre-printed stationery
- Place your company logo, branding, image and design on all outgoing documents
- Intelligent delivery means Spindle Document Distribution knows what to fax, what to email and what to print
- Digitally sign your documents so your customers are assured they are from you and have not been altered in transit
- Electronically store your documents so you can retrieve them whenever you need them
- Tried, tested and proven by thousands of users in the UK alone

Last update: 11 March 2019

2 Copyright notice

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The terms of this Licence are governed by English law and any disputes shall be subject to the exclusive jurisdiction of the English courts.

4 Requirements

The computer you are installing Spindle Document Distribution on should have the following minimum spec:

- 1 Ghz Intel-compatible processor
- 2 GB of memory
- 4 GB free disk space

Supported operating systems

- Windows Server 2008 SP2
- Windows Server 2008 R2 SP1
- Windows Server 2012
- Windows Vista
- Windows 7
- Windows 8.1
- Windows 10

Supported accounting systems

Since Spindle Document Distribution works just like a printer it can be used with virtually any application that can print. The following accounting systems have been tested and approved to work with Spindle Document Distribution. Other accounting systems may work but have not been tested by Draycir:

- Sage Line 50 V6 through to 2007
- Sage 50 2008 through to 2016
- Sage Line 100 V5 to V8 (DOS and Windows)
- Sage MMS
- Sage 200 through to 2016 (On-premise and Online)
- Sage 200c
- Sage X3
- Sage ACCPAC
- Sage 300 ERP
- Sage CRM 2018 R1
- Sage Office Line Evolution 2011
- Pegasus Opera II
- Microsoft Dynamics NAV (formerly Microsoft Navision)
- Microsoft Dynamics GP (formerly Microsoft Great Plains)
- SAP Business One
- Access Accounts

Other tested applications

This is a list of applications that have been tested and approved to work with Spindle Document Distribution. Other applications may work but have not been tested by Draycir:

- Microsoft Office (Word, Excel) 2000, XP, 2003, 2007, 2010, 2013, 2016
- Sage Payroll V8 to V11
- Sage Job Costing V8
- Crystal Reports V9 to V11
- ACT! V6
- ACT! 2007 through to 2013

The latest supported versions of the products can be found on our website.

Draycir has a policy of constant development and improvement. We reserve the right to alter, modify, correct and upgrade our software products and publications without notice and without incurring liability.

5 Overview

5.1 What is Spindle Document Distribution

Spindle Document Distribution is an advanced Windows printer driver that intelligently distributes your documents via email, fax, and print and electronically archives them.

Spindle Document Distribution enables you to associate sets of rules to your documents. This ensures your documents always reach the right people at the right time and in the most cost effective manner.

You can make these rules as simple or as complex as you want. For example every time you print an invoice you may require 3 copies from your laser printer, with your company logo printed on the top copy. Or a more complex rule is where your invoice is emailed to your customer, a copy is emailed to the relevant sales person, a copy is printed to the warehouse so the goods are picked and a final copy is electronically archived so it can be found instantly and used by multiple people at the same time.

Spindle Document Distribution can take a large batch of documents, such as a statement run and divide it into the individual statements, working out account by account how each of the statements should be delivered, what logos, colours, lines and even highlights (showing overdue moneys) as used. This is all done without asking you any questions!



5.2 Where can Spindle Document Distribution be used

Spindle Document Distribution is versatile and equally suitable for use across a range of business applications. Sales & Marketing, Human Resources, Customer Services and Accounting departments, where applications can all benefit from a more streamlined and automated approach to document handling. It can be used anywhere that you have a document or batch of documents or reports that you need to delivered to other people.

Accounting

Statements, Sales Orders, Purchase Orders, Invoices, Remittances, Picking Lists, Delivery Notes, Works Orders etc.

Sales & Marketing

Estimates, Quotations, Enquiries, Letters, General Communications etc.

Human Resources

Wage slips, Employee information etc.

Customer Services

Work Sheets, Service Logs, Engineer reports, Return Authorisations etc.

5.3 How does Spindle Document Distribution work

Spindle Document Distribution is a virtual printer and works like a regular Windows printer except that there is no physical output device. Instead, Spindle Document Distribution captures the pages electronically and applies the rules that you have defined for your documents. The rules tell Spindle Document Distribution whether the document should be emailed, faxed, printed, archived and/or linked into your CRM system. The rules also determine which forms (stationery) are added to the document and if extra pages of information such as terms and conditions should be sent as well.

When Spindle Document Distribution is installed on your computer, up to three virtual printers are added to your printers list. These virtual printers are:

Spindle Pro

This printer is used to distribute documents. When using this printer a dialog box will appear and ask you how you want process your document. You can select a document type or send it to another printer, email or fax the document whilst merging in a form backdrop simultaneously.

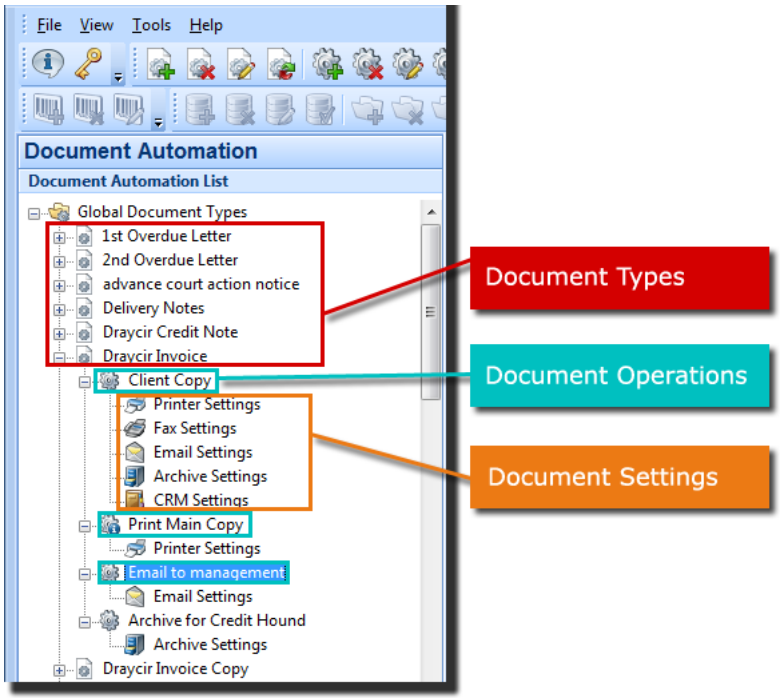
Spindle Pro Auto

This works just like the Spindle Pro printer except the Auto printer can distribute a document without any user intervention when used with Document Automation.

Spindle Pro Form Creator

The form printer is used to create backdrop forms (stationery). These forms can be created from virtually any Windows application that can print. A selection of Microsoft Word documents are included with Spindle Document Distribution. You can edit these documents to contain your own address details and company logos.

5.4 Rules and document automation



Spindle Document Distribution can associate a set of rules to your documents. These rules can be broken down into three parts:

1. Document Types
2. Document Operations
3. Document Settings

Document Types

A Document Type is the name given to a particular kind of document and holds one or more Document Operations. Document Types normally describe the document it is associated with, for example Invoice, Sales Order, Chasing Letter, Delivery Note, Quote etc. There is no limit to the number of Document Types you can create.

The Document Type name is used to associate a document that has been printed to Spindle Document Distribution to the distribution rule. For example, when you print a document which contains the command ##CFG Invoices##, Spindle Document Distribution will search the list of Document Types for the one called Invoices. If the Document Type is found, Spindle Document Distribution uses the Document Operations it contains and applies them to the printed document.

Document Operations

A Document Operation holds a set of instructions to enable it to perform a task on that document, e.g. if it should be emailed or archived, which forms should be used etc. A Document Type can have a number of Document Operations.

To perform more than one task on a document you would create multiple document operations with each operation performing a specific task. For example, the first operation could email a customer a sales order while a second operation could print a copy of the sales order in the warehouse ready to be picked up and processed by the warehouse staff.

Document Settings

Each Document Operation has a number of ways it can distribute a document

- Print

- Fax
- Email
- Archive
- CRM

Each of these methods of distribution have specific settings within the Document Operation. For example, in the Printer Settings you can select the destination printer you want your document printed to, which paper tray to use, whether duplex mode should be enabled as well as what forms should also be printed.

You can find more information on Document Operation settings in the section Configuring Spindle Document Distribution.

5.5 Examples of what Spindle Document Distribution can do

Multiple Operations

Many times the information contained in a document needs to be given to more than one person or processed in a number of ways. With Spindle Document Distribution you can easily setup complex distribution and delivery methods for your documents. For example, you may have a sales order that needs to go to your customer, the sales person for the account, the warehouse (for processing) and to the management if the order value is over £5,000. Each of these tasks is a separate operation. Multiple operations can be used to automatically print the same document to different paper trays on the same printer or even to different printers located throughout the company.

Terms and Conditions forms (Additional forms/messages)

Spindle Document Distribution can add extra pages of information to your documents. These could be your terms and conditions of business, product literature, directions to your offices (for an event or deliveries), details of your current special offers or even openings times of Christmas, bank or other holidays. Basically anything you need to tell your customers, prospects, suppliers or staff. Many companies send out marketing information about offers and other important events but miss the opportunity of ensuring as many people as possible are aware. Using Spindle Document Distribution you can increase the awareness by adding the information to all outgoing correspondence.

Digital PDF Signing

Digital signatures ensure that your customers can trust documents such as invoices received digitally, an essential requirement in replacing reliance on inefficient paper based processes.

Bar Coding

Barcodes allow users to store information in a series of black and white lines and are used by businesses to improve the speed and accuracy of data entry. Barcodes have a wide range of applications across a business and are predominately used in stock control, warehousing and manufacturing processes. Spindle Document Distribution can create a variety of barcode types without the need for any specialised fonts or barcode printers!

Printer Routing

You can lose a lot of time by having to hand deliver documents to different people in different locations of the business. With Spindle Document Distributions powerful printing abilities you can print your document to the printer that is closest to the person who needs it. Spindle Document Distribution can automatically print the right number of copies of your document, even from different paper trays so you can use different coloured paper or different forms (stationery) per copy.

External Data

Spindle Document Distribution has the ability of delivering your documents intelligently, dynamically altering their look and feel by using information found on the document itself. However sometimes the information you need is not in the application

that printed the original document. The External Data feature makes it possible for you to gather information from other applications. This means even if your application doesn't contain contact names and email addresses you can use the External Data feature to get the details from another database. External Data can also be used to overwrite information gathered from the original document, enabling you to distribute the document in a number of different ways.

Page Sorting

When printing a batch of documents Spindle Document Distribution can re-arrange the order in which these pages are processed. For example if you are printing a batch of invoices where some of your accounts may have a number of invoices, Page Sorting can sort the pages by the account number ensuring all of the invoices for each account are next to each other when printed. This way you can easily pack all of the invoices into one envelope without the need for hand sorting the printed pages.

PDF Password Protection

PDF files can be password protected so that only those who know the required password can open and view the PDF. This may be used during a pay run whereby employee payslips are generated with a unique password for each employee and subsequently emailed to them.

PDF/A-1b standard

The PDF/A-1b standard is a level of PDF/A compliance, which is a standard adhered to for the long-term preservation of digital documents. It differs from a normal PDF in that a normal PDF does not conform to long-term storage requirements. On the other hand, the properties of a PDF/A-1b file mean that the PDF can still be read after a period of time. The PDF/A-1b standard can be set on PDF files that are emailed out or archived.

6 Getting Started

This section of the manual will take you through the following:

- Installing Spindle Document Distribution
- Understanding the User Setup Wizard
- Updating data from a previous version of Spindle Document Distribution
- Entering your licence key
- Setting up your Spindle Document Distribution users
- A quick tutorial on using Spindle Document Distribution

6.1 Database Update Wizard

If you have upgraded from a previous version of Spindle Document Distribution, at the end of the server installation or the first time you run the Tools / try to print a document to one of the Spindle Document Distribution printers, the database update wizard will appear. This wizard will update your current rules and settings to be compatible with the new version of Spindle Document Distribution.

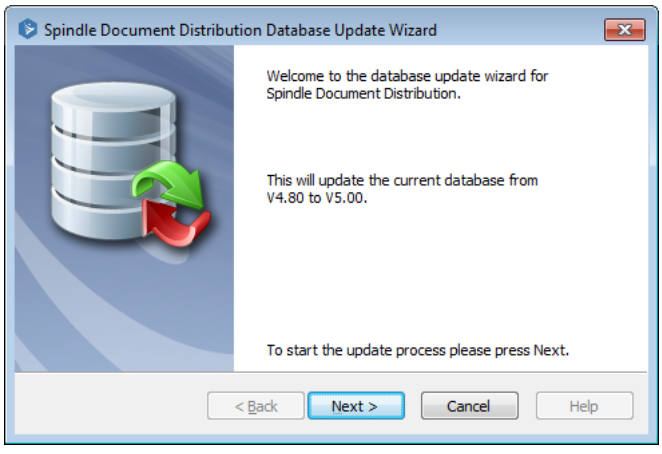
Important!

Even though the database update wizard will backup your database, we strongly advise that you make your own backup too. If you attempt to access this updated database with a previous version of Spindle Document Distribution you may corrupt your data so please ensure you update all workstations with the new version of the software!

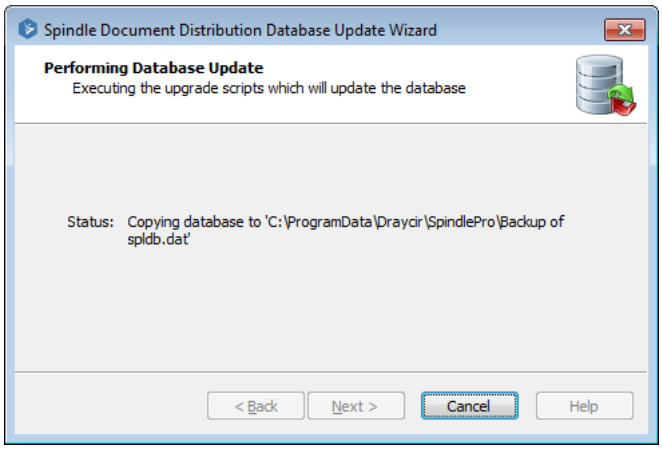
Wizard instructions

1. The wizard will automatically run when you enter the Spindle Document Distribution Tools and the database needs updating.

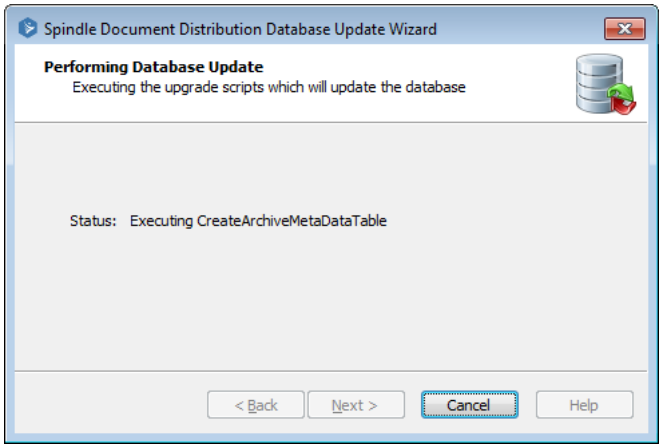
Note: The current database version on the screenshot (below) may be different based on which release is being installed.



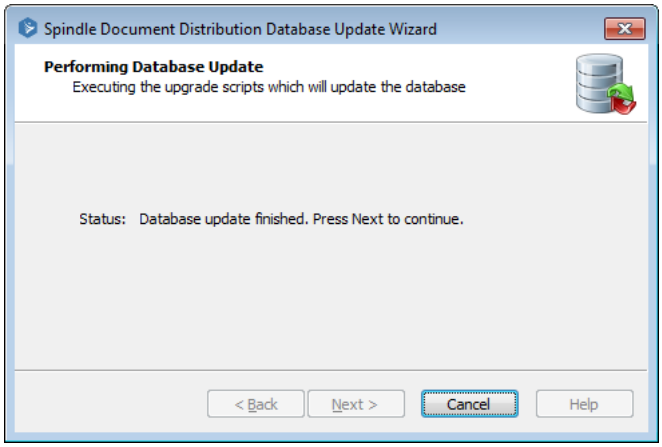
2. The first screen that appears is the Welcome dialog. If the database does not need updating the dialog will say so and you will not be able to continue. If the database does need updating click **Next** to start the process.



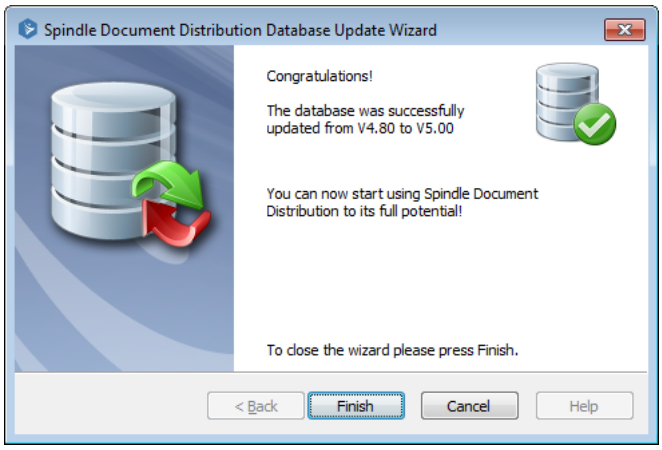
3. The wizard will backup the current database before performing an update. However, it is strongly advised that you make your own backup before performing this update.



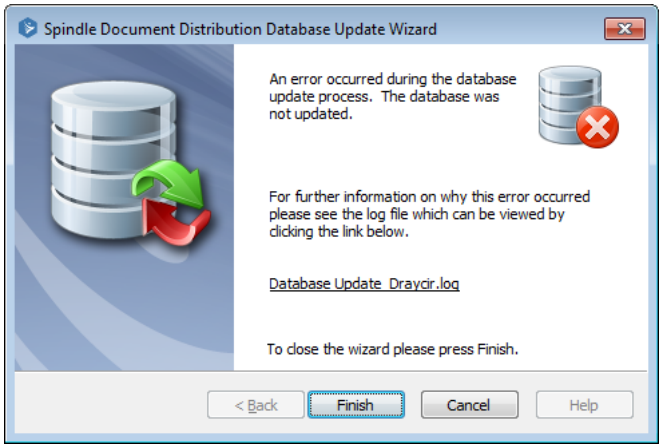
4. Once the backup has completed the wizard will start executing the update scripts. The current status will be displayed and updated as the process continues.



6. The update process continues until the database has been fully updated. Click **Next** to continue.



7. If the update was successful the following screen will be displayed. Click **Finish**.



8. If the update was unsuccessful you will see the above screen. You can find further information by examining the log file. Your Draycir Partner may require you to email them this log file to help resolve your issue. Click **Finish** to end the wizard.

Your database should now be updated and ready for use! Again, please ensure that you upgrade all your computers to the same version of Spindle Document Distribution before making any changes to your rules and settings.

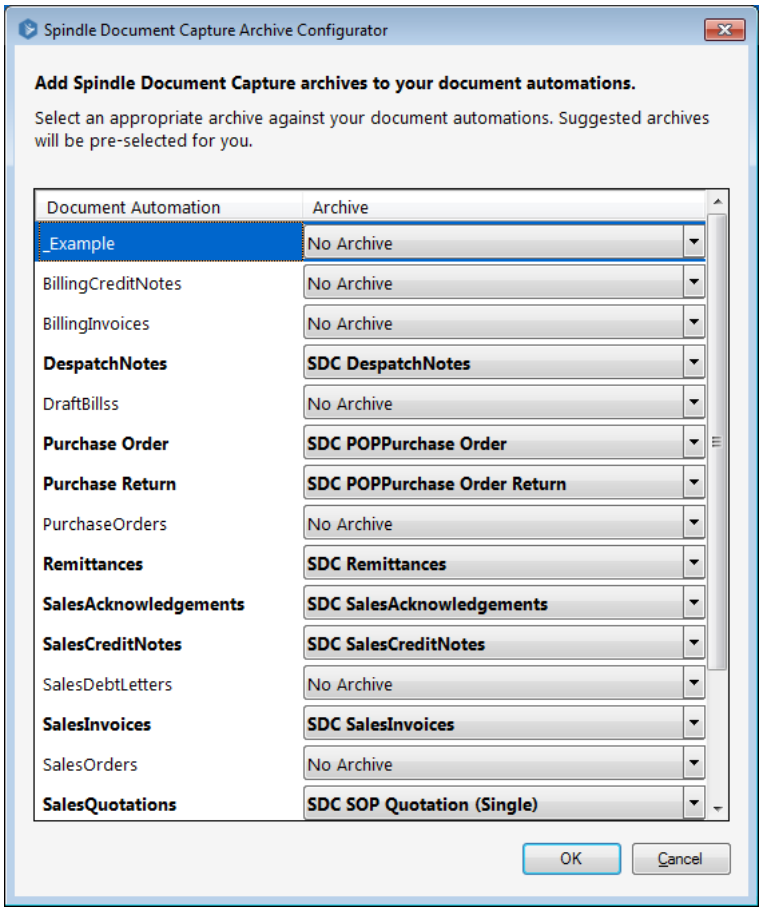
6.2 Linking SDC Archives to Document Automations

A user with a Distribute Licence Type will be able to archive their outbound documents into Spindle Document Capture, and view these documents back using the Document Search tool.

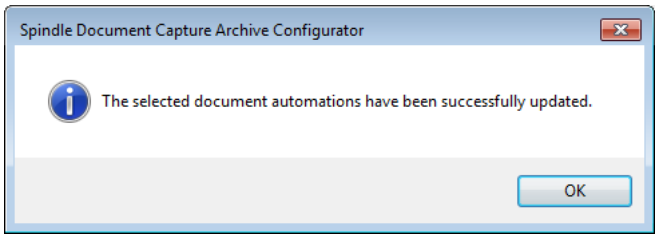
If you are performing a fresh install and your primary application is Sage 200, a set of pre-configured Spindle Document Capture archives are created for you. These archives are linked to the relevant Document Automations under a new Operation. This allows those documents to be archived into Spindle Document Capture when printed.

If you are upgrading from a previous version of Spindle Document Distribution and your primary application is Sage 200, at the end of the server installation the SDC Archive Configurator will appear. This tool will allow you to link SDC Archives against your existing Document Automations.

The recommended archives will be pre-selected for you.



Once you have selected the SDC Archives you would like to add against the Document Automations, you can click OK to proceed. You will see the following confirmation following a successful update:



6.3 Adding custom Sage 200 layouts with archive commands

A user with a Distribute Licence Type will be able to archive their outbound documents into Spindle Document Capture, and view these documents back using the Document Search tool.

If your host application is Sage 200 (version 2010 upwards), you will also be able to view these documents back from within Sage 200 (See Getting Started > Adding Spindle Document Management buttons into Sage 200).

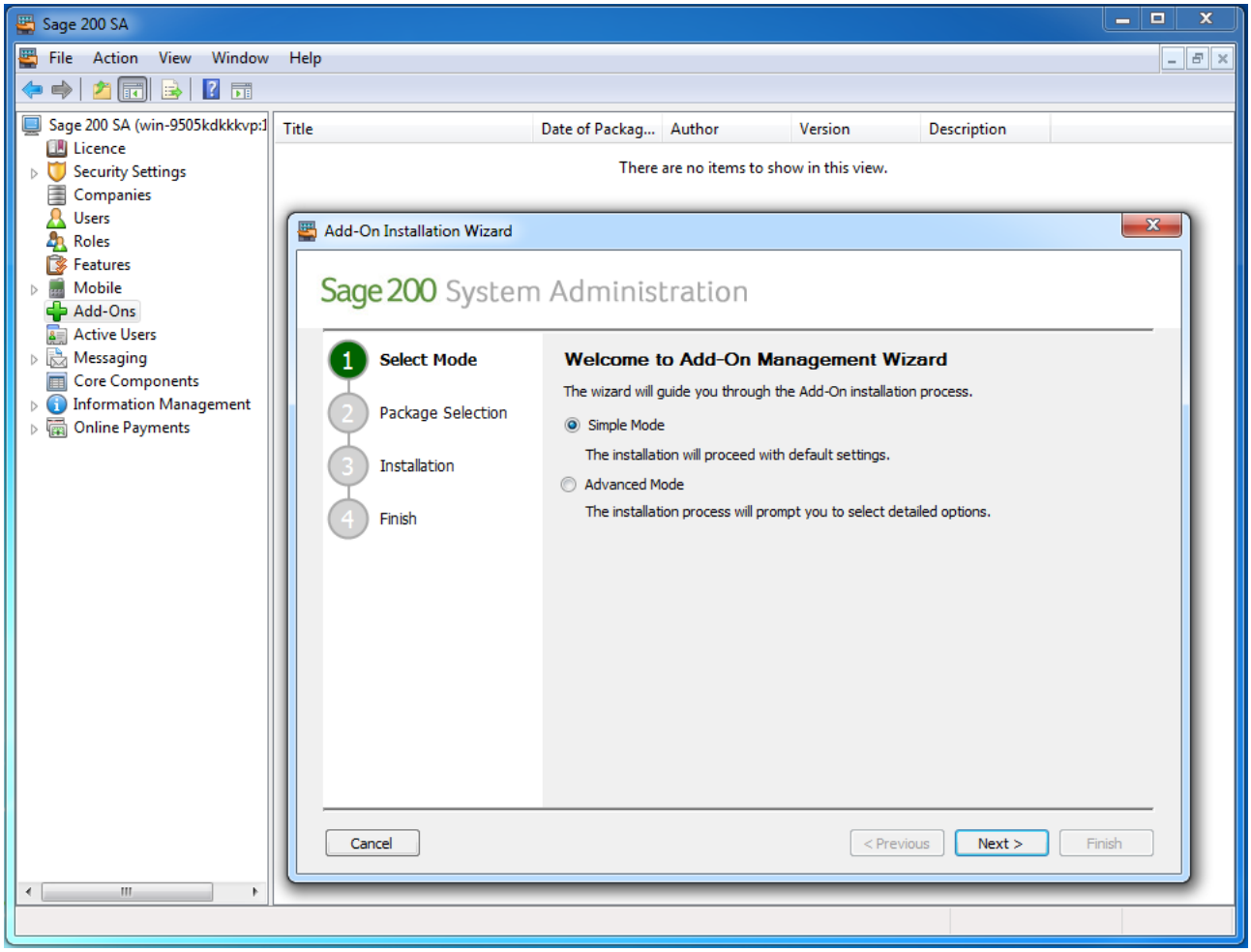
To archive documents, you will need to add some additional commands onto the corresponding Sage 200 layouts. These commands will extract some describing data relating to the document.

An add-on package has been provided that will deploy Sage 200 layouts within the custom layouts folder. These layouts have been pre-configured with Spindle Document Capture commands.

Note: We strongly recommend that you back up all of your existing layout files within the Sage custom layouts folder prior to deploying the add-on package.

Steps to add the Add-On package:

1. Log into the Sage 200 System Administration tool
2. On the left hand navigation bar, right-click on **Add-Ons**
3. Select **Add New Add-On**
4. Select Simple Mode and click **Next**



5. **Browse** for the Spindle Custom Layouts.sdbx package in:

C:\Program Files (x86)\Draycir\Spindle Document Distribution\Add-Ons\Sage 200 - *then select the version of Sage 200 that*

you have

6. Click **Open**
7. Click **Install**
8. Click **Finish** to complete the wizard

Once the add-on has been deployed, the following layouts will be added to the Sage 200 (custom) layouts folder:

- POP Purchase Order (Single)
- Purchase Ledger Remittance Advice (Single)
- Sales Ledger Statement with Advice (Single) *
- SOP Credit Note (Single)
- SOP Despatch Note (Single)
- SOP Invoice (Single) *
- SOP Order Acknowledgement (Single)
- SOP Pro Forma (Single) *
- SOP Quotation (Single)

For Sage 200 200 2010 and 2011, when the Add-On package is installed, the file is deployed to 'C:\Sage\Layouts'.

For Sage 200 200 2013, 2015 and 2016, when the Add-On package is installed, the file is deployed to 'C:\Sage\reporting\custom\layouts'.

Once deployed, you can either use these layouts, or you can copy the Spindle or Spindle_SDC expression box(es) onto your existing layout.

* These layouts contain joins for PayThem. If copying the expression, this will mean that certain data fields will not be available on your original layouts. You will need to omit the data fields that are related to PayThem or add the joins onto your original layout. (See Add a Pay Now button onto outbound documents (see page 219) for more information.)

Note: If you are using Sage 200 2016 onwards, only 3 layouts will be deployed (SOP Credit Note, SOP Pro Forma and SOP Quotation). The archiving commands on the other layouts are shipped on the Sage 200 2016 layouts by default.

6.4 Adding DatasetID on Sage 200 layouts for archiving

When archiving outbound documents into Sage 200, one piece of data is key is the DatasetID. This is so that we can ensure that your documents are archived against the correct company within Sage 200. If you only have one company, you can hard-code the value within archive manager > Spindle Document Capture archive > Configuration tab > Company ID field. Alternatively you can use a ##DATASETID variable to retrieve this data from your report layout.

Mapping ##DATASETID## / Company ID on layout

If using Sage 200 2013, 2015 or 2016

The following command is already populated on the supplied custom layouts:

“##DATASETID " + SYSCompanies.CompanyNumber + "##"

(For more information regarding deploying these custom layouts, see Getting Started > Adding custom Sage 200 layouts with archive commands (see page 16))

If using Sage 200 2010 or 2011

SYSCompanies.CompanyNumber was not exposed.

A suggested solution would be to use the DateTimeCreated field on the SYSCompanies table, and map the DATASETID against this value.

In SQL Server Management Studio:

- Open the Company database
- On the SYSCompany table, make a note of the DateTimeCreated value
- Convert the dates to the format yyyyMMddHHmmss. e.g. ‘15/06/2009 15:18:52’ becomes ‘20090615151852’.
- Once you have all of your dates in that format, you assign each of those to the appropriate DATASETID. The DATASETID can be retrieved from Sage200Configuration.tblCompany – CompanyID field.

Example expression to be added to your Sage 200 2010 or 2011 layouts (where '6' and '5' are examples of Company ID's):

"##DATASETID " + (DateTimeToFormattedString(SYSCompanies.DateTimeCreated, "yyyyMMddHHmmss") = "20090615151852" ? 6: DateTimeToFormattedString(SYSCompanies.DateTimeCreated, "yyyyMMddHHmmss") = "20100615151852" ? 5: DateTimeToFormattedString(SYSCompanies.DateTimeCreated, "yyyyMMddHHmmss")) + "##"

Even if you are using the custom layouts supplied with Spindle Document Management, you will need to add the DATASETID expression onto these layouts using the expression above. Alternatively if you only have a single company you can hard code the Company ID on the specific archives within Archive Manager.

Note: If a new company is created in Sage 200, this expression will need to be amended on every layout it has been used on.

6.5 Installing the software

The software is licensed per computer and must be installed on each computer that wants to distribute documents. For example, if you have purchased a 5 user user licence then you may install the software on up to 5 computers. If installing on a terminal server then the software may be used by up to 5 named users. You cannot 'share' any of the Spindle Document Distribution printers. For more information on licensing please contact your Draycir Partner.

Upgrading notes

If you are upgrading a previous version of Spindle Document Distribution please backup your data before hand. You will need to upgrade all the computers that have the older version of the software installed. Spindle Document Distribution will update the database containing your rules and other settings. If you attempt to access this updated database with a previous version of Spindle Document Distribution you may corrupt your data!

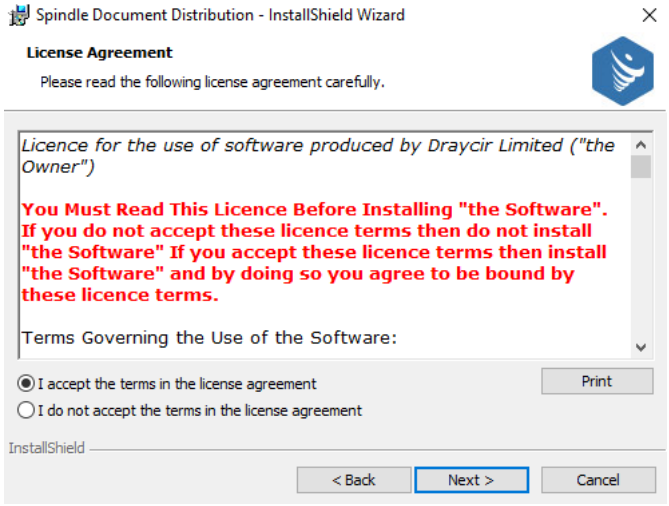
Installation notes

1. The installation should be performed by your Draycir Partner or by an IT competent member of staff.
2. Ensure you have all communication software (email and fax solutions, printers, CRM system) already installed.

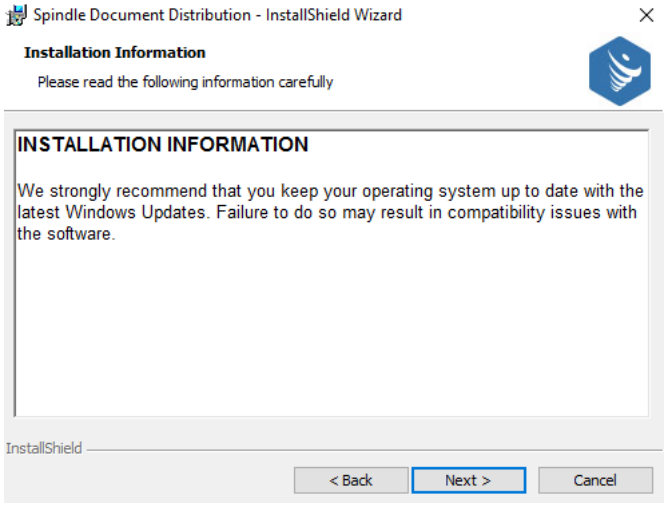
3. Log onto the workstation with 'Administrator' level access.
4. Reboot the workstation if asked. This step is very important!
5. If installing on a terminal server use the 'Add/Remove Programs' option in the Control Panel.

Installation instructions

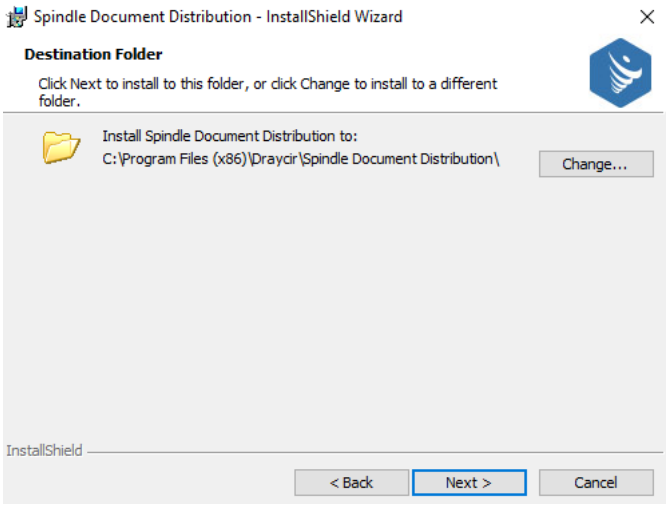
1. Insert the CD into your CD-ROM or DVD drive. The menu program should load automatically.
2. Select **'Install Spindle Document Distribution'** from the menu.
3. When the welcome screen appears, click **Next.**



4. After reading and accepting the license agreement, Click **Next**

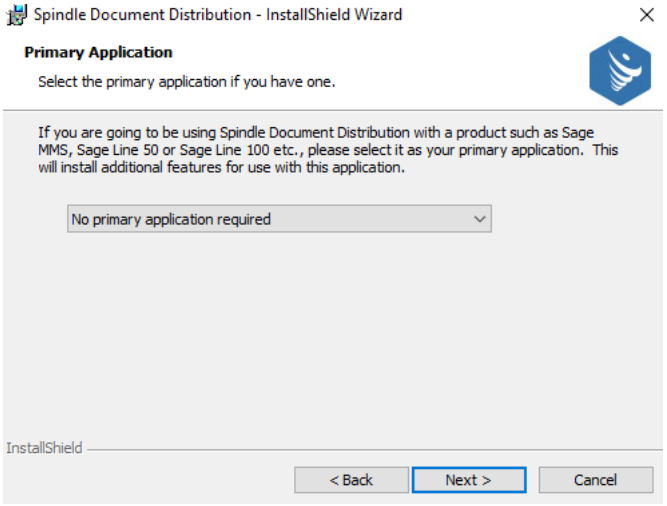


5. After reading and accepting the windows operating system updates, click **Next**.

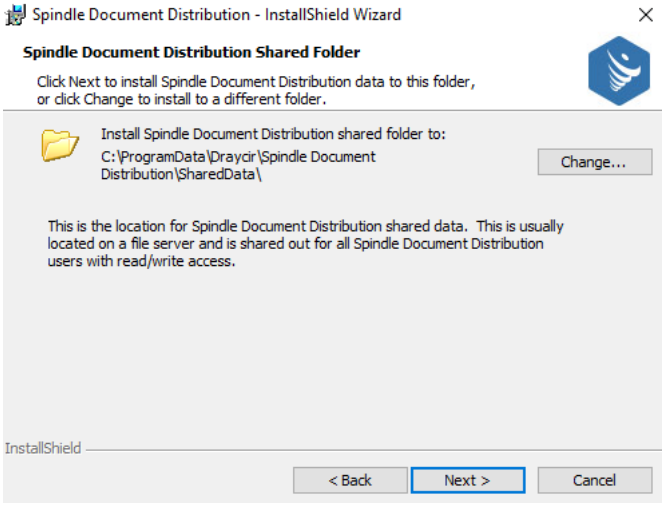


You are prompted for the installation location for the software. The wizard has already selected the recommended installation location. Click the **Change** button if you want to install the software to a different location. Click **Next** to continue.

6. After setting the location of the software , click **Next**

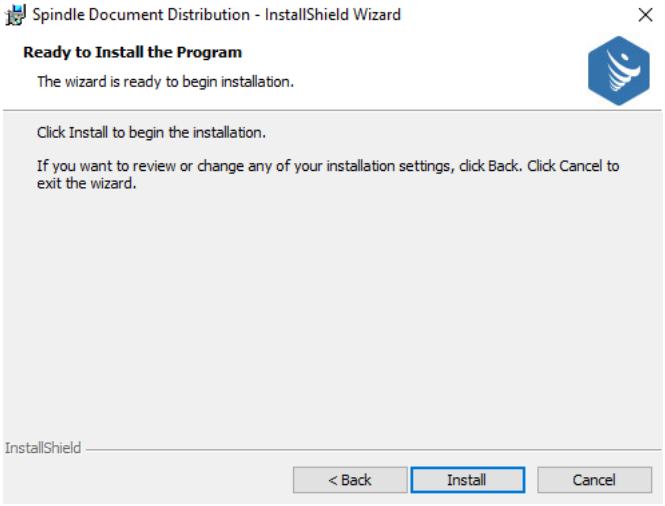


7. After selecting the Primary Location, click **Next**



Select the folder where the shared data will be located, this usually defaults to the common data area on your local computer. If you are installing the software on more than 1 computer you will need to change this to a location where all users will be able to access the data, usually on a file server.

8. Click **Next** to continue.



You are now ready to start the installation. Click **Install**.

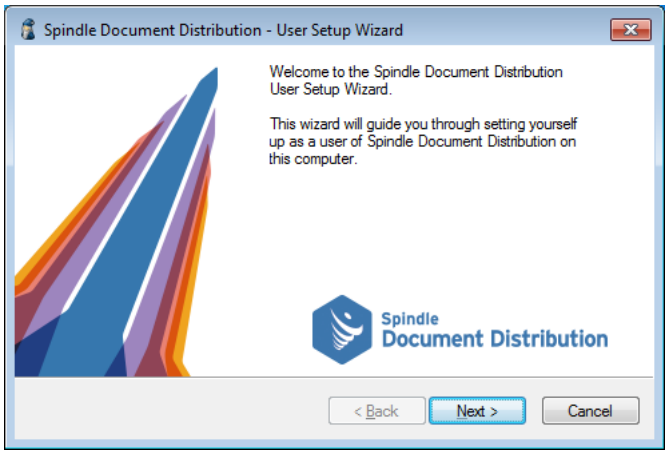
When the installation is complete the User Setup Wizard will appear. Please see the next section for further information.

6.6 User Setup Wizard

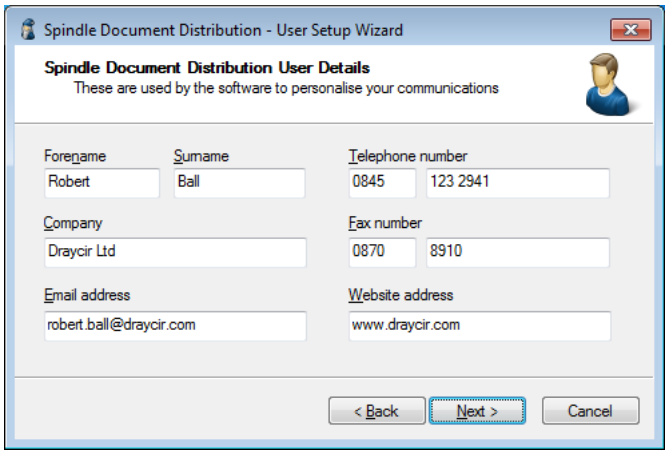
The user setup wizard appears at the end of the client installation, when a new user first logs on to a workstation with Spindle Document Distribution installed, or can be launched directly from the Spindle Document Distribution Tools under User Settings -> Options.

Wizard instructions

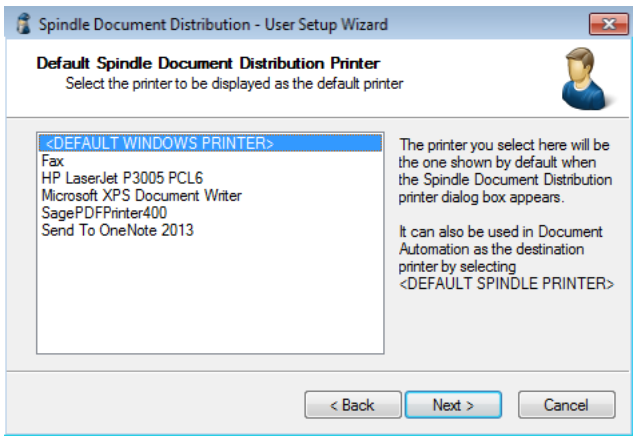
The user setup wizard guides you through the process of setting up Spindle Document Distribution for the current user on your computer.



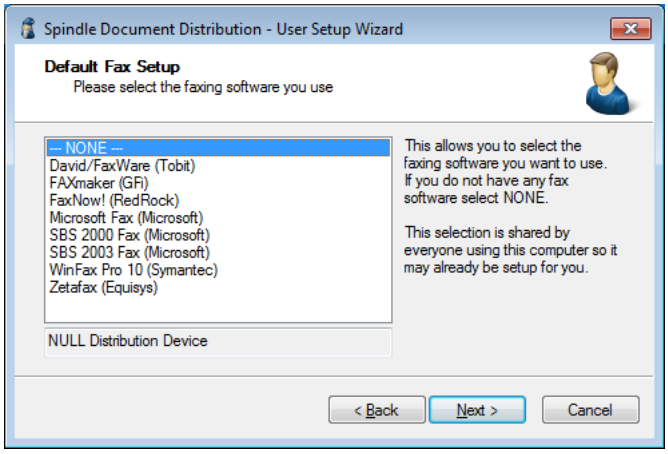
1. The first screen that appears is the Welcome dialog. Click **Next** to continue.



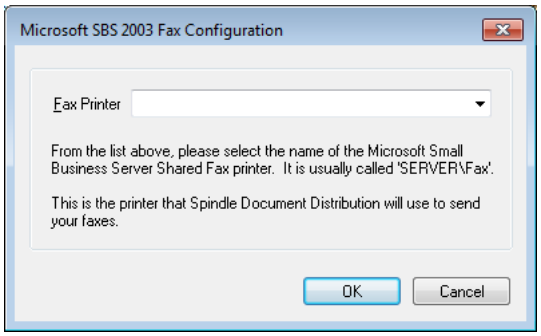
2. Fill in the details of the current user. It is very important that this section is completed as these details are used by various features of Spindle Document Distribution to log on to 3rd party applications, personalise documents and email messages and also for the routing of documents. Forename, Company and Email address are mandatory fields. Click **Next** to continue.



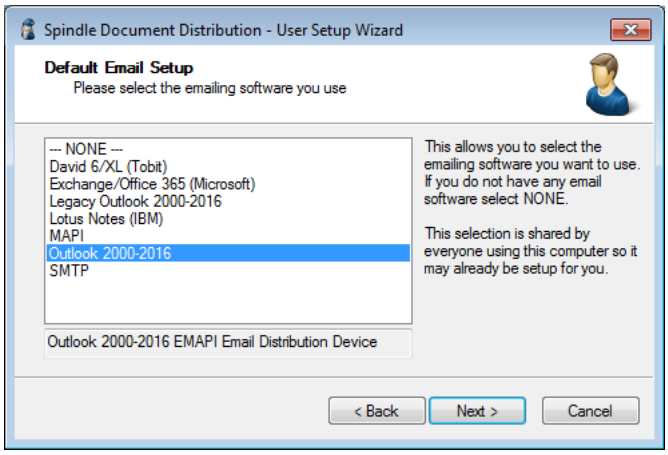
3. This section defines the current users <SPINDLE DOCUMENT DISTRIBUTION DEFAULT PRINTER>. The %SPINDLE DOCUMENT DISTRIBUTION% default printer is one of the ways of routing documents to a physical printer and can be selected on the Printer Settings in a Document Operation. Click **Next** to continue.



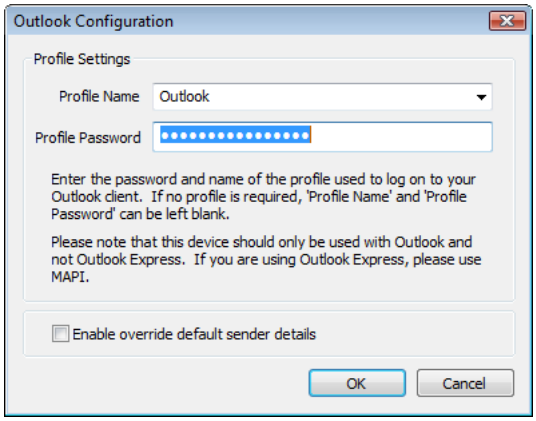
4. Select the default fax device that you want Spindle Document Distribution to use when faxing documents. You may need a 3rd party application to be installed before you can use this feature. If you do not require faxing select **NONE**, however any Document Operation that uses faxing will cause Spindle Document Distribution to discard the document without warning or alerting the user. You MUST ensure that all users can fax or do not select fax as a distribution method on your documents. Click **Next** to continue.



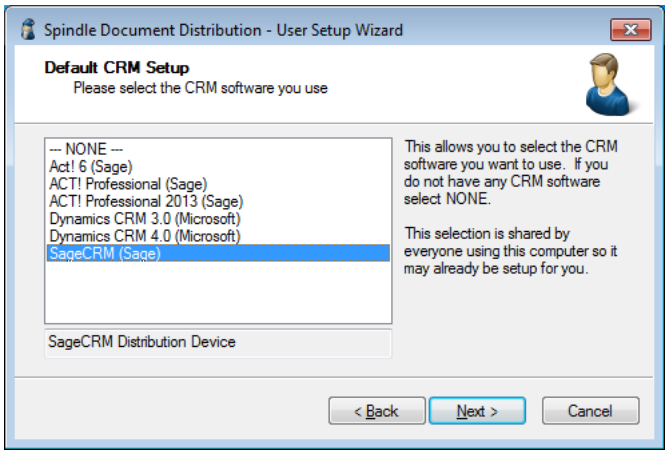
5. Depending on the fax device you selected you will be asked to complete the setup of that device and will vary depending on the fax device you have selected. Follow the on screen instructions given to you. Above is an example of the setup screen if you had selected the Microsoft SBS 2003 fax device.



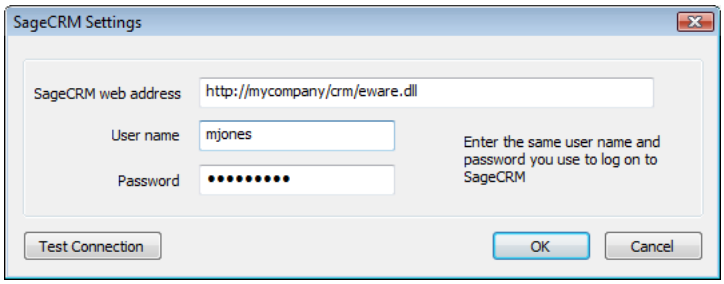
6. Select the default email device that you want Spindle Document Distribution to use when emailing documents. You may need a 3rd party application to be installed before you can use this feature. If you do not require emailing select **NONE**, however any Document Operation that uses emailing will cause Spindle Document Distribution to discard the document without warning or alerting the user. Click **Next** to continue.



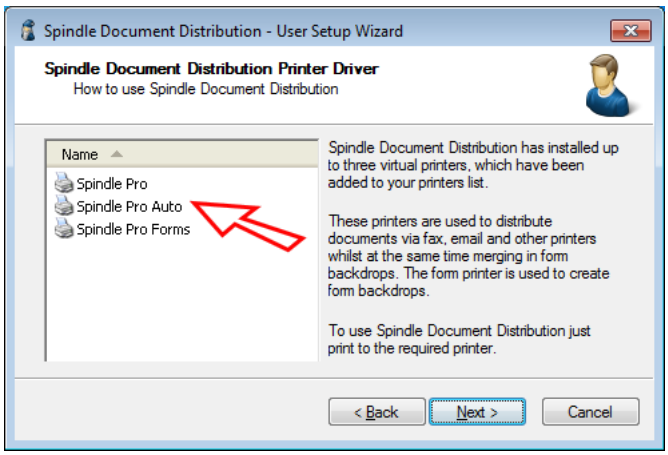
7. Depending on the email device you selected you will be asked to complete the setup of that device. Follow the on screen instructions given to you. Above is an example of the setup screen if you had selected the Outlook 2000 - 2007 email device.



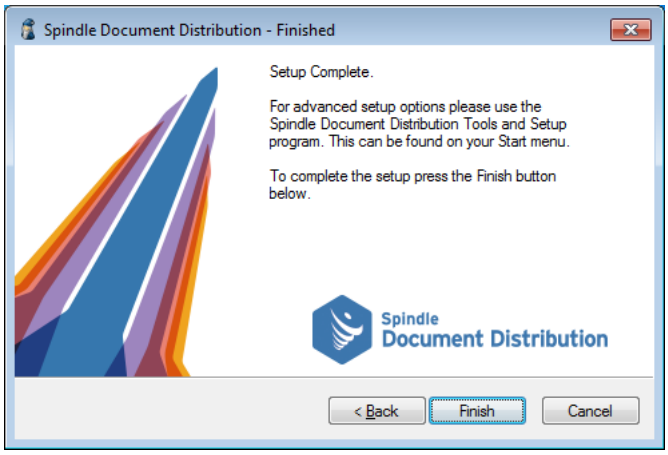
8. Select the default CRM device that you want Spindle Document Distribution to use when writing notes and linking documents to company's and contacts in your CRM (Customer Relationship Management) system. You may need a 3rd party application to be installed before you can use this feature. If you do not require CRM select **NONE**, however any Document Operation that uses CRM will cause Spindle Document Distribution to discard the document without warning or alerting the user. Click **Next** to continue.



9. Depending on the CRM device you selected you will be asked to complete the setup of that device. Follow the on screen instructions given to you. Above is an example of the setup screen if you had selected the SageCRM device.



10. The next screen tells you about the three printer drivers that have been installed on your computer. Click **Next** to continue.



11. The wizard has completed setting up the current user. Click **Finish** to close the wizard.

If you cancel the wizard at any point it will ask you if want to run it again next time you log it. Remember you can run the wizard or alter any of these settings using the Spindle Document Distribution Tools. Please refer to the User Settings (see page 189) section of this help file for more information.

6.7 Automating documents

Document Automation is achieved by placing Spindle Document Distribution commands in your documents. When the document is printed to the Spindle Document Distribution printer these commands are removed from the document and used to determine how the document should be processed.

Before you start to automate your document you need to ask yourself a number of questions, which include:

- How do you want to deliver the document (email, fax, printer)
- Does the document need to be split up?
- What form (stationery) do you want to use?
- Do you want to archive the document?
- Should you write information to the CRM system?

Once you've defined what you want to do with your document you can start the automation configuration process. In this exercise we will do this in the following steps:

1. Add ## commands to our document.
2. Design and create our form containing our company branding.
3. Create our distribution rules using a Document Type and Document Operations.

Lets take each of these in turn.

On the Spindle Document Distribution USB drive is a folder called **Tutorials**. This folder contains a Microsoft Word document **(Sample Sales Order.doc)** and Microsoft Excel spreadsheet **(Sales Accounts.xls)** that use Word's Mail Merge feature to produce a number of sample sales order documents. There are also two form template Word documents called **Sales Order Stationery Black.doc** and **Sales Order Stationery Colour.doc**. Copy these files from the USB drive into your **My Documents** folder.

Open the Word document **Sample Sales Order.doc** and point the mail merge data to the same location where you copied the tutorial files to.

Follow the steps explained in the next articles.

6.7.1 Using commands

Embedding Commands

Embedded commands are used to transmit data from your document to Spindle Document Distribution. These commands can be used to tell Spindle Document Distribution all sorts of information about your document, including:

- What type of document it is (invoice, statement, letter etc.)
- The recipients details such as their name, email address and fax number.
- Specific document information like the account number on an invoice, or the outstanding amount on a statement.

Commands can be embedded or placed into your documents and reports or retrieved by using **External Data**. For a single recipient document or report, only 1 embedded command is required:

1. A CFG command

For a multi-recipient document or report such as a statement run, a minimum of two commands are required in your document or report:

1. A CFG command
2. A split variable command

The ##CFG## Command

Document Types are created in Spindle Document Distribution Tools and are linked to a document by the embedded **CFG** command. To establish a link to a document type you have previously created called **'Sales Order'**, you would place the following text within your invoice document/report:

```
##CFG Sales Order##
```

When this document is printed to the Spindle Document Distribution printer, the CFG command is extracted and Spindle Document Distribution searches for the document type called 'Sales Order'. If found, all of the document operations stored under the 'Sales Order' document type are performed on the document.

The Split Variable

One the biggest advantages of Spindle Document Distribution is its ability to receive a multi-page document and intelligently divide the pages into individual documents, e.g. a batch of statements. If you require the documents to go to different people then you have to define the **Split Variable**. This is a unique value on the document page that changes each time that particular part of the document needs to go to a different recipient.

For instance when performing a statement run you would probably choose the account number as the Split Variable as this value will be different for each customer in the document. If you were to run a batch of sales orders then you would probably choose the sales order number.

The Split Variable should be unique and guaranteed to be on the first page of every new document you print to Spindle Document Distribution.

Command Structure

The command has the format of:

- A pair of hashes, i.e. ##
- The command itself followed by a space, e.g. CFG
- If applicable to the command, a value to associate with it, e.g. Invoice
- Finally, another pair of hashes encloses the end of the command, i.e. ##

So the final command is `##CFG Sales Order##`.

Common Commands

A full list of commands can be found in Command Reference. However, the most commonly used commands used are:

Command	Explanation
CFG	The name of the Document Type in Spindle Document Distribution Tools
COMPANY	The customer’s or supplier’s company name
NAME	The name of the person the document is going to (the recipient)
EMAIL	The recipient's email address
FAX	The recipient's fax number
VAR1 to VAR50	Extra information about the document such as the account number, invoice number, order number etc.

In our Sample Sales Order document we have used

Command	Explanation
CFG	Sales Order
COMPANY	The customer’s company name
NAME	The name of the customer the document is going to
EMAIL	The customer's email address
FAX	The customer's fax number
VAR1	The Account Reference of the customer
VAR2	Order Number
VAR3	Order Date

The next section explains how you can add these commands to various applications.

6.7.2 Editing your reports

You can use Spindle Document Distribution with virtually any application that can print. Understanding your applications document editor or report designer is essential to automating your documents and reports. Spindle Document Distribution uses commands to gather data. Every command you want to use in your rules needs to be either entered in your document or gathered from a database using External Data. If you do not specify a command you cannot use it in your rule (Document Type).

Getting Data from Fields

Most application report designers allow you to add fields to reports. When a report is printed these fields are replaced with actual data supplied from the application. For example, if you wanted to add an invoice number to a report you could add a field called INVOICENUMBER (depending on the application and report designer). When the report is printed, the application replaces INVOICENUMBER with the actual invoice number for that page of the report. The Spindle Document Distribution embedded commands use this functionality to extract data from the document or report.

So how do we make the INVOICENUMBER field accessible to Spindle Document Distribution? We need to enclose the field around a command. E.g.

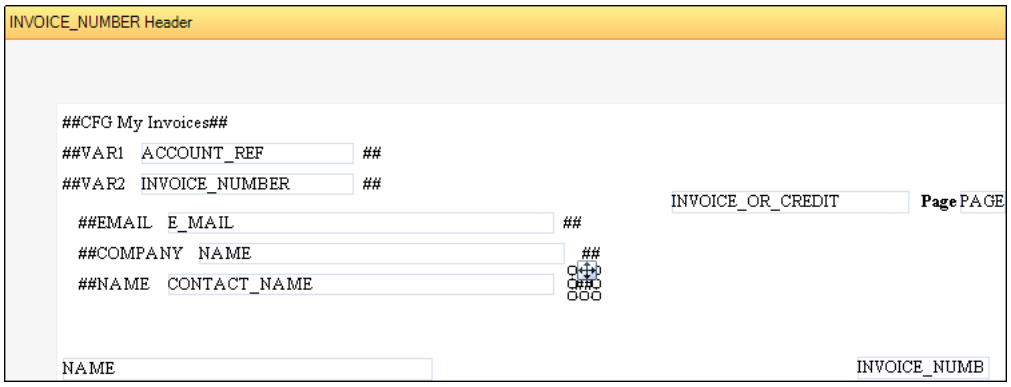
```
##VAR1 INVOICENUMBER##
```

When the application prints the report the field INVOICENUMBER will be replaced with the actual invoice number. E.g.

```
##VAR1 4572##
```

Spindle Document Distribution will extract the value 4572 from the ##VAR1 command and be able to use it in within its rules.

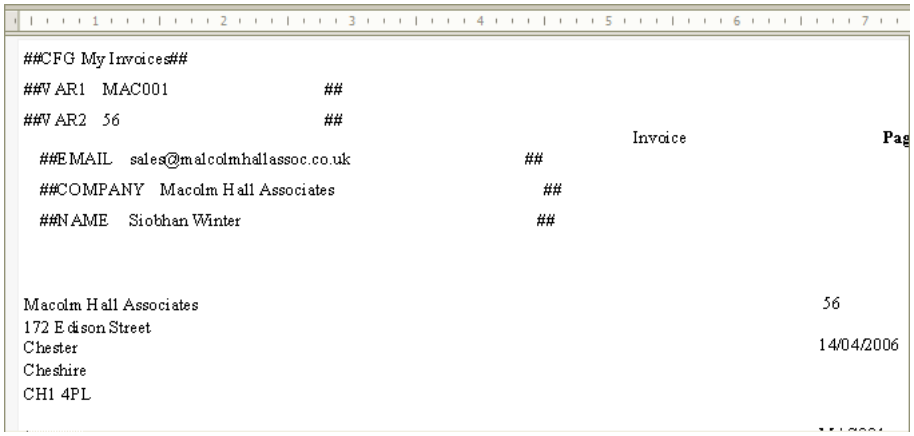
Sage 50 Report Designer Example



Sage 50 report designer

In this example screen shot above we have added several Sage 50 fields and assigned them to various Spindle Document Distribution commands.

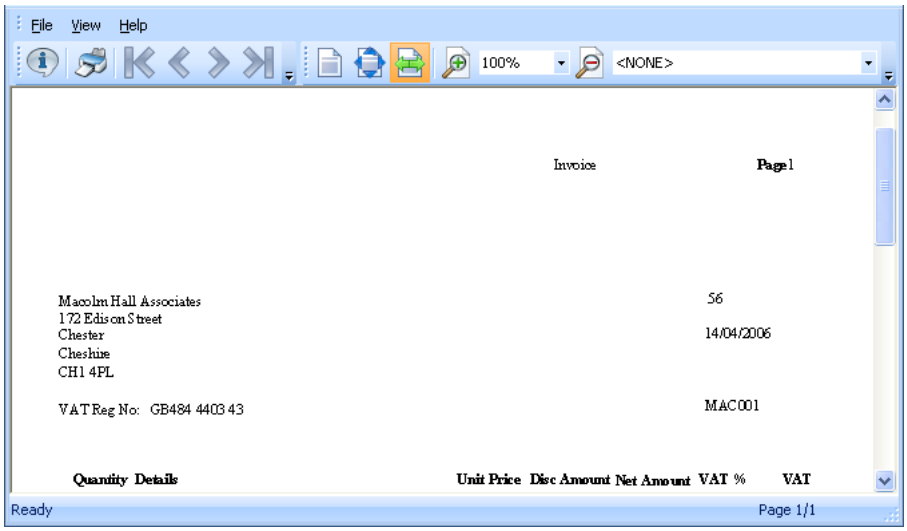
Command	Sage Field	Description
CFG	N/A	This names the Document Type to use, which contains the rules to process this report.
VAR1	ACCOUNT_REF	The customers unique account reference.
VAR2	INVOICE_NUMBER	The actual invoice number.
EMAIL	E_MAIL	The customers email address.
COMPANY	NAME	The name of the customers company.
NAME	CONTACT_NAME	The name of the contact person at the company. This will be the person who receives the invoice.



Previewed report

When the report is produced or printed, the application has replaced the field names with the field value for this customer.

Command	Sage Field	Field Value
VAR1	ACCOUNT_REF	MAC001
VAR2	INVOICE_NUMBER	56
EMAIL	E_MAIL	sales@malcolmhallassoc.co.uk
COMPANY	NAME	Macolm Hall Associates
NAME	CONTACT_NAME	Siobhan Winter



Extracted commands as seen using the Spindle Document Distribution viewer

Finally, when the report is printed to Spindle Document Distribution, we extract the commands from the document and then remove the commands from the page so they are no longer visible. The software can now use these commands to decide how to distribute the document, who to send it to, what backdrop forms to use, and even to get data from other external databases.

In the following sections we have created a number of examples of editing your documents and reports with common applications such as Sage accounts, Microsoft Dynamics and Microsoft Word. If you have any questions about editing your reports you should contact the applications vendor or the person who looks after your application.

To continue the Getting Started tutorial please see Editing Microsoft Word documents.

6

6.7.2.1 Sage Line 50 report designer (v11 - v12)

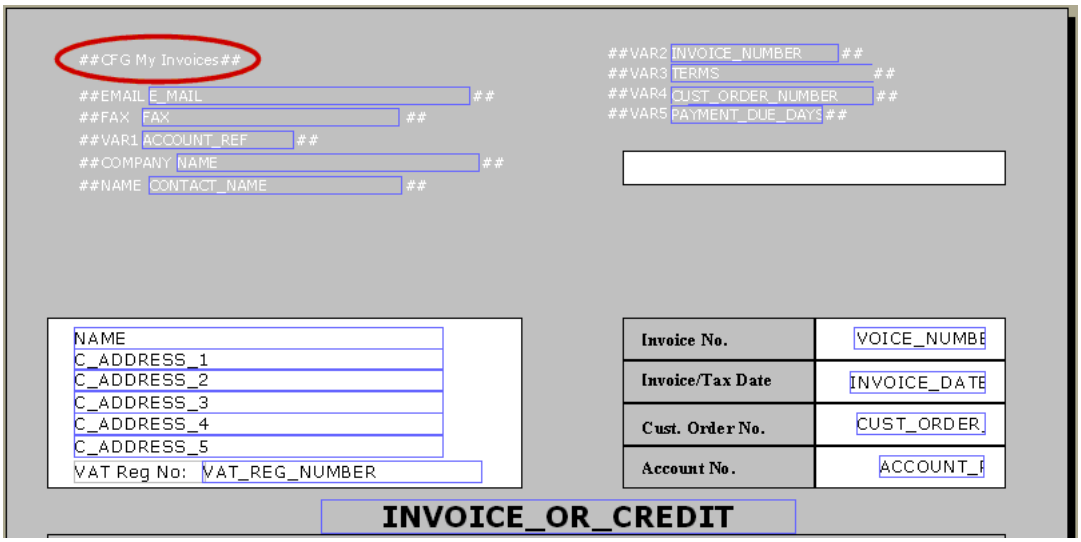
To add embedded command to a Sage Line 50 layout:

1. Launch Sage Line 50 and log on to the required company.
2. From the toolbar select **Reports**. This will launch the Sage Line 50 report designer.
3. When the report designer window appears, open the **LAYOUTS** folder from the tree menu.
4. From the list double click the layout you want to edit. For this example we will use **INVDISA4.SLY**.
5. The layout will open in the report designer.
6. From the toolbar select the **Text** option (the **T** icon).
7. Click an area on the report where you want to place the text box.
8. Type **##CFG Invoices##** where Invoices is the name you have called your Document Type.
9. Select **Save** from the **File** menu to save the new report.
10. Exit the report designer and test your new report layout.

To add embedded commands using Sage Line 50 fields:

1. Follow the previous instructions up to step 5.
2. From the toolbar select the **Text** option and click an area on the report to place the box.
3. Type **##EMAIL** making sure to include a space character at the end.
4. From the **Table** list box on the toolbar select **SALES_LEDGER** and from the **Variable** list box select **E_MAIL**.
5. Click to the right hand side previous text box you created.

6. When the **Active Complete** dialog appears, select **Do not add a title** and press **OK**.
7. Make sure the new variable field lines up with the text box.
8. Select the **Text** option again and click to the right hand side of the variable field on the report.
9. Type ## and make sure the text box lines up with the variable field.
10. Select **Save** from the **File** menu to save the new report.



Tip: If you set the text boxes and variables fields text colour to white you can still print the same layout to plain paper without having any Spindle Document Distribution commands appear on the paper. When printed to the Spindle Document Distribution printer the commands are still 'visible'.

6.7.2.2 Sage 50 report designer (2007 onwards)

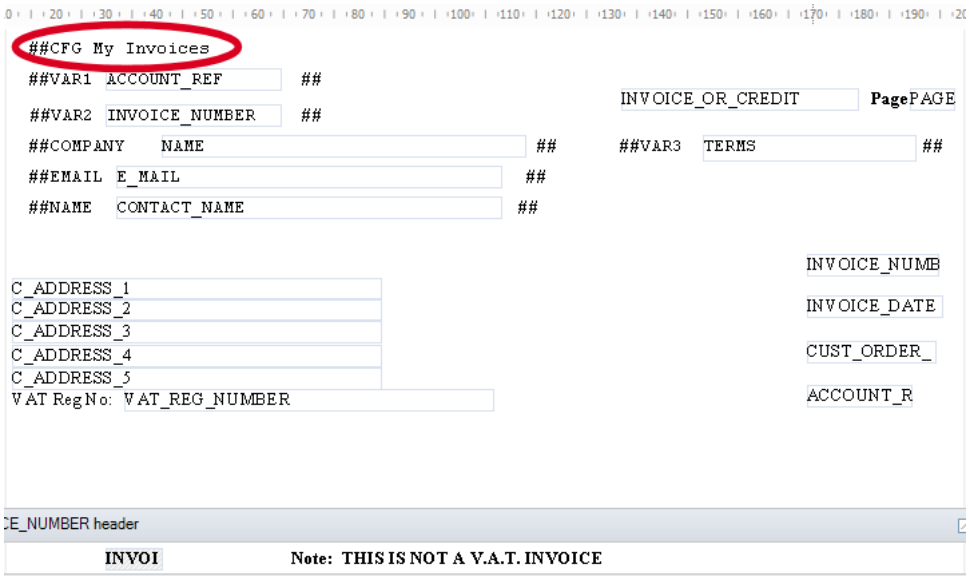
To add embedded commands to a Sage 50 layout:

1. Launch Sage Line 50 and log on to the required company.
2. From the **Tools** menu select **Report Designer**. This will launch the Sage report designer.
3. When the report designer window appears, open the **LAYOUTS** folder from the tree menu.
4. From the list double click the layout you want to edit. For this example we will use **INVDISA4.layout**
5. The layout will open in the report designer.
6. If you cannot see the **Toolbox** window, from the **View** menu select **Toolbox**. This will display the Toolbox window.
7. From the Toolbox window select the **Textbox** option (the Textbox icon).
8. Click an area on the report where you want to place the text box.
9. Type **##CFG Invoices##** where Invoices is the name you have called your Document Type.
10. Select **Save** from the **File** menu to save the new report.
11. Exit the report designer and test your new report layout.

To add embedded commands using Sage 50 fields:

1. Follow the previous instructions up to step 6.
2. From the Toolbox window select the **Textbox** option and click an area on the report to place the box.
3. Type **##EMAIL** making sure to include a space character at the end.
4. From the **Table** list box on the toolbar select **SALES_LEDGER** and from the **Column** list box select **E_MAIL**.

5. Press the **Insert** button (the Insert icon)
6. Left mouse click to the right hand side previous text box you created.
7. **Important!** Make sure this field lines up with the previous text box.
8. Select the **Textbox** option again and click to the right hand side of the field on the report.
9. Type ## and make sure the text box lines up with the previously created field.
10. Select **Save** from the **File** menu to save the new report.

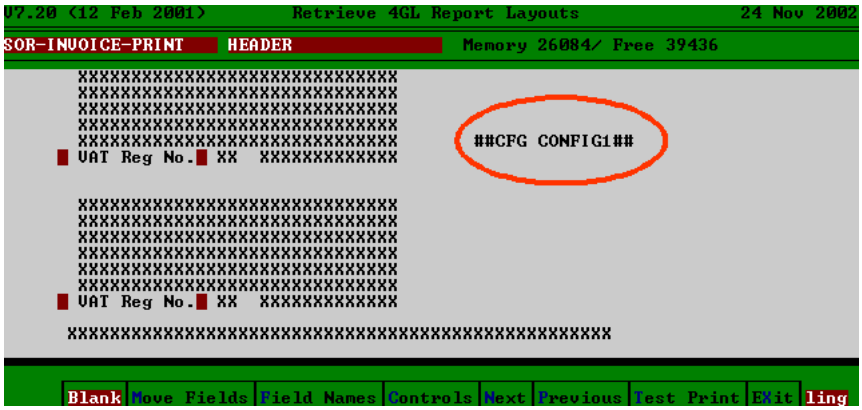


Tip: If you set the text boxes and variables fields text colour to white you can still print the same layout to plain paper without having any Spindle Document Distribution commands appear on the paper. When printed to the Spindle Document Distribution printer the commands are still 'visible'.

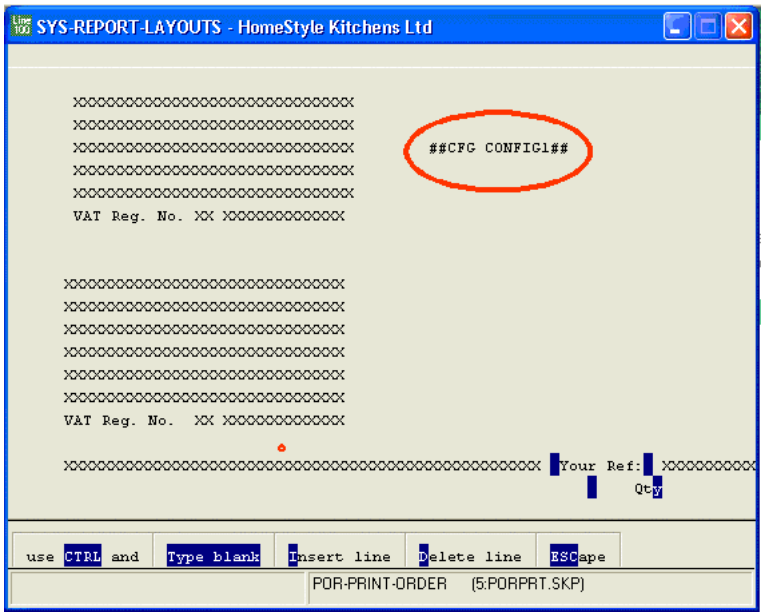
6.7.2.3 Sage Line 100 report designer

To add embedded commands to a Sage Line 100 invoice, sales order processing, purchase order processing and stock control layouts:

1. Log in to Sage Line 100 as a user with a standard menu.
2. Select the required company dataset.
3. Select **Accounting System Manager** then select **System Utilities**.
4. Select **Commercials Report Layouts**.
5. From the list select the required **Module**, e.g. Sales Order Processing.
6. Select the **Layout** you want to change, e.g. Invoicing.
7. Select the **Format** where the command with be placed, e.g. HEADER.
8. Once in the layout select the **Blank** menu option
9. Select an empty area on the layout.
10. Type **##CFG Invoices##** where Invoices is the name you have called your Document Type.
11. Press the **Esc** key and select **Exit** from the menu options.
12. Press **Esc** again and select **Save**.
13. Select the **Update Changes** menu option.



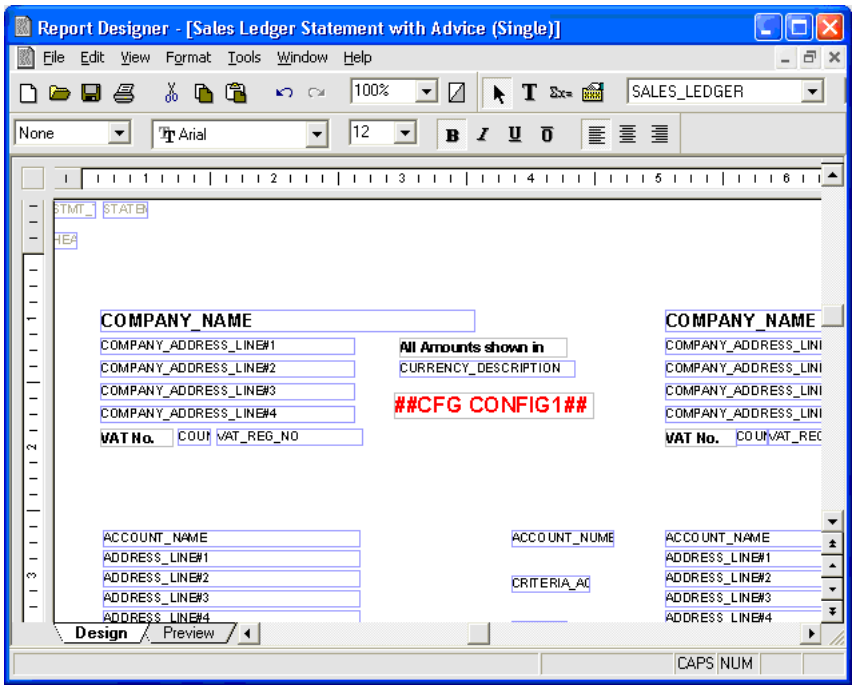
DOS version



Windows version

To add embedded commands to a Sage Line 100 purchase, nominal and cash book ledgers:

1. Log in to Sage Line 100 as a user with the standard menu.
2. Select the required company dataset.
3. From the menu select **Report Designer**
4. When the report designer window appears select the report layout you want to update.
5. The layout will open in the report designer.
6. From the toolbar select the **Text** option (the **T** icon).
7. Click an area on the report where you want to place the text box.
8. Type **##CFG Invoices##** where Invoices is the name you have called your Document Type.
9. Select **Save** from the **File** menu to save the new report.
10. Exit the report designer and test your new report layout.



6.7.2.4 Sage 200 / Sage MMS report designer

To add embedded command to a Sage 200 or Sage MMS report:

1. Launch Sage 200 and log on to the required company.
2. From the shortcut bar select **Report Designer** and select either Financials Reports or Commercials Reports.
3. When the report designer window appears, open the **LAYOUTS** folder from the tree menu.
4. From the list double click the layout you want to edit. For this example we will use **INV Invoice (Single).SLY**.
5. The layout will open in the report designer.
6. From the toolbar select the **Text** option (the **T** icon).
7. Click an area on the report where you want to place the text box.
8. Type **##CFG Invoices##** where Invoices is the name you have called your Document Type.
9. Select **Save** from the **File** menu to save the new report.
10. Exit the report designer and test your new report layout.

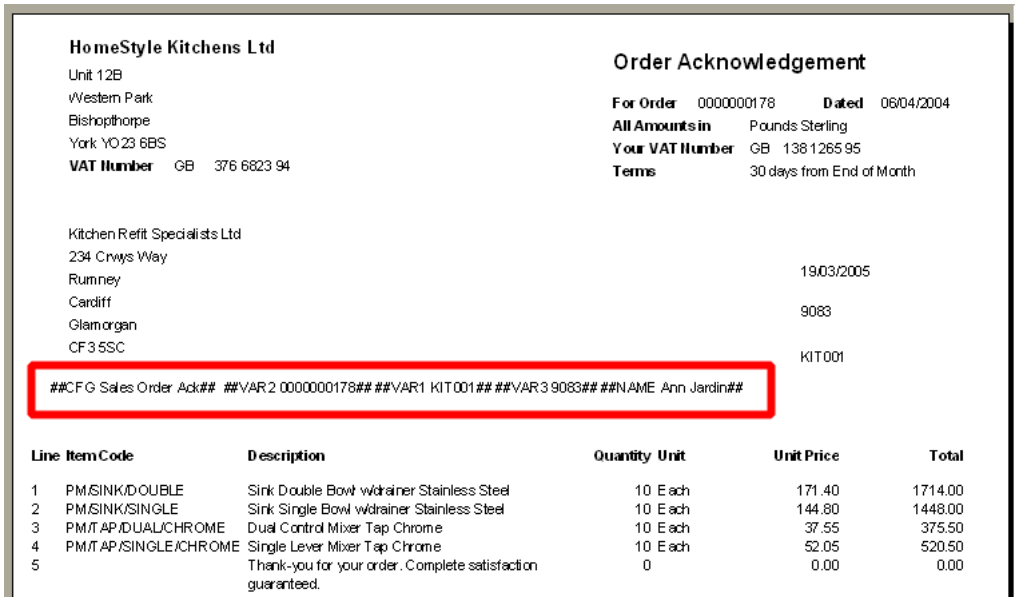
To add embedded commands using Sage 200 or Sage MMS fields:

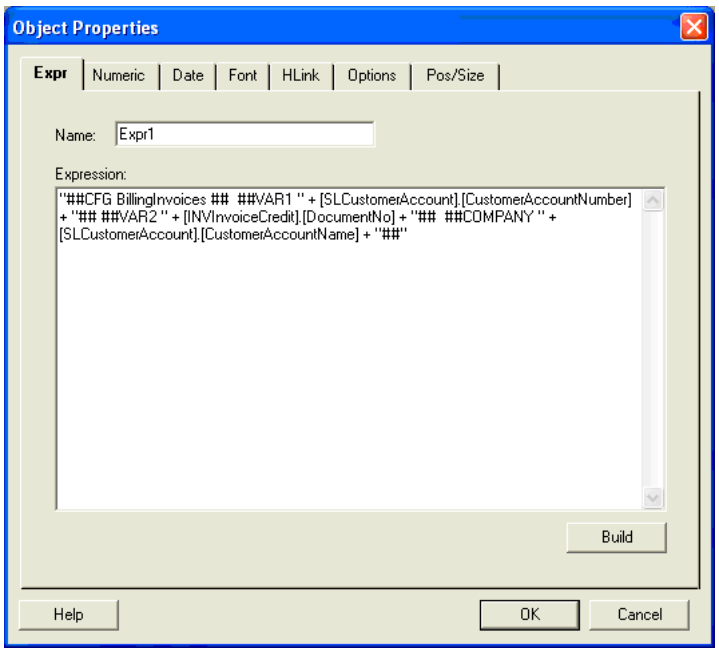
1. Follow the previous instructions up to step 5.
2. From the toolbar select the **Expression** option (the icon).
3. Click an area on the report where you want to place the expression box.
4. When the **Active Complete** dialog appears, select **Do not add a title** and **Do not add a total** and press **OK**.
5. In the **Object Properties** dialog click the **Build** button.
6. In the **Expression** edit box type "**##VAR1 "** making sure to include the quotes and a space character at the end.
7. From the Tables list box select **SLCustomerAccount** and from the Variables select **CustomerAccountNumber**.
8. Click the **Add** button to add the field to the Expression edit box.
9. In the Expression edit box add the text **+ "## "** to the end of the text.
10. The edit box should now contain the text

"##VAR1 " + SLCustomerAccount.CustomerAccountNumber + "## "

11. Press the **OK** button then press the **OK** button again.
12. Select **Save** from the **File** menu to save the new report.

You can continue to add commands to the expression, however you must remember to add a + sign to the beginning of the new ## command (see screen shot below for an example). You can even add the ##CFG command in to the expression rather than having a separate text field.





6.7.2.5 Microsoft Dynamics NAV

Though we provide an example below, report design is an area where variations of approach and customisation are common. Please refer to the help documentation supplied with Microsoft Dynamics NAV and, or the Microsoft Dynamics

NAV specialist responsible for your system.

Microsoft Dynamics NAV 2009 (Including SP1 and R2)

Dynamics NAV Classic Client reports

To add embedded commands to a NAV report for the Classic Client:

1. Launch Microsoft Dynamics NAV Classic Client and open your database.

2. From the toolbar click on **Tools** and then **Object Designer**.

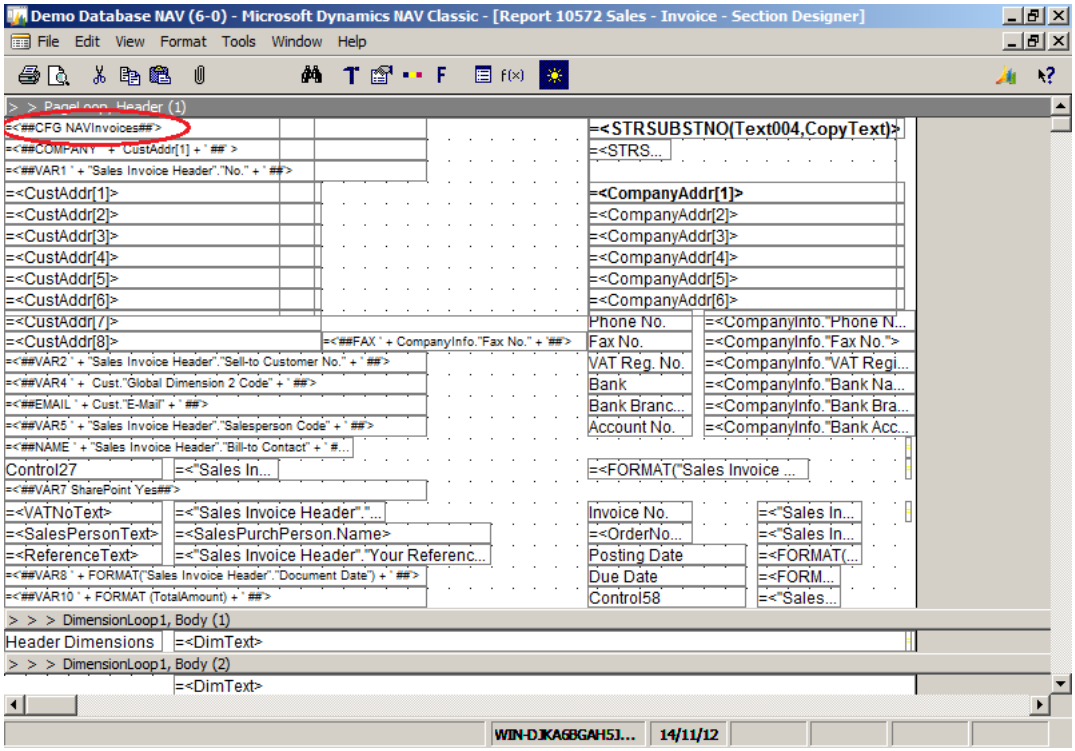
3. From the list, select the report to modify and click **Design**. For example we will use Report ID: 10572 – Sales – Invoice GB. This will bring up the Report Designer.

4. From the toolbar click on **View** and **Sections** to get to the Section Designer.

5. From the toolbar select the **Toolbox** option. From the Toolbox, select the **Text Box** option and click onto a free area on the report layout.

6. Right-click the text box you entered and select **Properties**. Enter the command text into the **SourceExpr** property. For example;

'##CFG NAVInvoices##'



Section Designer

7. Use a suitable naming convention for the **DataSetFieldName** property such as **Spindle_CFG**

8. **Save** and **Compile** the report.

To add embedded commands using NAV fields :

1. Follow the previous instructions up to step 5.

2. Right-click the textbox you entered and select **Properties**. Then click the ellipsis icon on the far right of the property text box.

3. From the resultant C/AL Symbol Menu, select **Sales Invoice Header** from the first list, **FieldName** from the second list

and **No** from the third list and then click **Ok**. This inputs the field into the SourceExpr in the format; **"Sales Invoice Header"."No."**

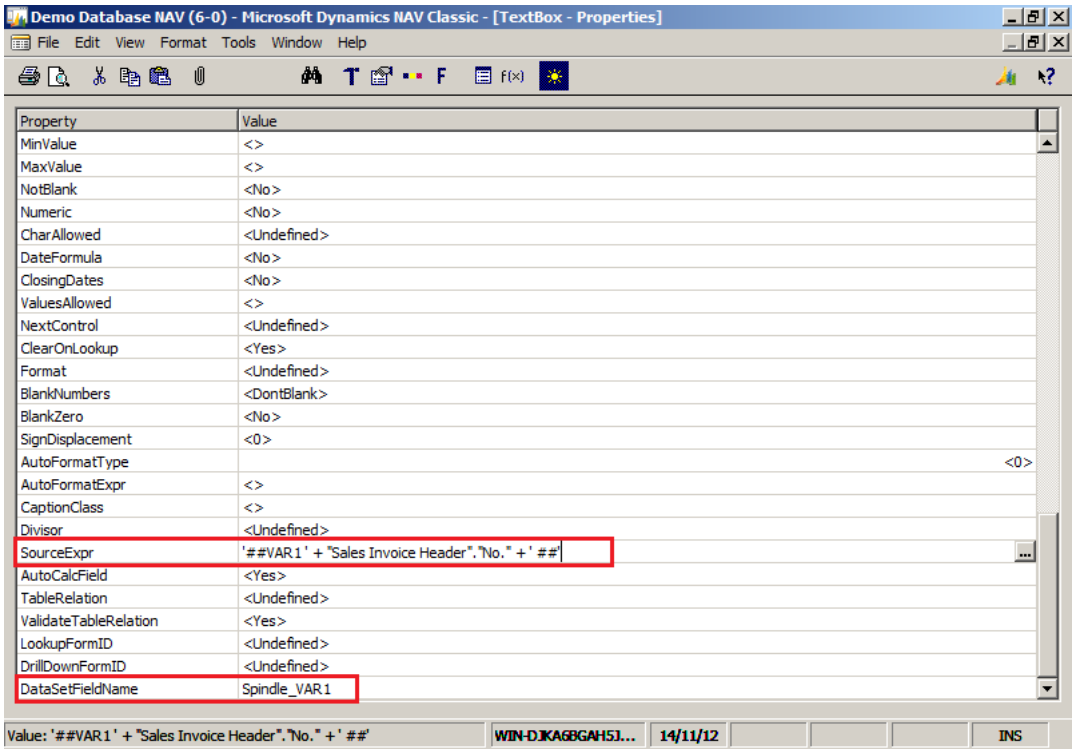
4. You can now wrap the **'##VAR1 ' +** around this NAV field, making sure to include within the single quotes the space character at the end and the **+** symbol.

5. Add the text **+ '##'** to the end of the text.

6. The SourceExpr property should now contain the text.

'##VAR1 ' + "Sales Invoice Header"."No." + '##'

7. Provide a name for the **DataSetFieldName** property such as **Spindle_VAR1**.



Textbox Properties

8. **Save** and **Compile** the report ensuring you click **Yes** to the prompt to load the changes.

Dynamics NAV Role Tailored Client reports

Note: Please review Microsoft's MSDN article - "How to: Print Header Information on Multiple Pages:" for a detailed description of the concepts shown below.

First complete the report layout changes for the Classic Client identified above. Once this is done, follow the steps below.

1. In the Classic Client, from the toolbar select **View** then **Layout**. This will open the report in Visual Studio.

2. Add the commands created in the Classic Client to one of the reports predefined hidden text boxes (e.g. **PageHeaderData**) or create a new hidden text box specifically for holding the Spindle Document Distribution data. We will use the **PageHeaderData** text box in the example below.

Tip: This text box is hidden behind a table and text boxes. Use the drop down list in the Properties Window to select it. (See the screen shot below Step 3). You may wish to apply the **Bring to Front** option also so that the text box is more accessible.

3. Right-click the text box and select **Expression**. Add the **DataSetFieldNames** defined in the Classic Client to the existing expression data as below;

Note: The **+ Chr(177)** is used as a separator between the data fields.

+ Chr(177)

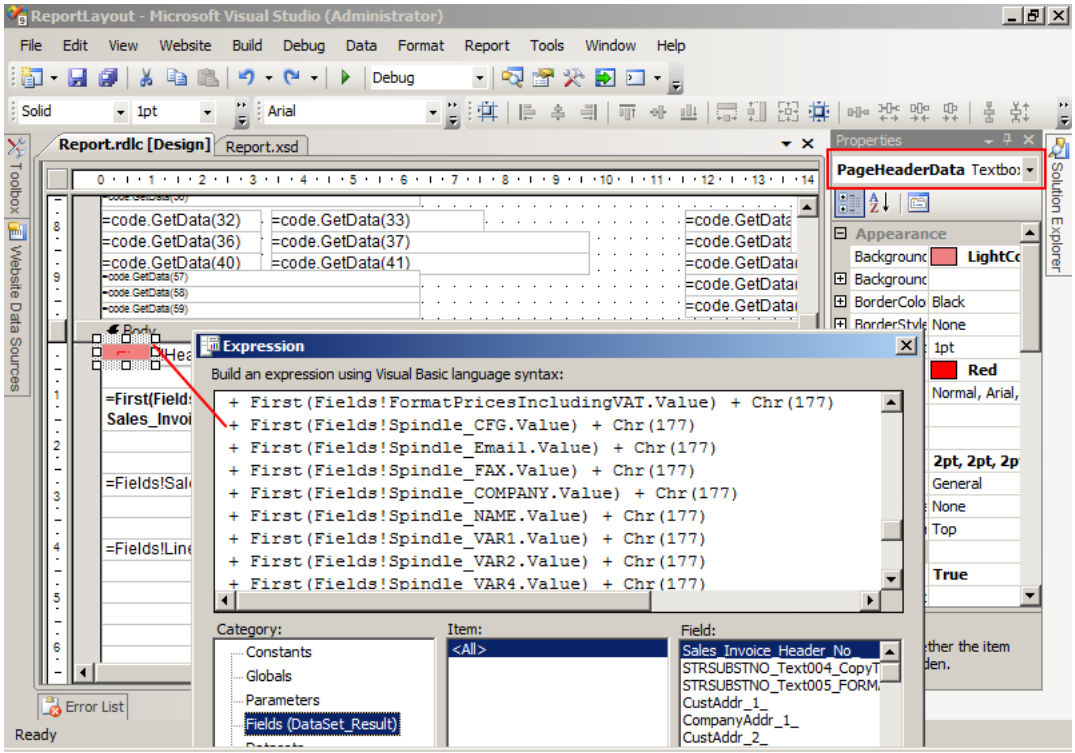
+ First(Fields!Spindle_CFG.Value) + Chr(177)

+ First(Fields!Spindle_Email.Value) + Chr(177)

+ First(Fields!Spindle_FAX.Value) + Chr(177)

+ First(Fields!Spindle_COMPANY.Value) + Chr(177)

You will need to note down the position number of the variables in the expression as this will be used in Step 6 below.



Visual Studio – Hidden Field

4. In the header of the report, a text box is used to hold the Spindle Document Distribution data from the **PageHeaderData** text box. The data is obtained by calling the **SetData** function in the expression of the text box;

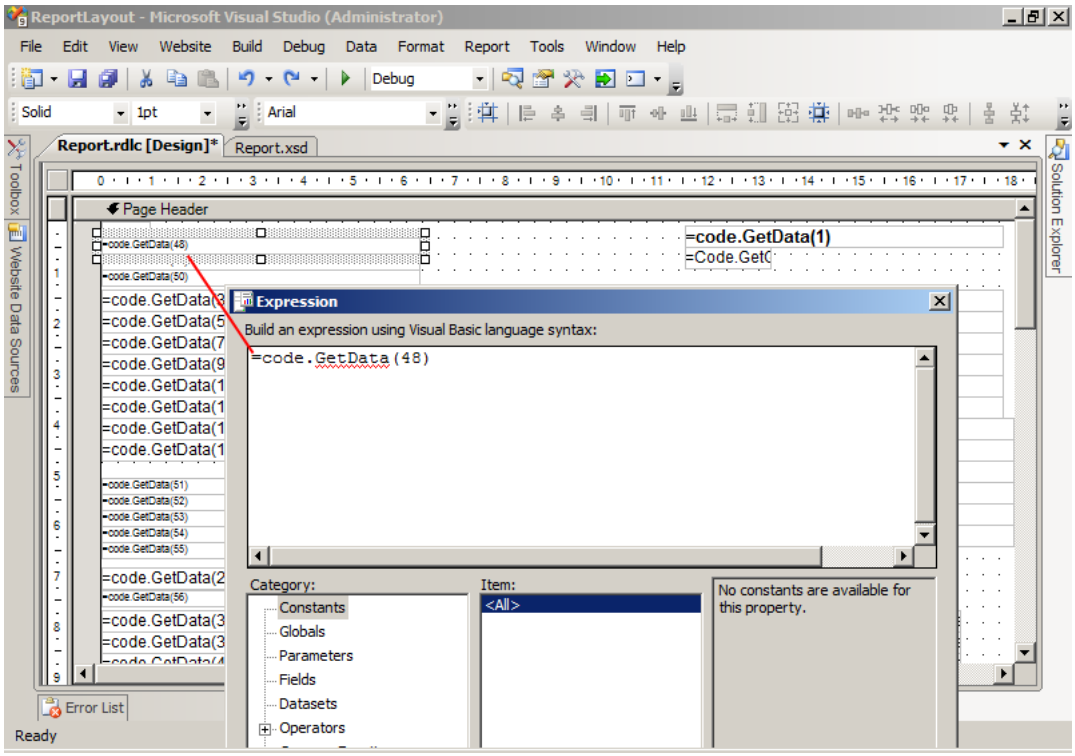
=code.SetData(ReportItems!PageHeaderData.Value)

5. In the report header, add the text boxes to retrieve the individual Spindle Document Distribution data items. Click on **Toolbox** and select **Text Box**. Click on a free area in the header of the report. Change the **Hidden** property to **True**. Right-click the text box and select **Expression**. Type in the following;

Code.GetData(48)

Note: The value 48 is used here because in the **PageHeaderData** text box, the **##CFG** command was the 48th data item in the group of fields.

6. Repeat Step 5 for the other Spindle Document Distribution commands, passing the correct number as a parameter to the **GetData** function.



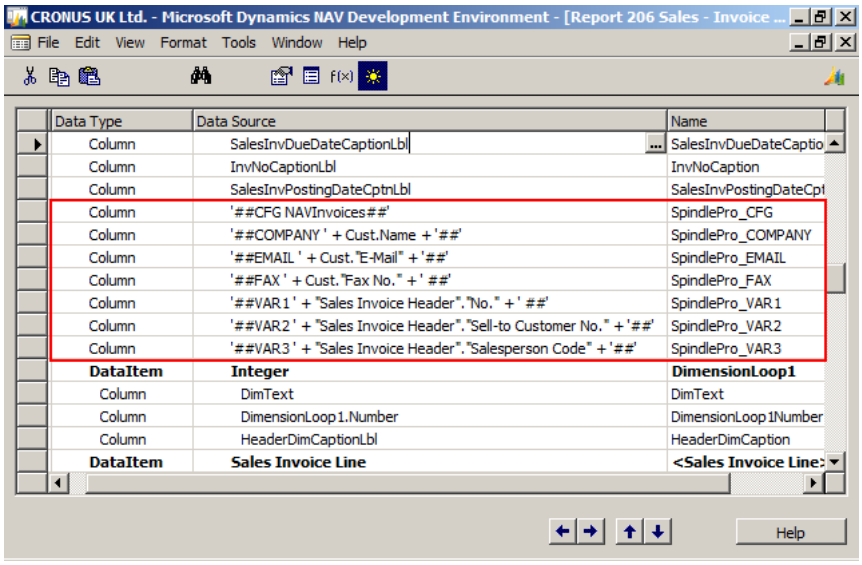
Visual Studio – GetData

7. The report should then be saved and closed. In the Classic Client, ensure you click **Yes** to the prompt to load the changes. Finally, **Save** and **Compile** the report.

Microsoft Dynamics NAV 2013

1. Launch Microsoft Dynamics NAV Development Environment and open your database.
2. From the toolbar click on **Tools** and then **Object Designer**.
3. From the list, select the report to modify and click **Design**. For example we will use Report ID: 206 – Sales – Invoice. This will bring up the Report Dataset Designer, where a grid of Fields and Columns is displayed.
4. Under the relevant **DataItem Data Type**, e.g. PageLoop, add a column for each Spindle Document Distribution command. To do this Right-click and select **New** from the menu. This will create a blank row.
5. Ensure the **Data Type** is set to **Column**.
6. Set the **Data Source** to be the Spindle Document Distribution command string. Provide the column a suitable **Name**, using a naming convention such as **SpindlePro_VAR(N)**. An example Data Source string that would be named SpindlePro_VAR1, is shown below.

'##VAR1 ' + "SalesInvoiceHeader"."No" + '##'



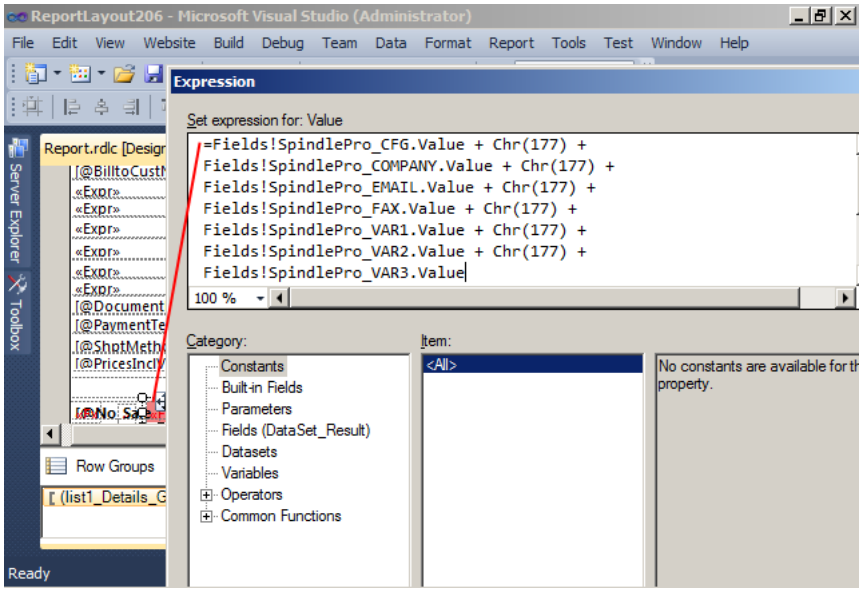
Report Dataset Designer

7. Now from the toolbar select **View** then **Layout**. This will open the report in Visual Studio.
8. Next, add the Data Sources created above as an expression to one of the reports predefined hidden text boxes (e.g. **CustAddr**) or create a new text box specifically for holding the Spindle Document Distribution data. In our example below, we will make use of a new text box called **SpindlePro_Fields**. To create a new hidden text box, click on **Toolbox** and select **Text Box**. Click on a free area in the body of the report. Change the **Hidden** property to **True** and name the text box suitably. E.g. **SpindlePro_Fields**.
9. Right-click the hidden text box and click on **Expression**. Beginning with **=** if the command is the first string in the expression, add the Data Sources defined in the Development Environment to the expression as below;

= First(Fields!SpindlePro_CFG.Value) + Chr(177)

+ First(Fields!SpindlePro_VAR1.Value) + Chr(177)

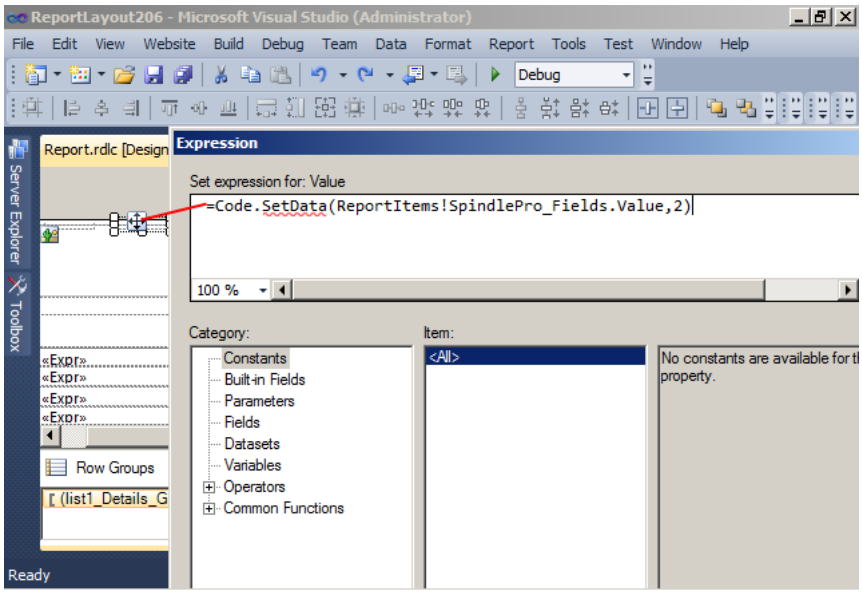
+ First(Fields!SpindlePro_Email.Value)



Visual Studio – Hidden Field

10. Now create a similar text box in the report header to hold the Spindle Document Distribution data held in our hidden text box. Right-click the text box and select **Expression**. The data is obtained by calling the **SetData** function of the report, so type the following;

=code.SetData(ReportItems!SpindlePro_Fields, 2)

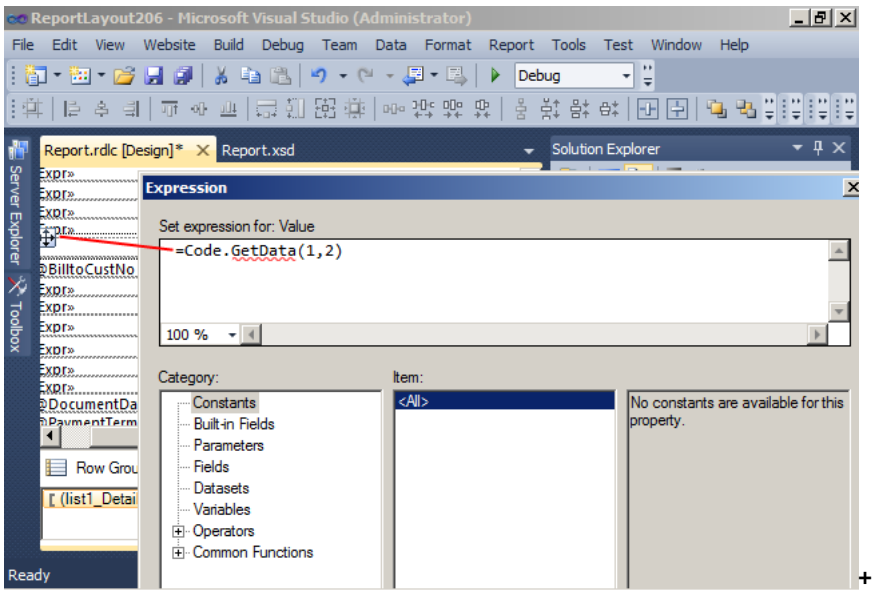


Visual Studio – Set Data

11. In the example above, the first item of the **SpindlePro_Fields** data text box holds the commands is the second data text box of the report as indexed by the **" ...,2)".**

12. Again in the report header, create text boxes to retrieve the individual Spindle Document Distribution data items. Right-click the text box and select **Expression**. Type in the following;

=Code.GetData(1, 2)



Visual Studio – Get Data

Note: The first value of the function call relates to the position of the Spindle Document Distribution command in the text box in the body that holds the Spindle Document Distribution fields. In the above example the first item of the **Spindle_Fields** data text box will be placed on the report.

13. Once all the required Spindle Document Distribution commands have been added, the report in Visual Studio can be saved and closed. In the Development Environment ensure you click **Yes** to the prompt to load changes. Finally, **Save** and **Compile** the report.

6.7.2.6 Sage Office Line

Sage Office Line

This section describes how to modify a report in Office Line Evolution 11 and view the changes in the preview. We then integrate with Spindle Document Distribution by inserting ## commands in the report. As an example we consider the invoice report.

In Office Line an invoice is referred to as Rechnung. The Access report file used for invoices generated in Office Line is stored in OLAbfPrintAdding51.mda project file. There are extra steps to be taken when modifying the report for first time after installation. These steps are listed below.

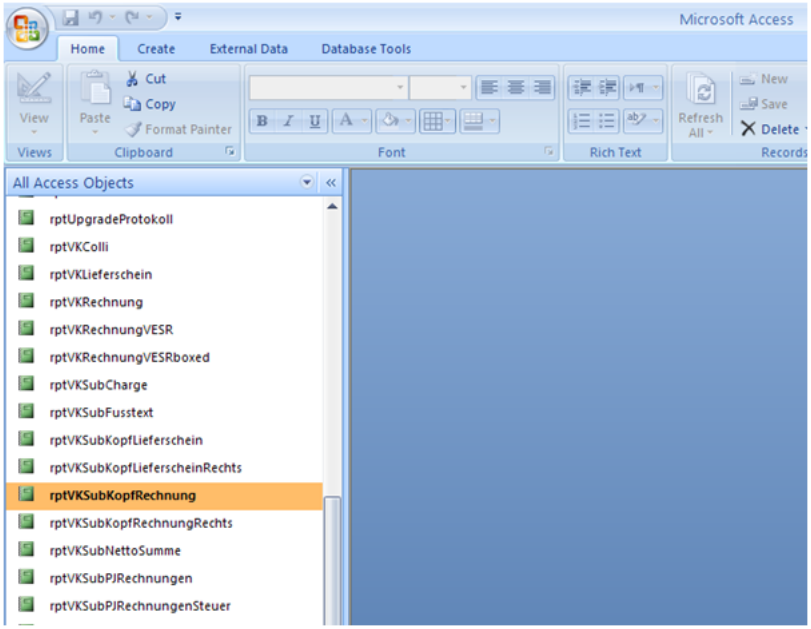
1. Look for file named **'OLAbfPrintAddIn51_Neu.MDA'** under the location **'C:\Program Files\Sage\Office Line\5.1\Addin'**.

2. Copy it to a separate location leaving the instance in the location above as a backup.

3. Rename the copied file from **'OLAbfPrintAddIn51_Neu.MDA'** to **'OLAbfPrintAddIn51.MDA'**.

4. Then using shift + double-click, rather than just double-click, open the file. That way it will open in design mode rather than executing.

5. On the left hand side pane you will see sections for Tables, Reports, Macros and Modules. Under the Reports section look for report item named **'rptVKSubKopfRechnung'**. Right-click it and select **Design View**. This will open the report in design mode.



Selecting the invoice report

6. Modify the report, for instance, by adding a new label. Save the changes and close the window.

7. Copy the file to **'C:\Program Files\Sage\Office Line\5.1\Addin\Work'**.

8. Delete the file named **'OLAbfPrintAddIn51.MDE'** under **'C:\Program Files\Sage\Office Line\5.1\Addin\Work'**.

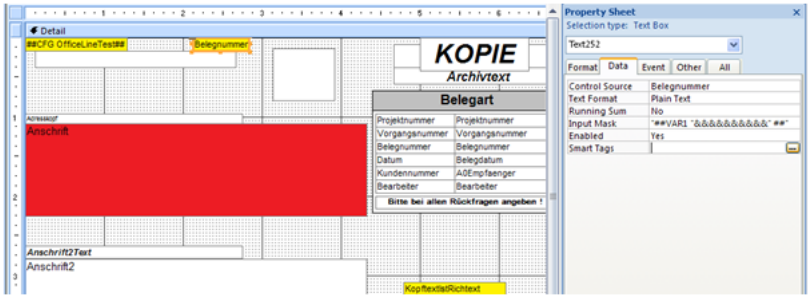
This completes the process of report modification the first time round. For any subsequent changes, just modify the report file in **'OLAbfPrintAddIn51.MDA'** project under the **'C:\Program Files\Sage\Office Line\5.1\Addin\Work'** folder and save the changes.

Integrating with Spindle Document Distribution

Adding a ## CFG command (see page 27) to a report is straightforward. All you need to do is drag and drop a label and set the text content to the command.

Where you require the command to reference the content of a "data bound" field within the application, extra steps are required. You may elect to use three controls, a label with text **'##VAR1'**, a data bound text control containing for instance the invoice number and a trailing label with text **'##'**. Ensuring the controls are aligned in a single line may be time consuming. An alternative solution is to use input mask on the data bound text control. A Microsoft Office article describes the use of input masks. Of special interest in the article are special characters that define input masks. An example of input masks follows.

For a **##VAR1** command containing invoice number set the input mask of the data bound text control to **'##VAR1 '&&&&&&&&&&' ##'**. Now because the whole Spindle Document Distribution command will be contained within a single control there will not an alignment issue. For invoice number set the **Control Source** field under the Data tab of the Properties Sheet for the text control, to **'Belegnummer'**.



Office line report designer data bound text control

Viewing the Report in Office Line

To view the changes inside Office Line, go to **Start > All Programs > Sage Office Line Evolution 2011 > Warenwirtschaft**. Warenwirtschaft is Office Line's warehousing module. In Warenwirtschaft, go to **Workplace** ('Arbeitsplatz' if you haven't run the English language pack). Expand the **Auftragsbearbeitung** node of the tree in the left hand side pane. Double-click **Verkaufsbelege bearbeiten** which will show a form for document creation. Populate the fields in the form by choosing items from the lists displayed. Click the **Belege** button which will display a context menu. Click the option **Infodruck** (print preview).

Note: The immediate background of database bound labels will be white even when set to automatic. Therefore where there is an overlap, it overrides the Spindle Document Distribution background form lines. Checking Enable SAP Business One patch (see page 189) solves the problem by taking out the opaque background.

6.7.2.7 Sage X3

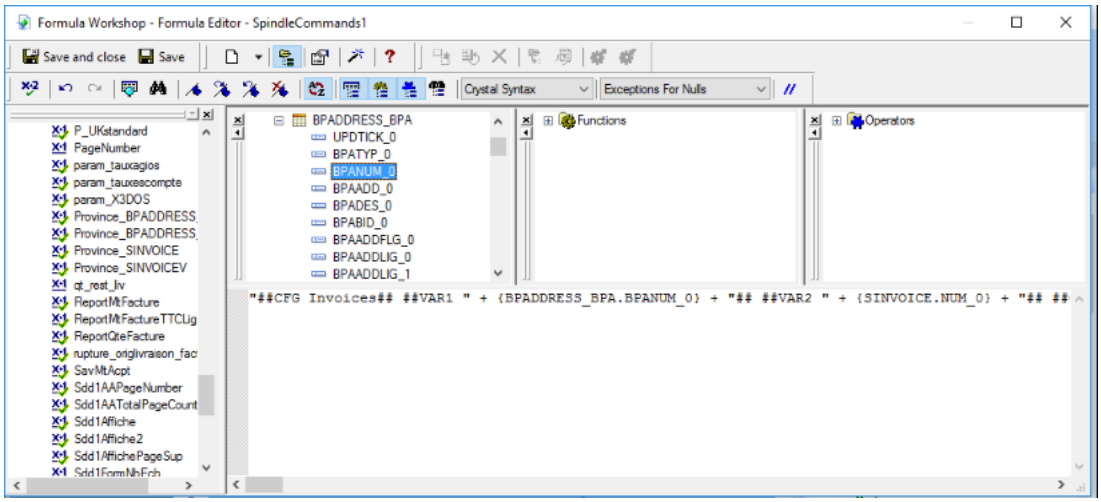
To add embedded commands using Sage X3 fields:

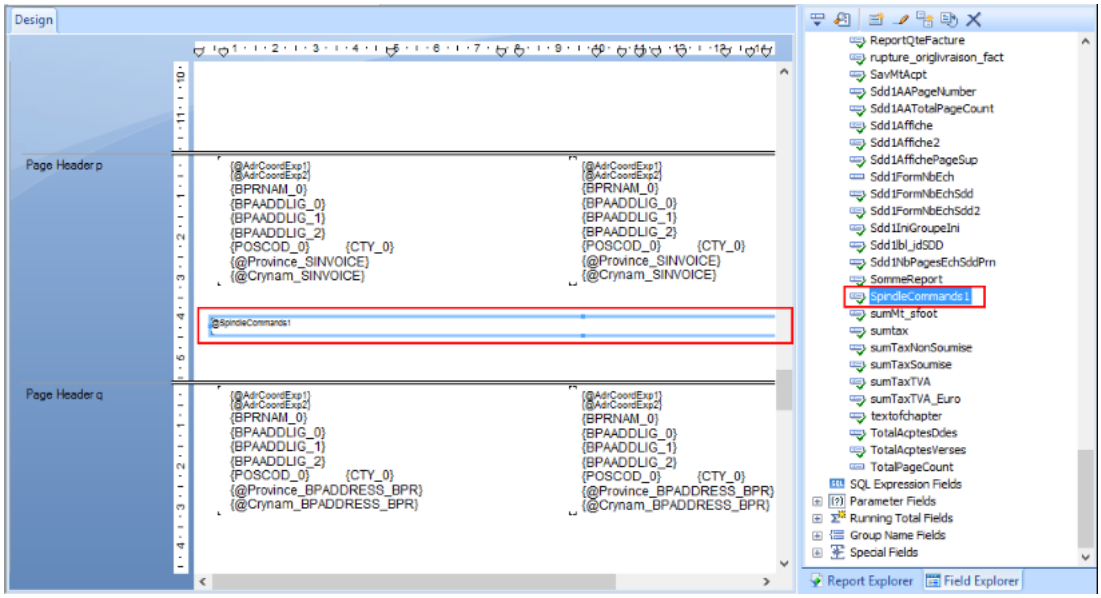
1. Open the relevant report layout in Crystal Reports. For this example we will use a Sales Invoice **(SBONFACP2)**.
2. From the toolbar select the **View** option and then **Field Explorer**.
3. From the **Field Explorer**, scroll down to **Formula Fields**. Right-click on the Formula Fields heading and select **New**.
4. From the **Formula Name** dialog, provide a suitable name for the Formula Field such as **SpindleCommands1.**
5. The Formula Editor dialog box appears.
6. In the **Formula text** edit box, type **"##VAR1 " +** making sure to include the quotes, a space character and the 'plus' symbol at the end.
7. From the Report Fields list box, expand the **BPADDRESS_BPA** table and from the Variables scroll through the list and double click **BPANUM_0**. The field will be added to the **Formula text** edit box next to the existing text.
8. In the **Formula text** edit box add the text **+ "## "** to the end of the text.
9. The edit box should now contain the text **"##VAR1 " + {BPADDRESS_BPA.BPANUM_0} + "##"**
10. Select **Save and close** from the menu to save the formula field.
11. From the **Field Explorer** select the created formula field (SpindleCommands1), and drag and drop the field onto a

suitable area of the report, for example a Page Header.

12. Select **Save** from the **File** menu to save the new report.

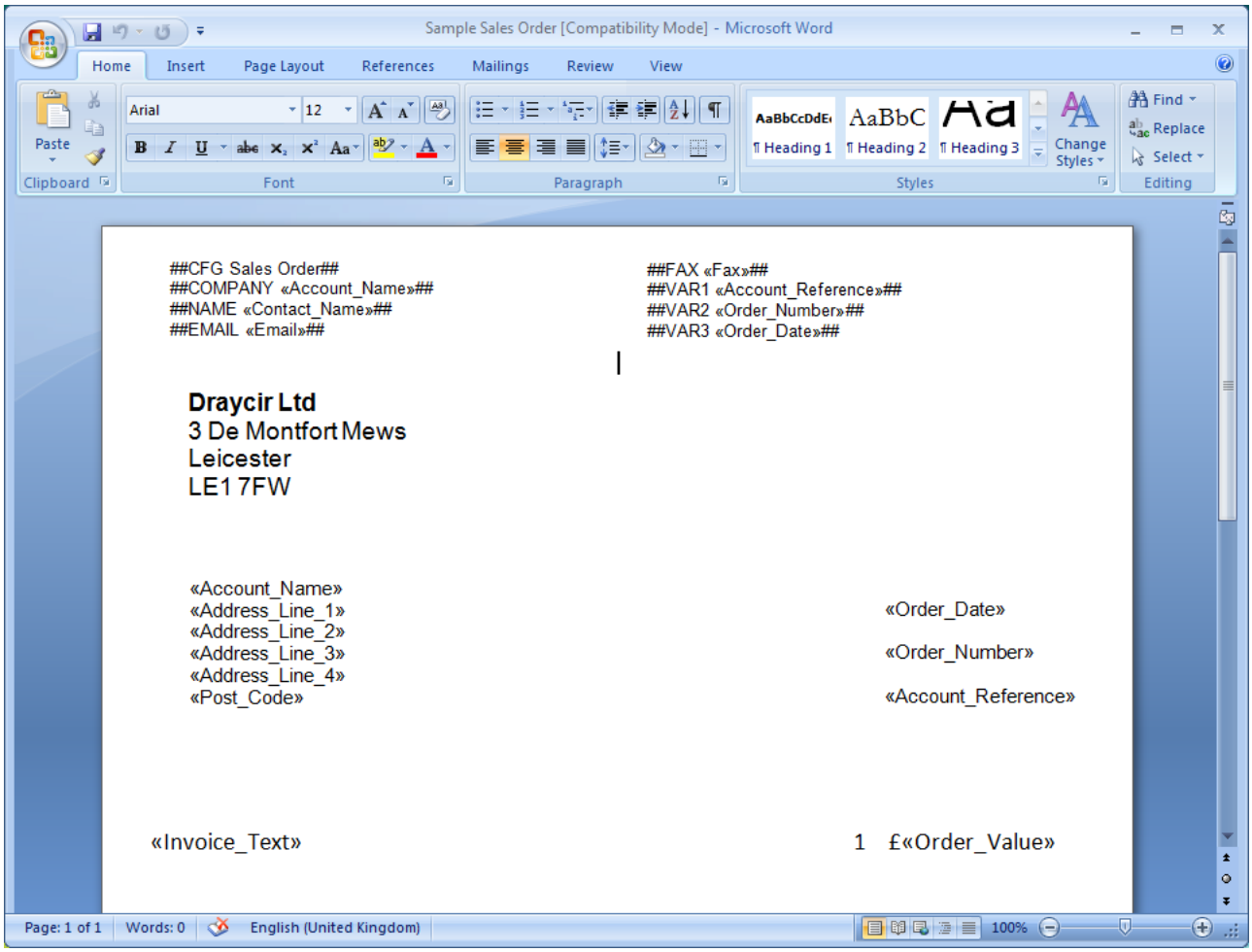
You can continue to add commands to the formula expression by right-clicking the field and selecting **Edit Formula.** However you must remember to add a + sign to the beginning of the new ## command (see screen shot below for an example). You can also add the ##CFG command to the formula expression.





6.7.3 Editing Microsoft Word documents

After opening the sample document **Sample Sales Order.doc**, which uses the standard Word mail merge features, you will see a screen similar to below:



Sample Sales Order.doc

Adding embedded commands into a Microsoft Word document is very easy as you can type in the commands directly, e.g. ##CFG Sales Order##.

Note: Any command used on a document will be removed by Spindle Document Distribution so it will not appear on your emails (in the PDF), faxes, printed or archived documents.

You can see we have used a number of ## commands on the document. This gives Spindle Document Distribution all of the information it needs to successfully distribute the sales orders.

6.8 Creating a Form

Forms or stationery allow you to add your company logos, branding, lines, colours and messages to the documents you print to Spindle Document Distribution. Forms can also be appended onto the end of your documents as extra pages such as your terms and conditions, delivery instructions, directions to your offices or sales messages.

When using Document Automation you can use any number of forms to build up your final design. For example you could have a single form containing your company logo, another form containing a watermark picture and yet another form containing a sales message. Using the tools within Spindle Document Distribution you can effectively layer these forms on top of one another to build your final design.

If you require more power and flexibility you can also use Criteria to selectively add forms. For example, add special terms and conditions if the order value is over a certain amount, or add your opening times over the Christmas holidays if the current month is December.

See Criteria for more information on how to control which forms are used.

Forms can be created from virtually any Windows application that can print. Spindle Document Distribution comes supplied with several form templates that have been created using Microsoft Word. You can access these templates from the Start Menu -> All Program -> Draycir -> Spindle Document Distribution -> Templates.

6.8.1 How to create a Form

You can use a number of different applications to design your forms such as Microsoft Word, Microsoft Publisher, Corel Draw or Adobe Illustrator. In fact you can use virtually any application that can print as you create forms by printing to the Spindle Pro Form Creator printer driver.

The steps to creating a new form are:

1. Designing your form
2. Saving the design
3. Printing it to the Spindle Pro Form Creator printer driver.

The Spindle Pro Forms Creator printer driver captures your form design and saves it to the Spindle Document Distribution Forms Manager. Once in the Form Manager it is ready to be used by Spindle Document Distribution.

6.8.2 Using Microsoft Word as your Form design tool

Although many different applications can be used to create your forms designs, we have focused on using Microsoft Word. We have chosen Word as it common application used by millions of users every single day. Spindle Document Distribution comes supplied with several form templates that have been created using Microsoft Word. You can access these templates from the Start Menu -> All Program -> Draycir -> Spindle Document Distribution -> Templates.

Open up a sample template and add your own company logo, your company address details and even change the font! Form designs are limited only by your imagination.

Below we have listed a number of tips for using Microsoft Word to create form designs:

Tip 1. Using Grids

Use a small grid on your document to easily position images, boxes and lines. The Grid within Microsoft Word is used to quickly align objects (images, boxes, lines) by using your cursor/arrow keys. Whenever you pick up an object and use your up, down, left or right keys you can see the object moves by a certain amount, the amount is controlled by the Grid. Setting the Grid to a small value enables you to control the lining up of objects very easily.

Word 2000 and 2003

1. Turn on your drawing toolbar by selecting the **View** menu, **Toolbars** then **Drawing**.
2. Select **Draw**.
3. Select **Grid**.
4. Set the Grid to 0.05cm by 0.05cm.

Word 2007

1. Select the **Page Layout** ribbon.
2. Select **Align**.

3. Select **Grid** Settings.
4. Set the Grid to 0.05cm by 0.05cm.

Tip 2. Rectangles for boxes

Whenever you want to draw a box on your design use the Rectangle feature to do this. Rectangles are easy to draw, edit and move around. If you want to enter some text into your box then you need to use a Text Box, but if you don't you should use a Rectangle.

Word 2000 and 2003

1. Turn on your drawing toolbar by selecting the **View** menu, **Toolbars** then **Drawing**.
2. Click on the **Rectangle** button.
3. Move your mouse pointer to where you want the top left corner of your box to start.
4. Click and hold down your left mouse button and drag your mouse down and to the right.
5. Release your mouse button when the box is the right size.

Word 2007

1. Select the **Insert** ribbon.
2. Click on **Shapes**.
3. Click on the **Rectangle** button.
4. Move your mouse pointer to where you want the top left corner of your box to start.
5. Click and hold down your left mouse button and drag your mouse down and to the right.
6. Release your mouse button when the box is the right size.

For more information on Rectangles please refer to the help files within Microsoft Word.

Tip 3. Text boxes for labels

If you want to enter text on your design like 'Deliver To', 'Account Number' or '10% off this week' you should use a **Text Box.** Text Boxes enable you to draw a box and enter some text. Text Boxes can be moved and positioned anywhere on your design and are ideal for labels and messages. However if you want to just draw a box then you should use a **Rectangle** instead.

For more information on Text Boxes please refer to the help files within Microsoft Word.

Tip 4. Using Watermark Images

One of the advantages of using forms within Spindle Document Distribution is it allows you to place logos, lines and images anywhere on the document. Some applications (such as accounting systems) do not let you place items in the transactions area, therefore restricting the design of your documents.

To place an image as a watermark image in your document:

Word 2000 and 2003

1. Click on **Insert**.
2. Select **Picture**.
3. Select **From File**.
4. Find and select your image.

Word 2007

1. Select **Insert** ribbon.
2. Select **Picture**.
3. Find and select your image.

Sizing / Moving / Watermarking the image

Once your image is in the document you now need to size and move it to the right location. To size the image simply click on one of the corners of the image and drag your mouse to re-size it. To move your image, right click on the image and:

Word 2000 and 2003

1. Select **Format object** or **Format Picture**.
2. Select the **Layout** tab then select **In front of text** and click **OK**.

Word 2007

1. Right click on your image.
2. Select **Text Wrapping**.
3. Select **In front of text**.

This option means your image will float over the top of the document enabling you to place it in exactly the location you want. Once you are happy with the location of the image, you need to watermark it and possibly put it behind other elements, such as lines etc., on your document.

To watermark your image, right click on your image and:

Word 2000 and 2003

1. Select **Format object** or **Format Picture**.
2. Select the **Picture** tab.
3. Use the **Image Control** settings under the **Color** area to adjust the brightness and contrast settings.
4. Click **OK**.

Word 2007

1. Select **Format object** or **Format Picture**.
2. Click on the **Picture** button.
3. Use the controls to adjust the brightness and contrast settings.
4. Click **Close**.

Tip 5. How to draw straight lines

Drawing a straight line either vertically or horizontally is easier than you think. Simply draw your line and whilst you have the left mouse button held down push and hold the **Shift** key on your keyboard. You will see the line will straighten and if you move your mouse up and down or left and right you will see the line snap to the Grid (see using the Grid above). When you are happy that your line is straight release your left mouse button.

Tip 6. Save your design often!

Don't forget to save your Word document on a regular basis! If you make mistakes or your computer crashes you won't lose hours of design work.

Always make sure you backup your Word document designs and look after them. Once they are in Spindle Document Distribution Form Manager you cannot edit or change them without the original design file. **If you lose your Word document design then you cannot edit or change your design with redoing it from scratch!**

6.8.3 Turning your design into a Spindle Document Distribution form

Once you've finished your form design using Microsoft Word you need to get it into Spindle Document Distribution. This is

very easy! Print your Word document to the **Spindle Pro Form Creator** printer. You will be prompted for the name of the form which, by default, is the name of the Word document. We recommend that before printing your form design, you save your Word document under the same name that you want to call the form. This way your document will match the name of the form in Spindle Document Distribution and when you come to change or update your design you wont struggle to find the original Word document.

After you have accepted the form name press OK and the Spindle Document Distribution Form Creator print driver captures your document, turns it into a form design and saves it in the Spindle Document Distribution Forms Manager.

For more information creating forms see the Form Manager (see page 151) section under Configuring Spindle Document Distribution.

6.8.4 Updating or changing a Form Design

Find and open your original Word document design and make your changes. When done print the document to the Spindle Pro Form Creator printer. If your Word document file is the same name as the form already in the Spindle Document Distribution Form Manager you will be prompted to overwrite the existing form.

If you called the form another name when you originally created it or have renamed the form in the Form Manager then you will be prompted to enter a name for this form. This will not overwrite the original form but will add this form to the list of available forms. If you know the name of the form you want to overwrite then you can enter it here. When you press OK you will be prompted to overwrite the existing form.

6.9 Creating a Rule

Now you have your form design and the ## commands in your report designer file, you are ready to create the rule that will determine how your document is distributed.

The process of automatically distributing a document is called Document Automation and can be broken down into three parts:

1. Document Types
2. Document Operations
3. Document Settings

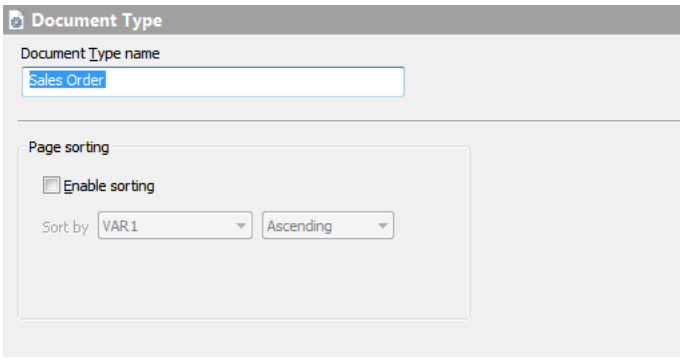
In the next sections we go through setting up each step.

6.9.1 Creating a Document Type

Creating a Document Type

Load the Spindle Document Distribution Tools, select **Document Automation**, right click on **Global Document Type** and select **New Document Type**.

The name you give your document type should match the value in your CFG command on your document. If your CFG command is **##CFG Sales Order##**, the document type needs to be called **Sales Order**.

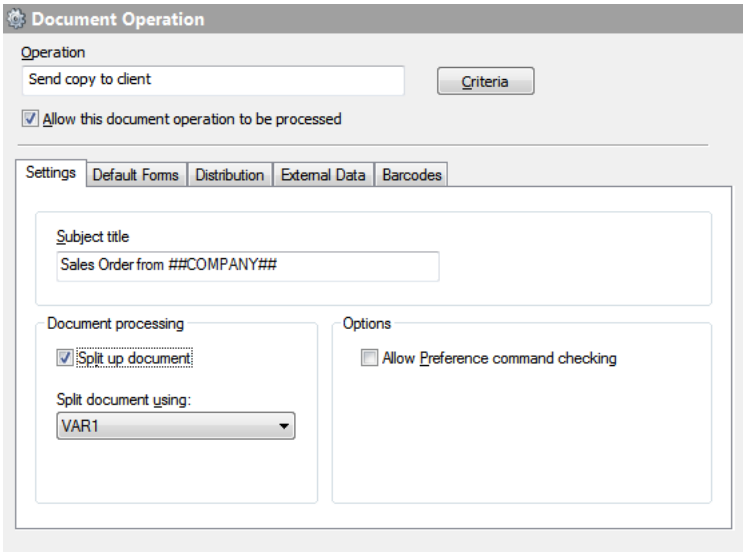


Document Type settings

6.9.2 Creating a Document Operation

Creating a Document Operation

Right click on the document type you have just created and select **New Operation**. The name of your operation is best used to describe where the document is going to be sent or who it is for. For example 'Send copy to client', 'Warehouse Copy', 'Sales Persons Copy' etc. In this example call it 'Send copy to client'.



Document Operation settings

Settings tab

Enter the subject of your document in **Subject title**. Subjects are used in emails, some fax solution and printer queues. You can use any of your ## commands to personalise the subject. For example entering the text 'Sales Order from ##COMPANY##' would become 'Sales Order from Better Kitchens' when the document is distributed.

You can use ## commands in any part of Spindle Document Distribution Tools. Enter ##, followed by the command name, followed by ##, all entered with no spaces between them. E.g. ##VAR1## etc.

To divide your document into individual documents and send via different methods (email, fax or print) tick **Split up document** and set **Split document using:** to VAR1. We have now setup our split variable. We discussed the split variable earlier in the section Using Commands.

Default Forms tab

Select **Normal** in the **List type** section. Click **Add** and select the form you created earlier in this tutorial. Forms can be built

up in layers by adding multiple forms. The forms are layered from bottom to top, the first form in the list will go on the bottom and the next on top of it and so on.

Distribution tab

The Distribution tab controls the method and priority in which the document is distributed. Select the distribution method order by dropping down the options on 1st, 2nd and 3rd boxes in the **Distribution method order** section. In this example, select **Email** as 1st, **Fax** as 2nd and **Print** as 3rd.

The values for the Email and Fax methods are taken from the ##EMAIL and ##FAX commands, which have been extracted from the document or taken from a database. If these commands are empty Spindle Document Distribution will move down the list of methods until it finds a successful way of distributing the document.

In this example, the recipient does not have an email address in the document, the ##EMAIL command on the page will be empty. Spindle Document Distribution will evaluate the 1st method and see there is no email address and go on to evaluate the 2nd. If the contents of the ##FAX command is populated Spindle Document Distribution will attempt to fax the document. If however it is also empty, Spindle Document Distribution will evaluate the 3rd method and print the document.

You do not have to use all three options. If required you can just set the 1st method as Email and the 2nd method as Print. In this example the document would never be faxed.

There maybe times when you want to only send a document using email but if the recipients email address is blank then the document is not sent at all. A good scenario for this is distributing delivery notes. You can have a document operation that prints the document to the warehouse and another operation that emails the document to the customer. Also, you do not want to fax the document and there is no point in posting it because the goods will arrive at the same time with the printed delivery note on the box. In this scenario you would set the 1st method as Email and set the remaining methods as <NONE>.

As you select each of the distribution methods, various setting options appear under the document operation.

Tip: The Print option will always be successful when evaluated. Setting the 1st method to Print means the document will always be printed no matter what you set in 2nd or 3rd methods.

6.9.3 Configuring Document Settings

Printer Settings

Select the printer you want the document printed to if it cannot be emailed or faxed. Choose the printer from the **Select printer** drop-down list.The printers listed include the default Windows printer, the Spindle Document Distribution default printer, the printers installed on your computer and any Printer Profiles you may have created.

If you select a printer installed on your computer make sure that all computers with Spindle Document Distribution installed also have access to the same printer driver otherwise they will receive an error message when distributing this document.

See the section Printer Settings (see page 74) for more information.

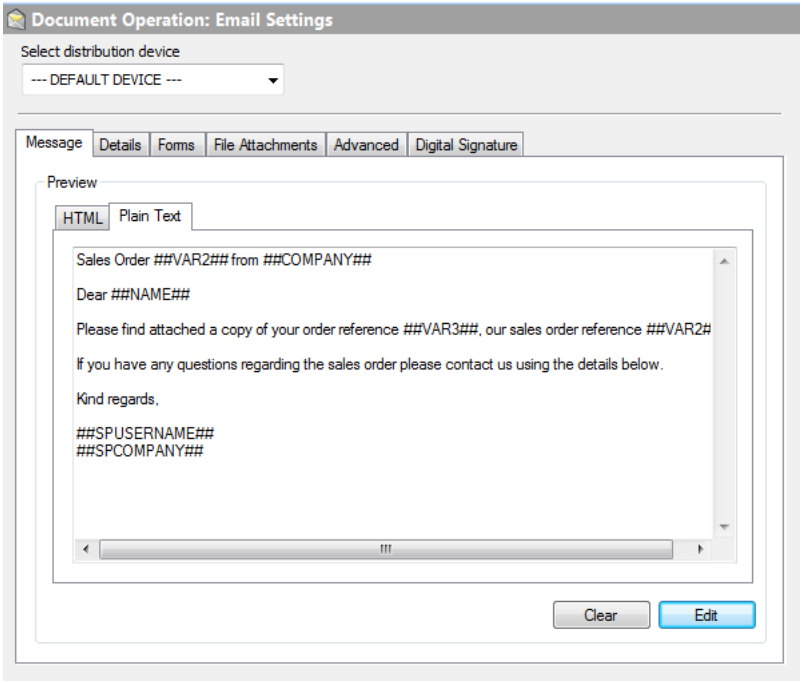
Fax Settings

Since we will use the fax number taken from the ##FAX## command we do not need to alter many of these settings. Click on the **Advanced tab** and tick **Place faxes on hold**. Spindle Document Distribution will ask the faxing solution to hold any faxes before it sends them out, however not all fax solutions support the holding of faxes.

See the section Fax Settings (see page 78) for more information.

Email Settings

The Message area is where you enter the body of text the email recipient will receive. The printed document will be attached to the email as an Adobe PDF file. You can use ## commands to personalise the body text message. See the screen-shot below:



Example email message body text

Spindle Document Distribution also supports HTML emails and an HTML editor is included however not all email connectors in Spindle Document Distribution support the sending of HTML emails.

Click on the **Advanced tab** and tick **Place emails on hold**. Spindle Document Distribution asks the emailing solution to create the emails in the drafts folder and not send them out directly, however not all email solutions support this option.

Tick **Override default attachment name** and type 'Sales Order ##VAR2##'. This will name the file attached 'Sales Order 00001234.pdf'. It is always a good idea to name the document as it looks more professional and will help it not to get lost at the recipients end.

See the section Email Settings (see page 81) for more information.

Click on the name of your document operation in the document tree to save your settings.

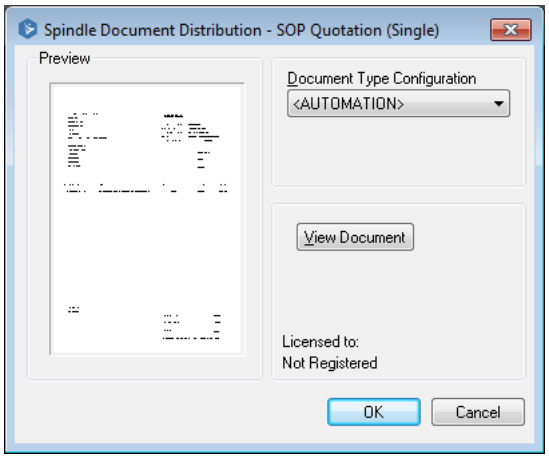
6.10 Distributing your document or report

If you have worked your way through the other sections of Getting Started then you are ready to distribute your first document.

Load your application and produce the report or document that you have entered the commands into. If you are using our sample sales order document then load Microsoft Word and run the mail merge on the document.

Print your document to the **Spindle Pro** printer. Print only 1 to 2 pages since this is your first attempt at using Spindle Document Distribution.

After your application has finished printing you will be presented with the Spindle Document Distribution Processor dialog box.



Spindle Document Distribution Processor dialog

If you have successfully linked a document with a document type then **Document Type Configuration** should state **<AUTOMATION>**. This means Spindle Document Distribution has extracted the CFG command from the page and found a corresponding document type. If Document Type Configuration contains <NONE> then either no CFG command was found or there is no matching document type of the same name. Check the spelling in both the document and Spindle Document Distribution Tools.

Press the OK button to continue.

Spindle Document Distribution will start distributing the document. The progress bar indicates how far through the processing your document is. Once it has reached the end, the processing of your document has finished. Check your email or fax software, or check your printer to review the output Spindle Document Distribution has produced.

7 Configuring Spindle Document Distribution

7.1 Entering a Licence Key

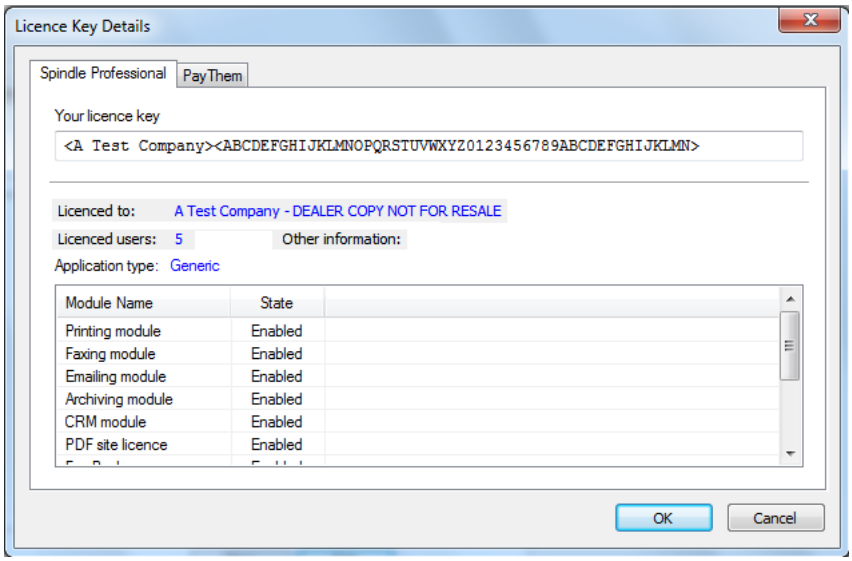
Your licence key can be found on the inside front cover of your Spindle Document Distribution CD or may have been emailed to you by your Draycir Partner. If you do not have a CD or licence key please contact your Draycir Partner support team.

The licence key unlocks Spindle Document Distribution and can only be used by your company. Your key may also be associated with one of your primary applications (e.g. Sage 200, Microsoft Dynamics NAV, Sage 50 etc.)

Example licence key

```
<A Test Company><ABCDEFGHIJKLMNOPQRSTUVWXYZ0132456789ABCDEFGHIJKLMN>
```

The licence key starts at the first (less than) character **'<'** and ends on the very last (greater than) character **'>'**. It also contains the name of the licensed company.



The Licence Key dialog box

Entering a Licence Key

Spindle Professional tab

1. Launch Spindle Document Distribution Tools.
2. Click the icon on the main toolbar or from the **Tools** menu select **Licence Key**.
3. In the **Licence Key Details** dialog box enter your licence key in **Your licence key.**
4. If entered correctly you will immediately see your licence details.
5. Click OK to save the licence key.

If the **Licenced to** name is not the name of your company please contact Draycir on 0845 123 2941 or email support@draycir.com. For any errors or warnings when entering your licence key please refer to the Troubleshooting section.

PayThem tab

To enable the PayThem (see page 141) functionality, you will need to enter a PayThem licence key (this is separate from your Spindle Professional product key).

1. Launch Spindle Document Distribution Tools.
2. Click the  icon on the main toolbar or from the **Tools** menu select **Licence Key**.
3. In the **Licence Key Details**, select the PayThem tab.
4. Enter your PayThem key in **PayThem key.**

7.2 Document Automation

Document Automation allows you to define a set of distribution rules and actions which describe the streamlining process that Spindle Document Distribution brings to the delivery and presentation of your documents. These rules and actions may include:

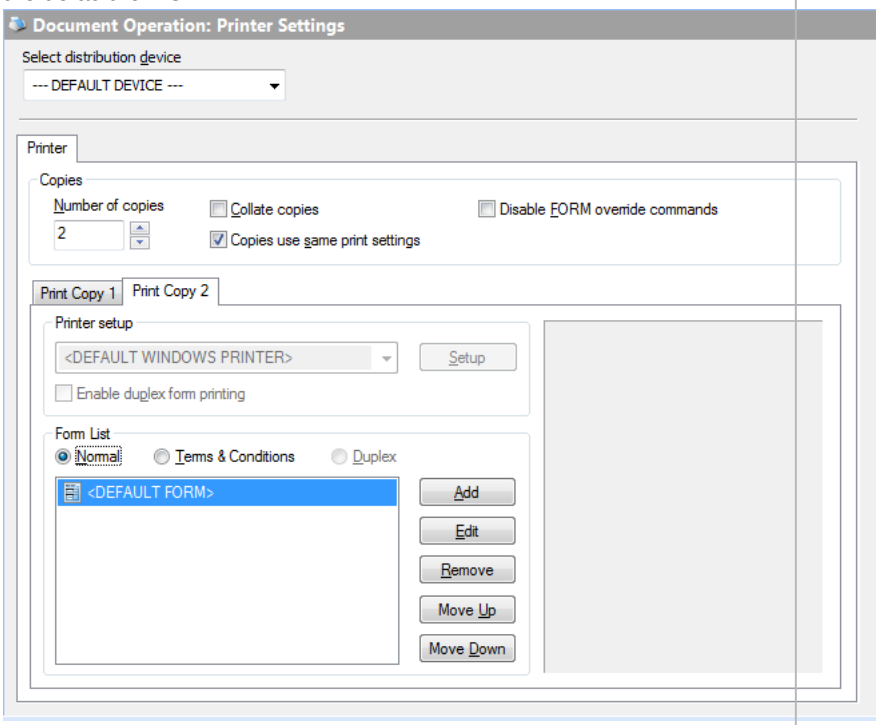
- How to deliver the document (email, fax, print etc).
- Number of copies required.
- Which form (stationery) to use.
- How the document will be archived.
- Whether you write information to the CRM system.

For example, invoices could either be emailed, faxed or printed depending on what destination information is available to the client. At the same time a copy could be printed to the accounts printer for internal use and a copy could also be electronically archived.

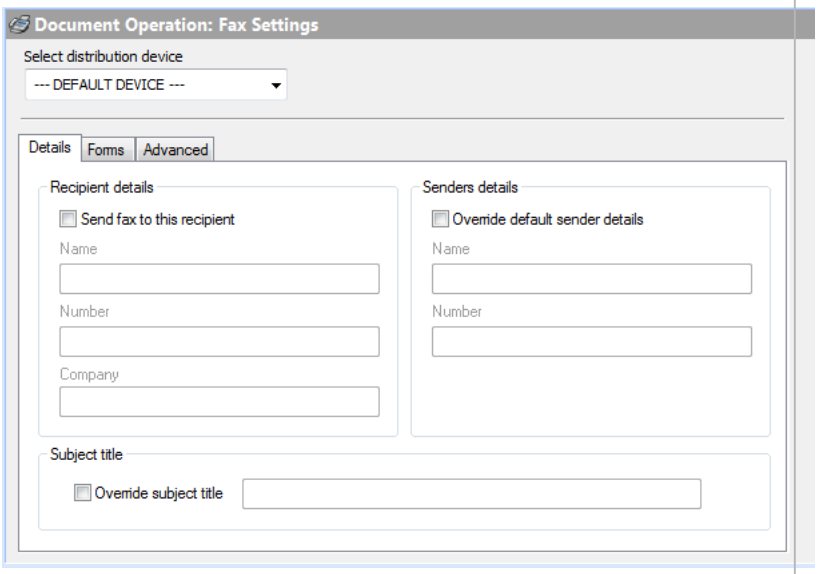
Because the rules are pre-defined, the person printing the invoice does not need to remember which form is required, how many copies are needed or where they should go.

Document Automation is achieved by placing Spindle Document Distribution commands in your documents and/or using external data sources. When the document is printed to the Spindle Document Distribution printer these commands are removed from the document and used to determine how the document should be processed.

Document Settings

Name	Description
Printer Settings (see page 74)	Printer settings are enabled if you have selected Print as one of your distribution types in the Document Operations Distribution Tab (see page 66). These settings are used when a document requires printing. The settings you can change in this section include selecting the destination printer, setting the number of copies to print and overriding the default forms.  *Document Operation Printer Settings Printer Tab*

Fax Settings (see page 78)	Fax settings are enabled if you have selected Fax as one of your distribution types in the Document Operations Distribution Tab (see page 66). These settings are used when a document requires faxing. The settings allow you to customise the recipient and sender details of the document.

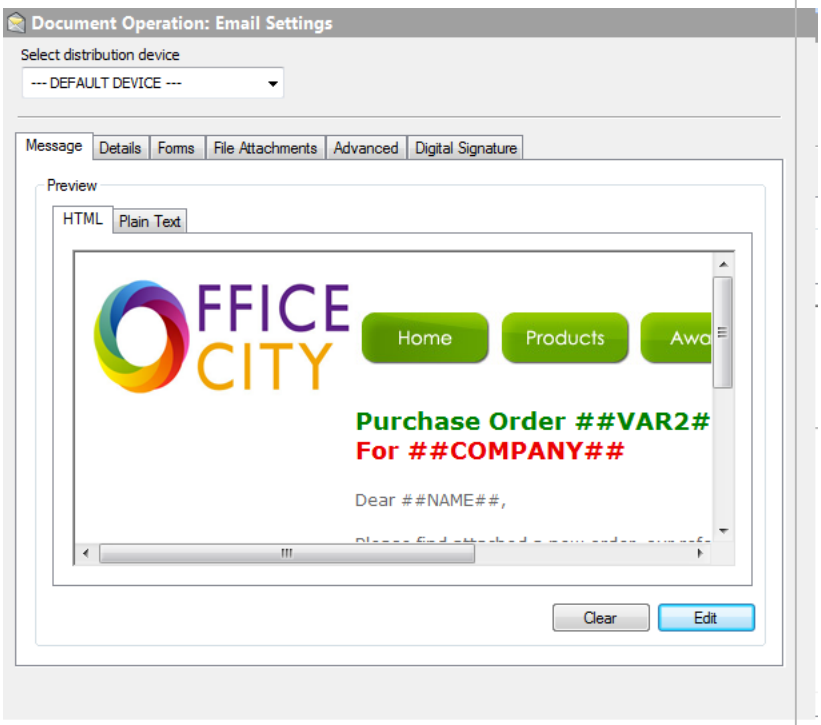


Document Operation Fax Settings Details Tab

Select distribution device

From the drop-down list you can select the distribution device to use for this operation. As standard '---DEFAULT DEVICE---' is selected, which uses the device selected in the User Settings for the current user.

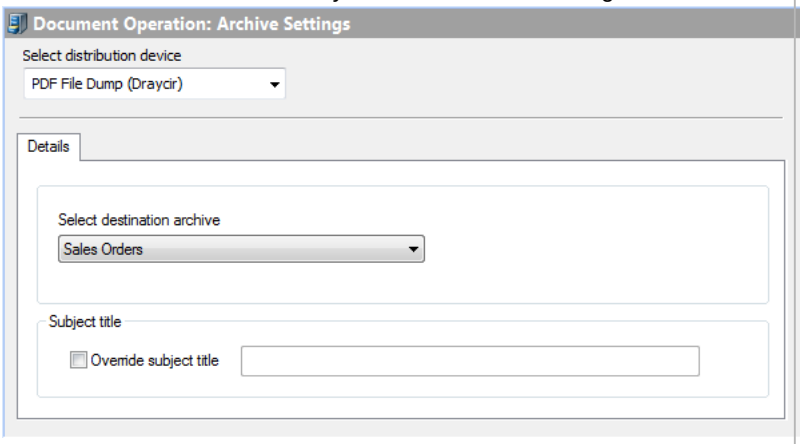
Email Settings (see page 81)	Email settings are enabled if you have selected Email as one of your distribution types in the Document Operations Distribution Tab (see page 66). These settings are used when a document requires emailing. You can configure many options including the email message, customising the recipient and sender details, and adding file attachments.



Document Operation Email Settings Message Tab

Select distribution device

From the drop-down list you can select the distribution device to use for this operation. As standard '---DEFAULT DEVICE---' is selected, which uses the device selected in the User Settings for the current user.

Archive Settings (see page 89)	Archive settings are enabled if you have selected Archive as one of your distribution types in the Document Operations Distribution Tab (see page 66). These settings are used when a document requires archiving and controls which archive entry will be used for archiving.  *Document Operation Archive Settings Details Tab* **Select distribution device** From the drop-down list you can select the distribution device to use for this operation. Unlike the other distribution nodes there is no '---DEFAULT DEVICE---'. The reason why is since each archive entry in the Archive Manager (see page 93) is linked to a particular type of archive, these setting would be incompatible if two... more (see page 89)
CRM Settings (see page 90)	CRM settings are enabled if you have selected CRM as one of your distribution types in the Document Operations Distribution Tab (see page 66). Spindle Document Distribution uses several embedded commands from the document or external data to find the contact in the CRM system. You MUST have a matching person and company name in the CRM system to the recipient of the document. Spindle Document Distribution will first try to match the CRM company with the value found in ##CRMCOMPANY. If this command is empty it will use the value in ##COMPANY instead. Once the company is found Spindle Document Distribution... more (see page 90)

7.2.1 Document Types

A Document Type is the name given to a particular kind of document. It holds all of the settings required by Spindle Document Distribution for distributing documents without asking you any questions. Document types hold one or more Document Operations (see page 61) and there are virtually no limits to the number of document types you can create. Examples of document types include statements, invoices, quotations, picking lists, sales and marketing letters etc. Each document type can have a number of operations performed on it, such as emailing a copy to the customer, printing an internal copy to the warehouse and emailing the sales rep.

Document types are created in Spindle Document Distribution Tools and are linked to particular documents by the embedded command CFG. If you created a document type called 'Invoices' you would placed the following text within your invoice document:

##CFG Invoices##

When you print the document to the Spindle Pro printer or the Spindle Pro Auto printer, it will look for and extract the CFG command. The CFG command links the pages of your document to the name of the document type. Spindle Document Distribution will search the list of document types for one called 'Invoices'. If found, all the operations stored under the

document type 'Invoices' are performed on the document.

Multiple CFG commands

You can have more than one embedded CFG command within a document as long as they are on different pages. This is useful if want to perform different operations on sperate sections of the document. For example, you could be printing a large batch of invoices and credit notes and you may want to use different forms or send a different email message depending on the page type. You can do this by placing ##CFG Invoice## on invoices and ##CFG Credit Note## on credit notes and creating to matching document types.

Page Sorting

Page sorting allows you to re-order the pages within the printed document. Taking our large batch of invoices example again, this feature is very useful as Spindle Document Distribution can sort the pages so they are processed in account number order. Therefore you could easily place invoices going to the same customer in the same envelope, saving time and money on hand sorting and/or postage costs.

7.2.1.1 Creating document types

To create a document type:

1. Launch Spindle Document Distribution Tools and select **Document Automation** from the shortcut bar.
2. In the tree window right-click on the Global Document Types entry and select **New Document Type** from the menu. You can also click the  button from the Document Automation toolbar.
3. A new entry will appear in the tree window called **New Document Type**. Rename the entry, e.g. 'Invoices'.
4. The document type has been created. You can now edit its settings or add document operations.

7.2.1.2 Enable page sorting

Page sorting allows you to re-order the pages within the printed document.

To enable page sorting:

1. Launch Spindle Document Distribution Tools and select **Document Automation** from the shortcut bar.
2. In the tree window click on the required Document Type.
3. In the dialog window tick **Enable sorting**.
4. Select the command you want to sort the pages by in the **Sort by** drop-down list.
5. In the following drop-down list select either the **Ascending** or **Descending** option.
6. The Description box will now be enabled in the dialog window. Enter a description for this profile, e.g. 'This is the accounts department laser printer'.
7. The profile has been created. You will now need to get all users to map the profile to the desired printer. See Mapping a Printer Profile to a user.

7.2.1.3 Deleting document types

Deleting a document type will remove all of its document operations and settings.

To delete a document type:

1. Launch Spindle Document Distribution Tools and select **Document Automation** from the shortcut bar.
2. In the tree window right-click on the document type you want to delete and select **Delete Document Type** from the menu. You can also click the  button from the Document Automation toolbar.
3. A dialog box will appear asking you to confirm that you want to delete the document type. Click **Yes**.

4. The document type will be removed from the list.

7.2.1.4 Renaming document types

When renaming a document type you will need to update any ##CFG commands you have on your documents and reports.

To rename a document type:

1. Launch Spindle Document Distribution Tools and select **Document Automation** from the shortcut bar.
2. In the tree window right-click on the document type you want to rename and select **Rename Document Type** from the menu. You can also click the  button from the Document Automation toolbar.
3. The document type name in the tree window becomes highlighted.
4. Type in the new name of the document type and press return.
5. The document type has now been renamed.

or

1. Launch Spindle Document Distribution Tools and select **Document Automation** from the shortcut bar.
2. In the tree window left-click on the document type you want to rename.
3. In the dialog window type in the new name of the document type in the **Document type name** edit box.
4. As soon as the edit window loses focus the document type is renamed.

7.2.1.5 Copying document types

Copying a document type copies all of its document operations and settings.

To copy a document type:

1. Launch Spindle Document Distribution Tools and select **Document Automation** from the shortcut bar.
2. In the tree window right-click on the document type you want to copy and select **Copy Document Type** from the menu. You can also click the  button from the Document Automation toolbar.
3. A new document type is created with the name' Copy of *X'*, where *X* is the name of the copied document type.

7.2.2 Document Operations

A Document Operation holds a set of rules to perform a particular task on a document. It will process all of the pages, applying the Document Settings as it goes. A Document Type can contain a number of document operations, with each operation performing a specific task. For example, our document type 'Invoices' could have the following document operations:

- **Send copy to the customer** (Emails or faxes a copy invoice to the customer. Adds our invoice form design and another form stating 'COPY').
- **Print main copy for customer** (Prints the invoice to office colour laser with our form design. We post this out to the customer with the goods they've ordered).
- **Email management high orders** (Emails management a copy of the invoice if the order exceeds £3,000.00).
- **Archive into SharePoint** (Archives a copy of the invoice into SharePoint for later searching and retrieval).

It is good practise to use the operation name to describe what the operation is intended to achieve. E.g. 'Send a copy to my customers', 'Email the warehouse manager', 'Print a hard copy' etc.

Document Operation icon states

The icon of a document operation will change in the tree view window depending on which one of three states it is in:

Icon	Description
	The operation is enabled and does not have criteria checking.
	The operation is enabled and has criteria checking.
	The operation is disabled.

7.2.2.1 Creating document operations

Document operations can only be created under a document type.

To create a document operation:

1. Launch Spindle Document Distribution Tools and select **Document Automation** from the shortcut bar.
2. In the tree window right-click on the Document Type entry you want to add an operation to and select **New Document Operation** from the menu. You can also click the  button from the Document Automation toolbar.
3. A new entry will appear in the tree window called **New Document Operation**. Rename the entry, e.g. 'Send copy to customer via email or fax'.
4. The document operation has been created. You can now edit its settings.

7.2.2.2 Deleting document operations

Deleting a document operation will remove all of its settings.

To delete a document operation:

1. Launch Spindle Document Distribution Tools and select **Document Automation** from the shortcut bar.
2. In the tree window right-click on the document operation you want to delete and select **Delete Document Operation** from the menu. You can also click the  button from the Document Automation toolbar.
3. A dialog box will appear asking you to confirm that you want to delete the document operation. Click **Yes**.
4. The document operation will be removed from the list.

7.2.2.3 Renaming document operations

To rename a document operation:

1. Launch Spindle Document Distribution Tools and select **Document Automation** from the shortcut bar.
2. In the tree window right-click on the document operation you want to rename and select **Rename Document Operation** from the menu. You can also click the  button from the Document Automation toolbar.
3. The document operation name in the tree window becomes highlighted.
4. Type in the new name of the document operation and press return.
5. The document operation has now been renamed.

or

1. Launch Spindle Document Distribution Tools and select **Document Automation** from the shortcut bar.
2. In the tree window left-click on the document operation you want to rename.
3. In the dialog window type in the new name of the document operation in the **Operation** edit box.

4. As soon as the edit window loses focus the document operation is renamed.

7.2.2.4 Copying document operations

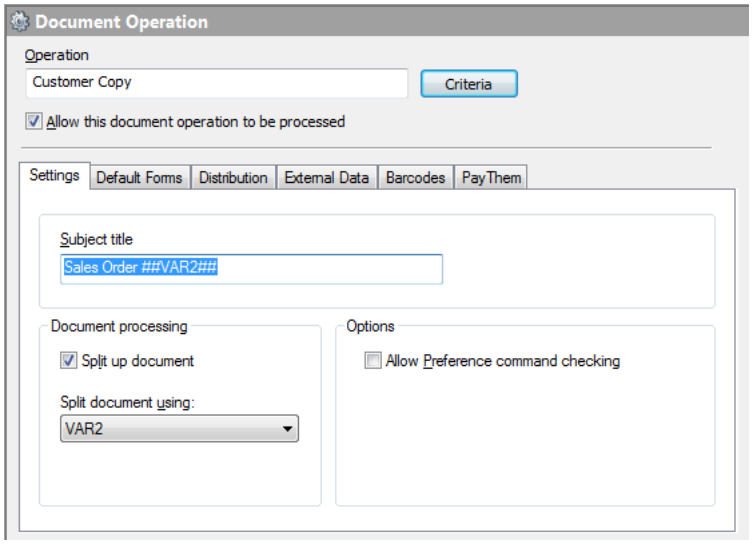
Copying a document operation will create a copy of the document operation in the same document type.

To copy a document operation:

1. Launch Spindle Document Distribution Tools and select **Document Automation** from the shortcut bar.
2. In the tree window right-click on the document operation you want to copy and select **Copy Document Operation** from the menu. You can also click the button from the Document Automation toolbar.
3. A new document operation is created with the name' Copy of *X'*, where *X* is the name of the copied document operation.

7.2.2.5 Settings Tab

The Settings tabs contains the basic settings for a document operation.



Document Operation Settings

Operation

The name of your operation. Use it to describe what the operation is doing or where the document is going.

Allow this document operation to be processed

This enables or disables this operation. When a document operation is first created by default this option is on. To temporarily disable an operation without deleting it, tick this option.

Criteria

See the Criteria section for more information.

Subject title

This becomes the subject line of an email and of a fax, or the name of the job in a printer queue, depending on how the document is distributed. The subject title can be personalised using the ## commands. For example, entering the text 'Sales Order ##VAR2## for ##COMPANY##' would become 'Sales Order 0000054325 for ABC Joiners Ltd' when distributed. See Command Reference for a full list of available commands.

Split up document

Tick this option to split the document pages up for different recipients. The value in the split variable (see below) is used to tell Spindle Document Distribution when the recipient of a document has changed. Each time the value of the command changes, Spindle Document Distribution will treat the following pages as a new document, with a potential different recipient. The previous pages are distributed before Spindle Document Distribution starts the process again with the following pages.

Split document using

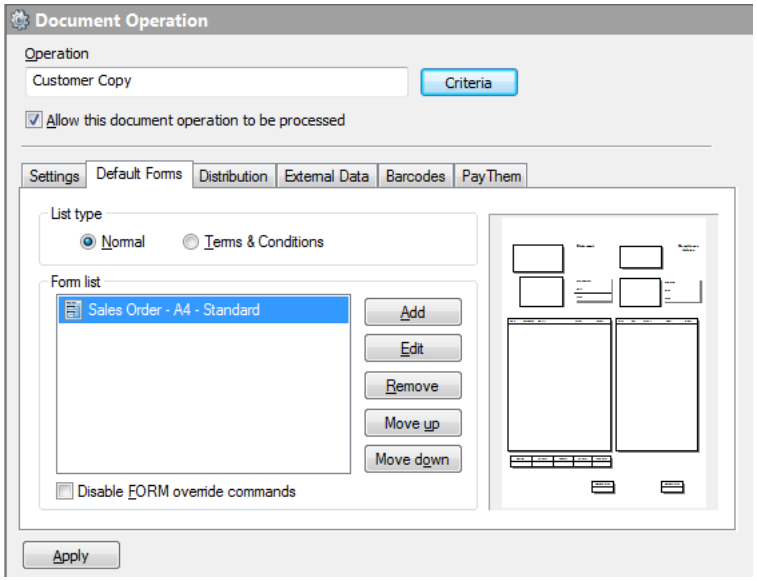
Selects the command to use as the split variable. For example, when printing a batch of invoices you would split using the invoice number. If the invoice number is held in the command VAR2 (see page 246) then select VAR2 (see page 246) from the list. Every time VAR2 (see page 246) changes, the previous pages are distributed, and the remaining pages treated as a new document.

Allow Preference command checking

The PREF command can be used to tell Spindle Document Distribution the preferred method a company wants to receive a document. The PREF command overrides the distribution order set in the Distribution tab (see page 66). Tick this option to allow this operation to check the preferences set in the PREF command. If the option is not ticked, the distribution order on the distribution tab is used. See the PREF (see page 239) command for more information.

7.2.2.6 Default Forms Tab

The Default forms tab contains the normal and terms and conditions forms that will be used by this operation. These default forms can be overridden in the Printer Settings (see page 74), Email Settings (see page 81) and Fax Settings (see page 78).



Document Operation Default Forms

List type

This controls the type of forms list you want to edit. In a document operation there are two types of form lists available; Normal and Terms & Conditions.

Normal

Normal forms are applied to each page of your document. A number of forms can be used to build up the finished design. The forms are applied in layers with the first in the list being placed on the bottom, the next form on top of that and so on. When adding a form to the list you can decide if the form should be place underneath the document page or placed on top of the document page. Placing a form underneath the document allows you to have watermark features. Placing a form on top

of the document allows you to hide or mask parts of the original document.

Terms & Conditions

These forms are added on to the end of your document. Terms & Conditions forms contain any information that needs to go with the document, and not just your terms and conditions. For example, you could send directions to your company or a venue, monthly special offers, opening times over a holiday period etc. These types of forms can contain multiple pages.

Disable form override commands

The FORM and OVERFORM commands can be used to dynamically tell Spindle Document Distribution which form should be applied to the current page, which overrides the selected forms in the list. However, ticking this option disables the FORM and OVERFORM commands and uses the forms supplied in the list instead.

Form list icon states

The icon of a form in the list can be one of four states:

Icon	Description
	Form is added before the page data
	Form is added after the page data
	Form is added before the page data and has criteria checking
	Form is added after the page data and has criteria checking

Criteria

Criteria enables logic to be applied to the selected form. The logic tells Spindle Document Distribution whether the selected form should or should not be applied to the document. For example if a form contains the word ‘OVERDUE’ and the command VAR2 contains the value 1 (i.e. the account is overdue) then the form will be applied.

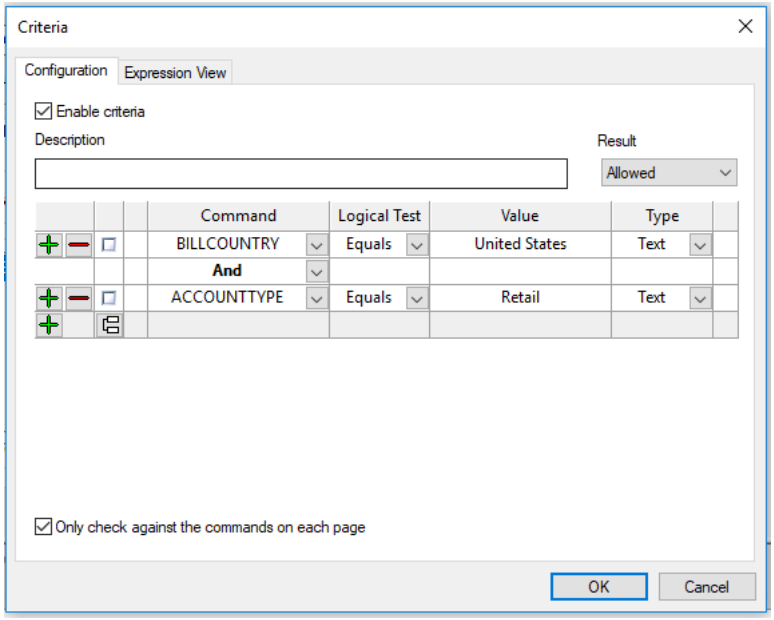
Criteria can be used to great effect by companies that use multiple logos, addresses, contact details etc.. Instead of creating a separate form for each design where most the design is the same, the use of criteria enables the creation of smaller forms each being applied only when needed.

‘Print this form over the pages data instead of behind’

Normal forms can be placed underneath or on top of your document. Any part of the form that appears over the top of any other form or the document will hide or mask the information/design underneath. Forms printed on top of the document are highlighted in ‘Red’ in the forms list.

Use criteria for different forms

A user can create a form with e.g new payment details on it. Then use criteria to determine if the form is added to the document or not

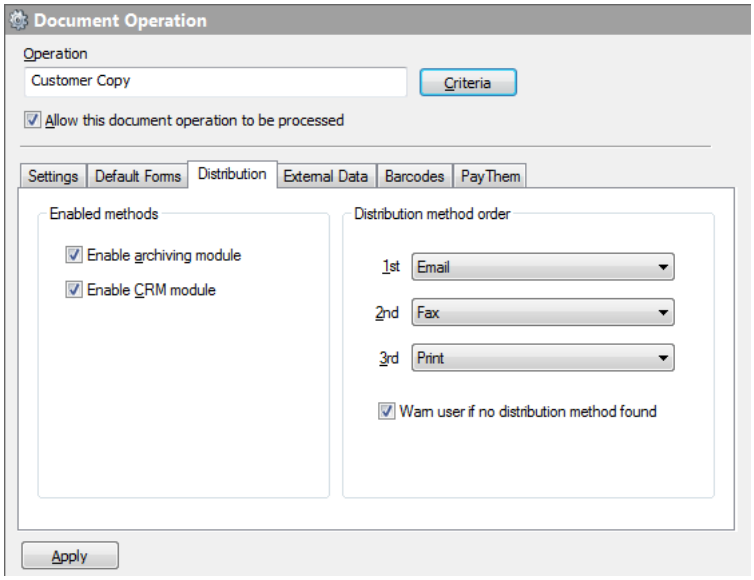


Ticking the box at the bottom of the criteria table ensures the commands are checked on each page of the document.

If the box is not ticked the conditions will be checked on the first page and applied on all subsequent pages of the document.

7.2.2.7 Distribution Tab

The Distribution tab sets the methods by which Spindle Document Distribution will send out the documents for this operation.



Document Operation Distribution

Enable archiving module

Tick this option if you want to archive this document. See Archiving Settings (see page 89) for configuration options.

Enable CRM module

Tick this option if you want to update your CRM system during this operation. See CRM Settings (see page 90) for configuration options.

Distribution method order

The method order determines the priority of delivering a document by one method over that of another. There are four options available:

- Email
- Fax
- Print
- None

The methods Email and Fax are optional and require the use of the ##EMAIL and ##FAX commands. To deliver the document primarily using Email select 1st as Email, this way Spindle Document Distribution will check for the ##EMAIL command. If there is information in the ##EMAIL command then the document will be emailed to that recipient. If the ##EMAIL command is empty Spindle Document Distribution will progress to the 2nd method.

The most cost effective method of delivering a document is by Email, next is Fax and lastly is Print. Therefore it is common to have 1st as Email, 2nd as Fax and 3rd as Print.

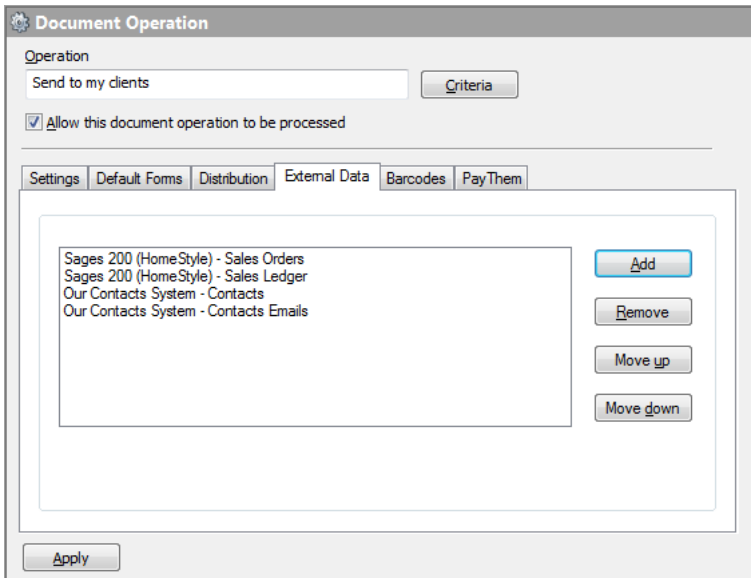
Not all three methods need to be used. If Spindle Document Distribution gets to a method set to '<NONE>', the document will not be delivered to any recipient. This can be useful if a document is printed but you also want to email it to someone only if they have an email address. In this scenario you would have two document operations; one to perform the printing and the other to do emailing.

Warn user if no distribution method found

During processing if no method is found to distribute the document, Spindle Document Distribution will warn the user. However, sometimes not finding a method could be valid. To stop Spindle Document Distribution displaying this warning un-tick this option.

7.2.2.8 External Data Tab

External Data is used to retrieve information from databases. Spindle Document Distribution can access information from a large number of databases using OLEDB technology.



Document Operation External Data

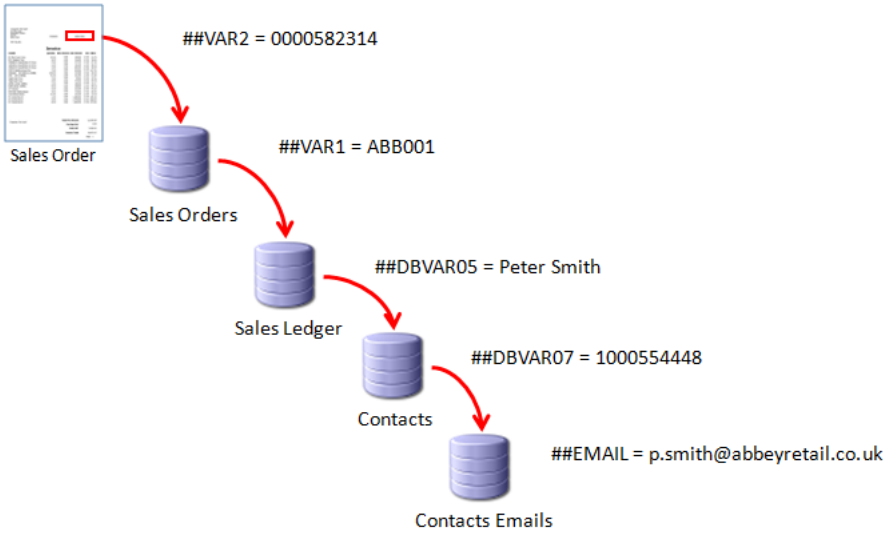
Button descriptions

- **Add -** Allows you to add a data link to use in this document operation.

- **Remove -** Removes the selected data link from the list.
- **Move up -** Moves the selected data link up the list.
- **Move down -** Moves the selected data link down the list.

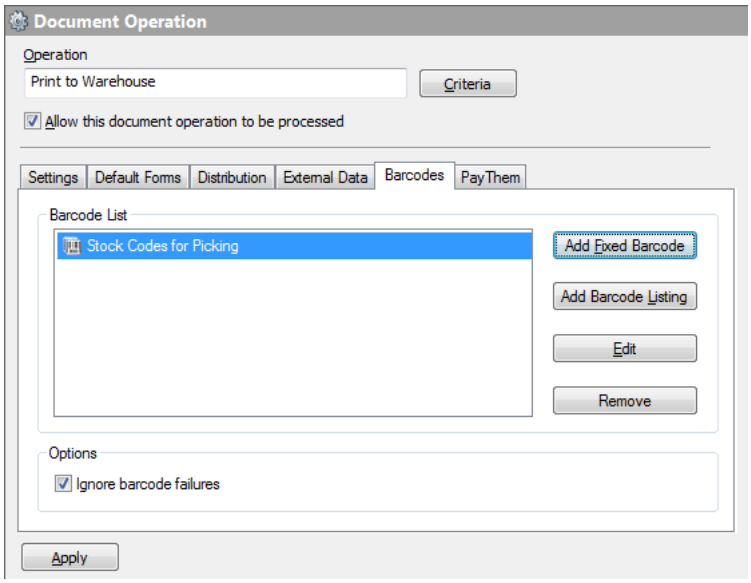
Any number of data links can be used and their position in the list is very important as you can use information taken from one database to lookup a record in another database. For example, if data link A requires information gathered by data link B then data link B needs to appear in the list before data link A. Take the following example:

1. We extract **##VAR2** from the document page which contains the **Sales Order Number**.
2. The **Sales Order Number (##VAR2)** is used to find the **Sales Order record** from the **Sales Order database**.
3. From the **Sales Order record** we extract the **Customer Account Number** and store it in **##VAR1**.
4. The **Customer Account Number (##VAR1)** is used to find the **Customer Account record** from the **Sales Ledger database**.
5. From the **Sales Ledger database** we extract the **Contact Name** and store it **##DBVAR05**.
6. The **Contact Name (##DBVAR05)** is used to find the **Contact record** from the **Contacts database**.
7. From the **Contacts database** we extract the **Contacts Email Record Id** and store it in **##DBVAR07**.
8. The **Contacts Email Record Id (##DBVAR07)** is used to find the **Contacts Email record** from the **Contacts Emails database**.
9. Finally we extract the contacts email address from this record and store it in **##EMAIL**.



7.2.2.9 Barcodes Tab

This section enables you to add *fixed barcodes* or *listing barcodes* to the output document. To use this feature you must have created a barcode design using the Barcode Designer (see page 135).



Document Operation Barcodes

Fixed barcodes

These type of barcodes appear once on a document at a fixed location. Fixed barcodes are used to encode single item information such as an invoice number, delivery note number or special offer item.

Listing barcodes

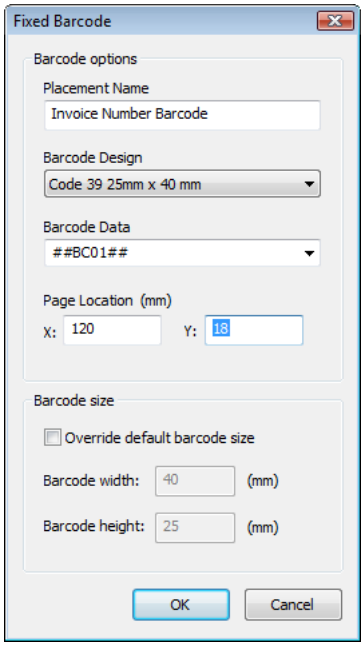
Listing barcodes appear a variable number of times in a document. They are normally used for stock item lines where the number of barcodes will vary in quantity and are used in documents such as picking lists, items on delivery notes etc.

Listing barcodes require the use of specialist commands, ##BC01## to ##BC30##. Normal commands can only be used once per page and if subsequent copies are found on the page they are ignored. However, all instances of each BCxx command are remembered and can be used in sequence. See Adding a listing barcode (see page 71) for more information.

Ignore barcode failures

By default if Spindle Document Distribution fails to create a valid barcode from the data given to it, an error will be displayed and the processing terminated. Ticking this option will still log the error but will enable Spindle Document Distribution to continue processing the remainder of the document.

7.2.2.9.1 Adding a fixed barcode



Placement name

Used to describe what the barcode is encoding, e.g. invoice number, delivery note number etc. This is only used as a description for this barcode entry.

Barcode Design

A drop-down list which allows you to select the barcode design to be generated. Barcode designs are created in the Barcode Designer (see page 135), more information can be found in that section.

Barcode Data

This is the data that is to be encoded into the barcode. You can either select a ##BC command from the drop-down list or type in the information directly. This data can be a combination of commands and directly typed text. Valid entries include:

- ##BC01##
- ##VAR1##
- Postcode##VAR3##
- ##COMPANY##-##BC03##

Page Location (mm)

The location on the page where the barcode will be created and is measured in millimetres. X specifies the horizontal position with 0 starting from the left hand side of the page. Y specifies the vertical position with 0 starting from the top of the page. For an A4 portrait page a position of 0,0 would be the top-left of the page and a position of 210,297 would be the bottom-right of the page.

Override default barcode size

The default size of the barcode is set in the Barcode Designer (see page 135) but can be overridden by ticking this option. This will enable the Barcode width and Barcode height controls. The measurement units will either be millimetres (mm) or inches (in) depending on the measurement units used in the original barcode design.

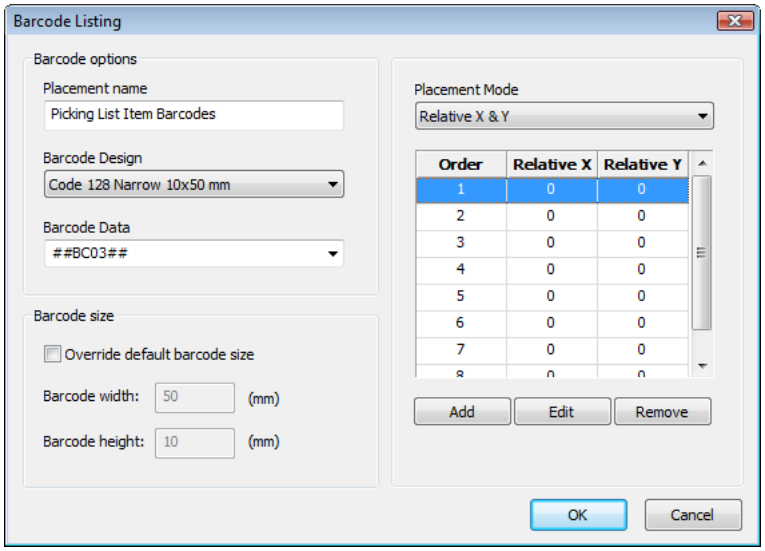
Barcode width:

Specifies the width of the barcode to create. This control is only enabled if 'Override default barcode size' is ticked.

Barcode height:

Specifies the height of the barcode to create. This control is only enabled if 'Override default barcode size' is ticked.

7.2.2.9.2 Adding a listing barcode



Placement name

Used to describe what the barcode is encoding, e.g. stock item number, serial number, batch number etc. This is only used as a description for this barcode entry.

Barcode Design

A drop-down list which allows you to select the barcode design to be generated. Barcode designs are created in the Barcode Designer (see page 135), more information can be found in that section.

Barcode Data

This is the data that is to be encoded into the barcode. You have to select one of the ##BC commands from the drop-down. Once selected you can combine it with other commands or directly typed text. You have to select a ##BC command as Barcode Listing uses the position of the command found on the page as a reference to where it will draw the barcode.

Override default barcode size

The default size of the barcode is set in the Barcode Designer (see page 135) but can be overridden by ticking this option. This will enable the Barcode width and Barcode height controls. The measurement units will either be millimetres (mm) or inches (in) depending on the measurement units used in the original barcode design.

Barcode width:

Specifies the width of the barcode to create. This control is only enabled if 'Override default barcode size' is ticked.

Barcode height:

Specifies the height of the barcode to create. This control is only enabled if 'Override default barcode size' is ticked.

The Placement Mode grid allows the moving of barcodes in relation to where the ##BC command appeared. It also allows you to set the maximum number of barcodes that will be generated on one page. You will need to add as many entries to the grid to match the maximum number of lines that could be printed on the document. I.e. if the document could list a maximum of 7 items then 7 rows should appear in the grid.

Depending on the report/document designer being used it may not always be possible to place the ##BC command in the place that you want them printed. The grid ensures that barcodes can be placed in the correct position on the page. Use positive numbers to move barcode locations down or to the right and negative numbers to move a barcode up or to the left.

Placement Mode

Sets the way in which the location of the barcode is determined. Depending on this setting, the location of each barcode is taken from where the ##BC command appears on the document or from the absolute location specified in the grid.

Relative X

The X location of where the ##BC command appeared on the document is used as the base X location for the generated barcode. The absolute Y location is taken from the grid entry.

Relative Y

The Y location of where the ##BC command appeared on the document is used as the base Y location for the generated barcode. The absolute C location is taken from the grid entry.

Relative X & Y

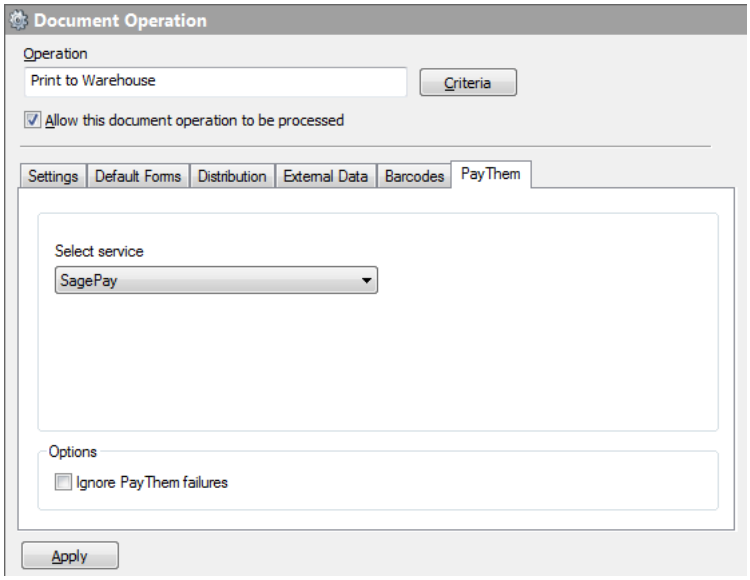
Both the X and Y location of where the ##BC command appeared on the document is used as the base location for the barcode.

Absolute

The exact location values are taken from the grid entry.

7.2.2.10 PayThem Tab

This section enables you to add a PayThem service to be used with your Document Operation, allowing you to add 'Pay Now' buttons on your PDF documents or payment links on your email body. To use this feature you must have created a PayThem service using the Integration Manager (see page 141).



Document Operation PayThem

If your operation will be generating a PDF document (i.e. Email or Archive operations) then you are now able to add a 'Pay Now' button onto your outbound PDF documents. For example, you can now send out Sales Invoices to your customers and place 'Pay Now' buttons onto them. When customers receive the invoice, they can simply click on the button to make a payment. Alternatively, you can add a payment link on your email body. Upon clicking the button or payment link, the

customer will be taken to a payment page where they will be able to check the amount, and enter their payment details. In order to use this service, you will need to have a vendor account created with a supported payment provider, and must have this account set up against the PayThem service you create in Integration Manager (see page 141).

Select service

Select the PayThem service that you would like to use on the Document Operation. All PayThem services that you have created in Integration Manager will appear in this drop down.

Ignore PayThem failures

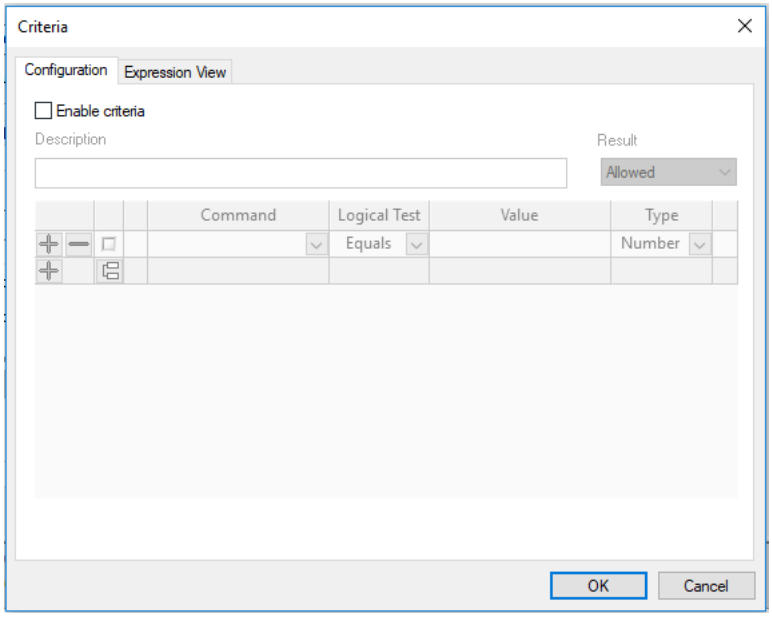
By default during processing, if the validation checks fail, an error will be displayed and the processing terminated. Tick this box if you would like the distribution to continue if PayThem errors are detected. **Note**: Ticking this option will mean that the documents are distributed without 'Pay Now' buttons and/or emails are sent without payment links.

7.2.2.11 Criteria

Criteria can be used at both the Document Operation level and at the Default Form level. At the Operation level it determines what documents are sent to specific people and at the Form level what additional information is added to the document if required.

Form level criteria is described here (see page 64)

The Criteria table looks like this when you first open it:



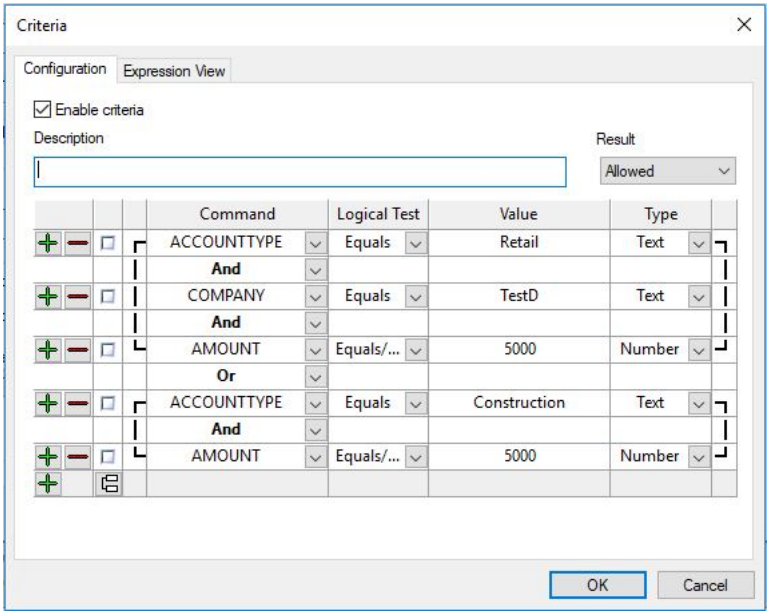
Once you enable Criteria you can add multiple conditions (as represented by the rows) and you can also put multiple conditions into groups.

To add more columns click the plus icon - you can add conditions consecutively and also add them in between existing conditions. To remove columns click the minus icon - if you try to remove a condition that has a value in it you will get a pop-up asking you to confirm.

If you want to group a set of conditions together, tick each box that is against the condition you want to group and then click the grouping icon.

A grouped set of conditions.

Here is a possible Criteria set up to correctly distribute documents to an account manager. They are the account manager of some retail companies and all construction companies and need to get copies of documents with a value of 5000 or more

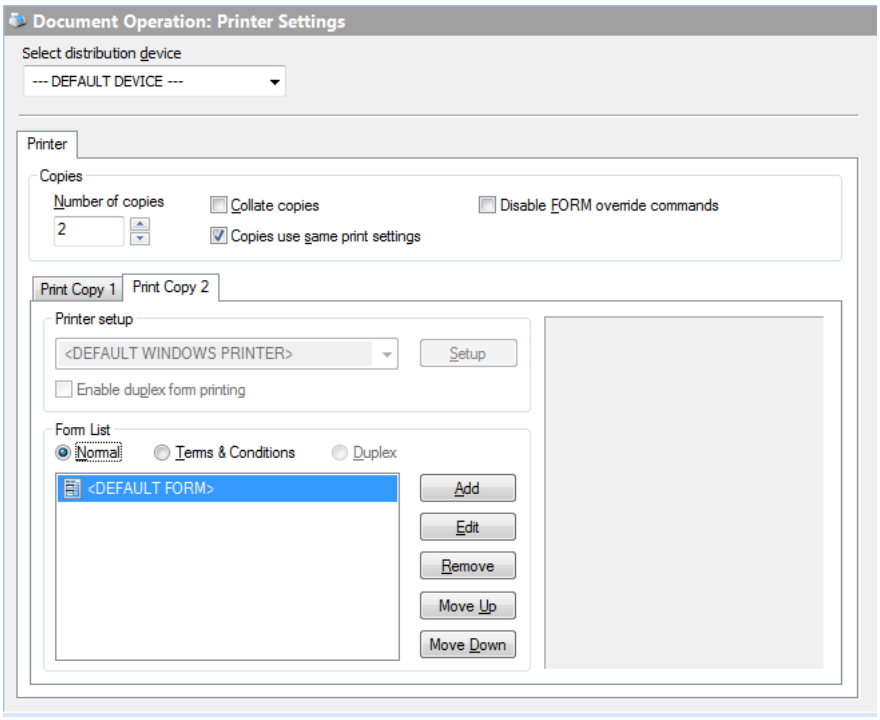


The brackets indicate the separate conditions that have been grouped so they can be evaluated together. The first group is checking on the document that the account type is Retail, the Company is TestD and the Value is equal or more than 5000. The second group is checking on the document that the account type is Construction and the value is equal or more than 5000. Because there is an OR command between the groups then if either of these groupings are true the document will be distributed to the account manager

7.2.3 Document Settings

7.2.3.1 Printer Settings

Printer settings are enabled if you have selected Print as one of your distribution types in the Document Operations Distribution Tab (see page 66). These settings are used when a document requires printing. The settings you can change in this section include selecting the destination printer, setting the number of copies to print and overriding the default forms.



Document Operation Printer Settings Printer Tab

Select distribution device

From the drop-down list you can select the distribution device to use for this operation. As standard '---DEFAULT DEVICE---' is selected, which uses the device selected in the User Settings for the current user. **Note:** there is only one type of printer device available, the Standard Printer.

Number of copies

Sets the number of copies to print. Entering more than 1 in the Number of copies area will create a corresponding number of Print Copy tabs. Multiple tabs provide the facility to configure Spindle Document Distribution to handle many aspects of each printed copy of the document differently. As well as having a different arrangement of back drop forms, each copy can go to a different bin in a printer or to another printer. The maximum number of copies is 100.

Collate copies

Tick this option to collate the pages together if you have set the number of copies to greater than 1.

Copies use the same printer settings

Uncheck this option to allow the selection and configuration of a different printer for each copy.

Disable form override commands

The FORM command can be used to dynamically tell Spindle Document Distribution which form should be applied to the current page, which overrides the selected forms in the list. However, ticking this option disables the FORM command and uses the forms supplied in the list instead. This option is only checked if you have overridden the forms, i.e. you have not selected <DEFAULT FORM>.

Select printer

Selects the destination printer to use. There are four different types of printers available:

- **<DEFAULT WINDOWS PRINTER>** - Uses the default printer of the computer that printed the document.
- **<DEFAULT SPINDLE PRINTER>** - The printer the user has selected in the User Settings of Spindle Document Distribution Tools.

- **Printer Profile** - A virtual printer created within Spindle Document Distribution. See Printer Profiles (see page 147) for more information.
- **Installed Printer Driver** - A printer driver installed on the computer. If this option is selected then this printer driver must be available on the computers of all users who will use this document operation.

Setup

When selecting an installed printer driver the Setup button enables you to configure the settings for the printer. These settings are stored in the Spindle Document Distribution database so anyone using this operation will achieve the same results. However, only the standard printer driver settings are stored, such as portrait/landscape, paper tray, paper size, duplex settings, etc. This option does not store custom printer driver settings that are available on some models of printers. If you need to use these custom settings then you will need to create a Printer Profile (see page 147).

Enable duplex form printing

Tick this option to enable the Duplex function when processing documents. When this option is enabled Spindle Document Distribution will insert a page in between each printed document page. This inserted page can contain forms, taken from the Duplex forms list on the forms tab. This setting does not enable the duplex feature on the printer. You will also need to tick the duplex option in the printer settings.

Note: Duplex form printing requires a duplex printer!

Form List

This controls the type of forms list you want to edit. There are two types of form lists available; Normal and Terms & Conditions.

Normal

Normal forms are applied to each page of your document. A number of forms can be used to build up the finished design. The forms are applied in layers with the first in the list being placed on the bottom, the next form on top of that and so on. When adding a form to the list you can decide if the form should be placed underneath the document page or placed on top of the document page. Placing a form underneath the document allows you to have watermark features. Placing a form on top of the document allows you to hide or mask parts of the original document.

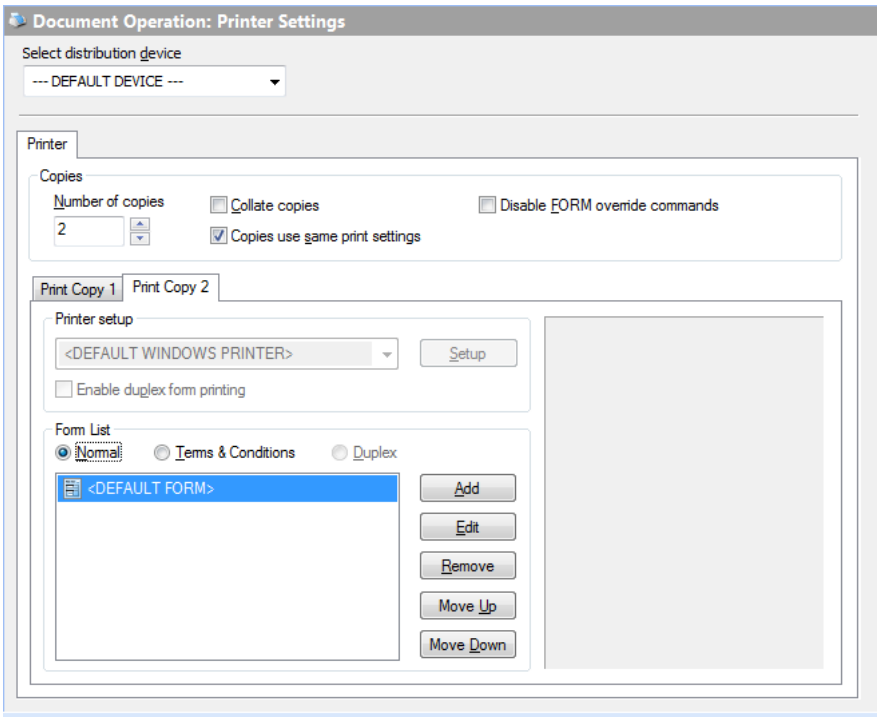
Terms & Conditions

These forms are added on to the end of your document. Terms & Conditions forms contain any information that needs to go with the document, and not just your terms and conditions. For example, you could send directions to your company or a venue, monthly special offers, opening times over a holiday period etc. These types of forms can contain multiple pages.

7.2.3.1.1 Forms

When Spindle Document Distribution distributes a document to a printer it will use the forms specified in the Default Forms (see page 64) tab of the document operation. The Form List section in Printer Settings can override those forms. One example why you may want to override a form could be the default form is in full colour and you are printing to a mono laser. You could specify a simpler black and white form which looks better when printed in mono and uses less toner than the full colour backdrop form, which is used for emailing and archiving.

You can also use this section to configure any duplex form you want to use and to specify the forms if you are printing more than one copy of the document.



Document Operation Printer Settings Forms Section

Print copy

If you are printing more than 1 copy of the document (see Printer Settings (see page 74)) each copy can have its own set of forms. Use the Print Copy tab to set the print copy forms list to edit. Form example, select 'Print copy 1' to edit the forms for the first copy, 'Print copy 2' to edit the forms for the second copy, etc.

List type

This controls the type of forms list you want to edit. There are three types of form lists available; Normal, Terms & Conditions and Duplex.

Normal

Normal forms are applied to each page of your document. A number of forms can be used to build up the finished design. The forms are applied in layers with the first in the list being placed on the bottom, the next form on top of that and so on. When adding a form to the list you can decide if the form should be placed underneath the document page or placed on top of the document page. Placing a form underneath the document allows you to have watermark features. Placing a form on top of the document allows you to hide or mask parts of the original document.

Terms & Conditions

These forms are added on to the end of your document. Terms & Conditions forms contain any information that needs to go with the document, and not just your terms and conditions. For example, you could send directions to your company or a venue, monthly special offers, opening times over a holiday period etc. These types of forms can contain multiple pages.

Duplex

This option is only enabled if you have ticked **Enable duplex form printing** on the Printer Settings (see page 74) tab. If enabled Spindle Document Distribution will insert a blank page in between each printed document page. The forms contained in this list are applied to this page. This feature is useful if you want to apply your terms and conditions on the back of every page you print. In this scenario you would have no need to use the Terms & Conditions form list.

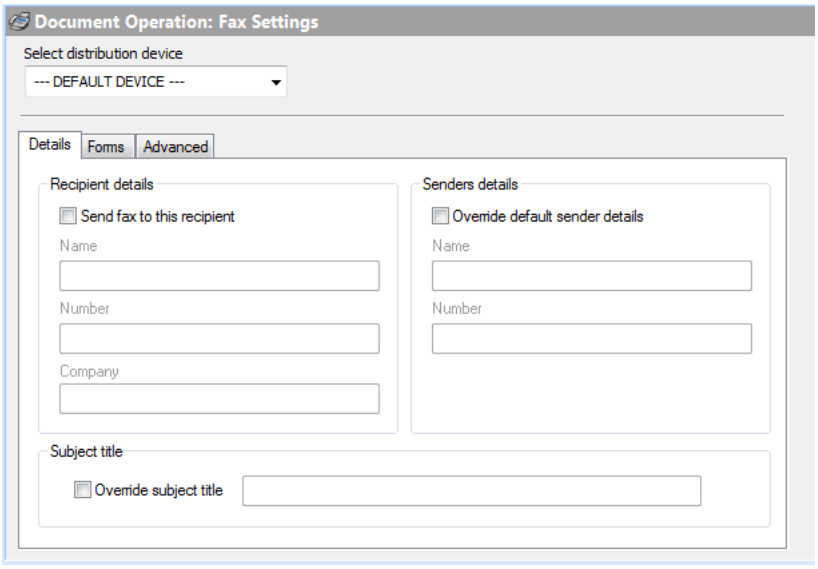
Disable form override commands

The FORM command can be used to dynamically tell Spindle Document Distribution which form should be applied to the current page, which overrides the selected forms in the list. However, ticking this option disables the FORM command and

uses the forms supplied in the list instead. This option is only checked if you have overridden the forms, i.e. you have not selected <DEFAULT FORM>.

7.2.3.2 Fax Settings

Fax settings are enabled if you have selected Fax as one of your distribution types in the Document Operations Distribution Tab (see page 66). These settings are used when a document requires faxing. The settings allow you to customise the recipient and sender details of the document.



Document Operation Fax Settings Details Tab

Select distribution device

From the drop-down list you can select the distribution device to use for this operation. As standard '---DEFAULT DEVICE---' is selected, which uses the device selected in the User Settings for the current user.

Recipient details

Send fax to this recipient

Tick this option if the document is intended to be sent to one person and is not being split up by Spindle Document Distribution. This will allow you to enter the recipients details in the controls below. You do not need to enable this setting if you are getting the recipient fax number and details from the embedded commands ##FAX, ##NAME and ##COMPANY.

Name

The name of the recipient. Only used if you want to send the document to a specific person.

Number

The fax number of the recipient. Only used if you want to send the document to a specific person.

Company

The company name of the recipient. Only used if you want to send the document to a specific person.

Senders details

Override default sender details

If supported by your fax solution tick this option to enable overriding the senders name and fax number. These details appear on the fax header. This option is not supported by all faxing software.

Name

The name of the sender. Only available if 'Override default sender details' is ticked and supported by the fax solution.

Number

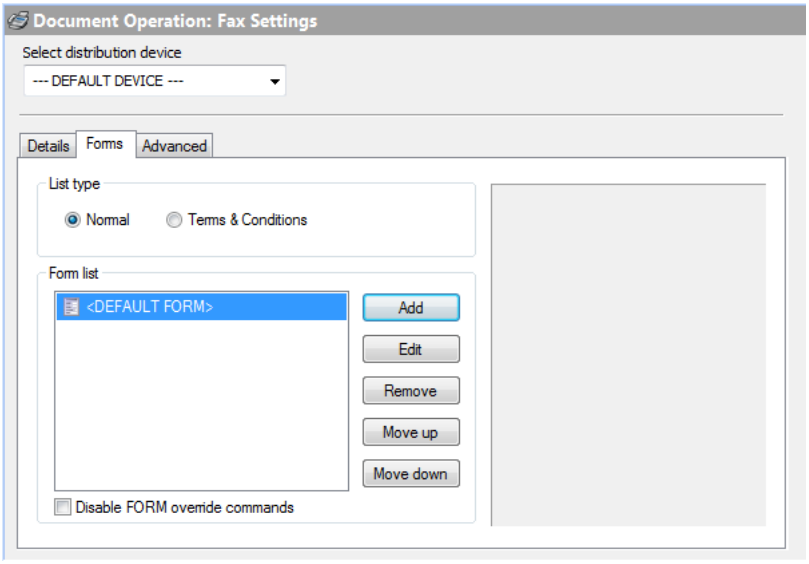
The fax number of the sender. Only available if 'Override default sender details' is ticked and supported by the fax solution.

Override subject title

The default subject title of the fax is taken from 'Subject title' in the document operation settings. You can override the title by ticking this box and entering the new title in the edit control. You can personalise the title using the ## commands.

7.2.3.2.1 Forms Tab

When Spindle Document Distribution distributes a document to a fax device it will use the forms specified in the Default Forms tab (see page 64) on the document operation. The Forms tab in Fax Settings can override these forms.



Document Operation Fax Settings Form Tab

List type

This controls the type of forms list you want to edit. There are two types of form lists available; Normal and Terms & Conditions.

Normal

Normal forms are applied to each page of your document. A number of forms can be used to build up the finished design. The forms are applied in layers with the first in the list being placed on the bottom, the next form on top of that and so on. When adding a form to the list you can decide if the form should be placed underneath the document page or placed on top of the document page. Placing a form underneath the document allows you to have watermark features. Placing a form on top of the document allows you to hide or mask parts of the original document.

Terms & Conditions

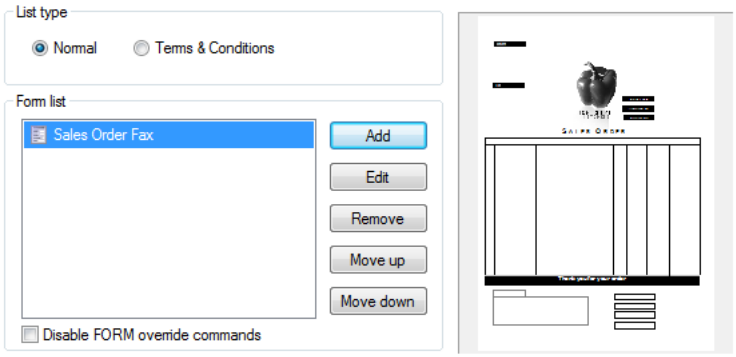
These forms are added on to the end of your document. Terms & Conditions forms contain any information that needs to go with the document, and not just your terms and conditions. For example, you could send directions to your company or a venue, monthly special offers, opening times over a holiday period etc. These types of forms can contain multiple pages.

Disable form override commands

The FORM command can be used to dynamically tell Spindle Document Distribution which form should be applied to the current page, which overrides the selected forms in the list. However, ticking this option disables the FORM command and uses the forms supplied in the list instead. This option is only checked if you have overridden the forms, i.e. you have not selected <DEFAULT FORM>.

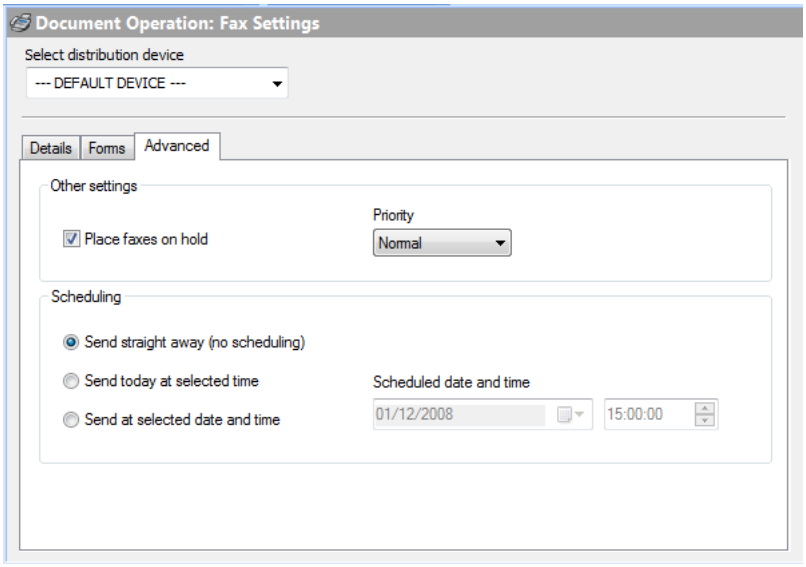
Example

An example of why you would override a form would be the default form is in full colour which looks good when emailing and printing but becomes unreadable when faxing. It is better to have a simple form for faxing as they are easier to read and more complex forms take longer to fax, costing you more money.



7.2.3.2.2 Advanced Tab

This tab allows you configure any advanced faxing settings for this operation.



Document Operation Fax Settings Advanced Tab

Place faxes on hold

This option will prevent a fax from being sent out. Faxes will be queued by in the faxing software until a user releases them.

Priority

Faxes can be sent using one of three levels of importance Low, Normal and High. The faxing software will use this value to determine where the fax will be placed in the outgoing queue.

Scheduling

Allows a user to specify the date and time for a fax to be transmitted. One of the benefits of scheduling is that it allows you to make significant cost savings by transmitting faxes at non-peak times, such as in the evening.

Send straight away (no scheduling)

This is the default option. No scheduling takes place and faxes are sent out straight away.

Send today at selected time

Schedules the fax to be sent at the time specified, on the same day the document is submitted. Because no date is selected, this option can be used to send faxes, for example, on the evening of each day.

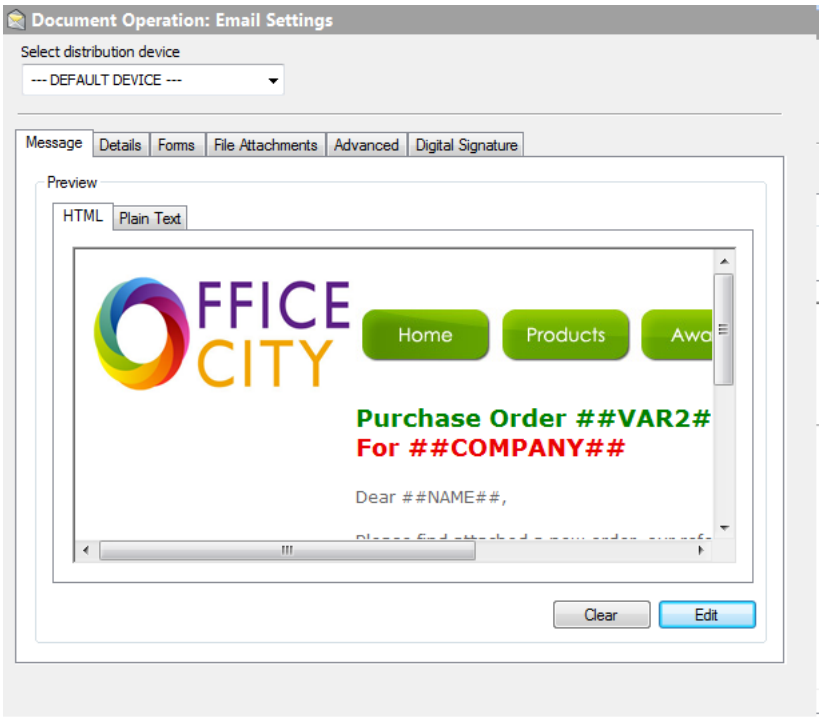
Send at selected date and time

Schedules the fax to be sent at the specified data and time. You can either select an absolute date or you can use Spindle Document Distribution commands to build up the date. For example if you were to enter 25/##MONTHN##/##YEARL## then faxes would be scheduled to sent on the 25th of the current month. If you where to enter ##DATESATURDAY## then faxes would be scheduled to be sent on the next Saturday.

Note: Not all of the fax solutions support these features therefore faxes maybe sent out even if these options are enabled.

7.2.3.3 Email Settings

Email settings are enabled if you have selected Email as one of your distribution types in the Document Operations Distribution Tab (see page 66). These settings are used when a document requires emailing. You can configure many options including the email message, customising the recipient and sender details, and adding file attachments.



Document Operation Email Settings Message Tab

Select distribution device

From the drop-down list you can select the distribution device to use for this operation. As standard '---DEFAULT DEVICE---' is selected, which uses the device selected in the User Settings for the current user.

Preview

Previews of the messages that the recipient will receive in the e-mail. You can create both a Plain Text message and an alternative HTML message to be used if supported by the emailing software. The ## commands can be used to personalise the message or highlight important information such as an invoice amount or the date of a training day. Any embedded command or parse command can be used within the message.

If content is entered in the HTML area, Spindle Document Distribution will send the message as a HTML email, but only if it is supported by the emailing software. Similarly if text is entered in the Plain Text area this will also be sent.

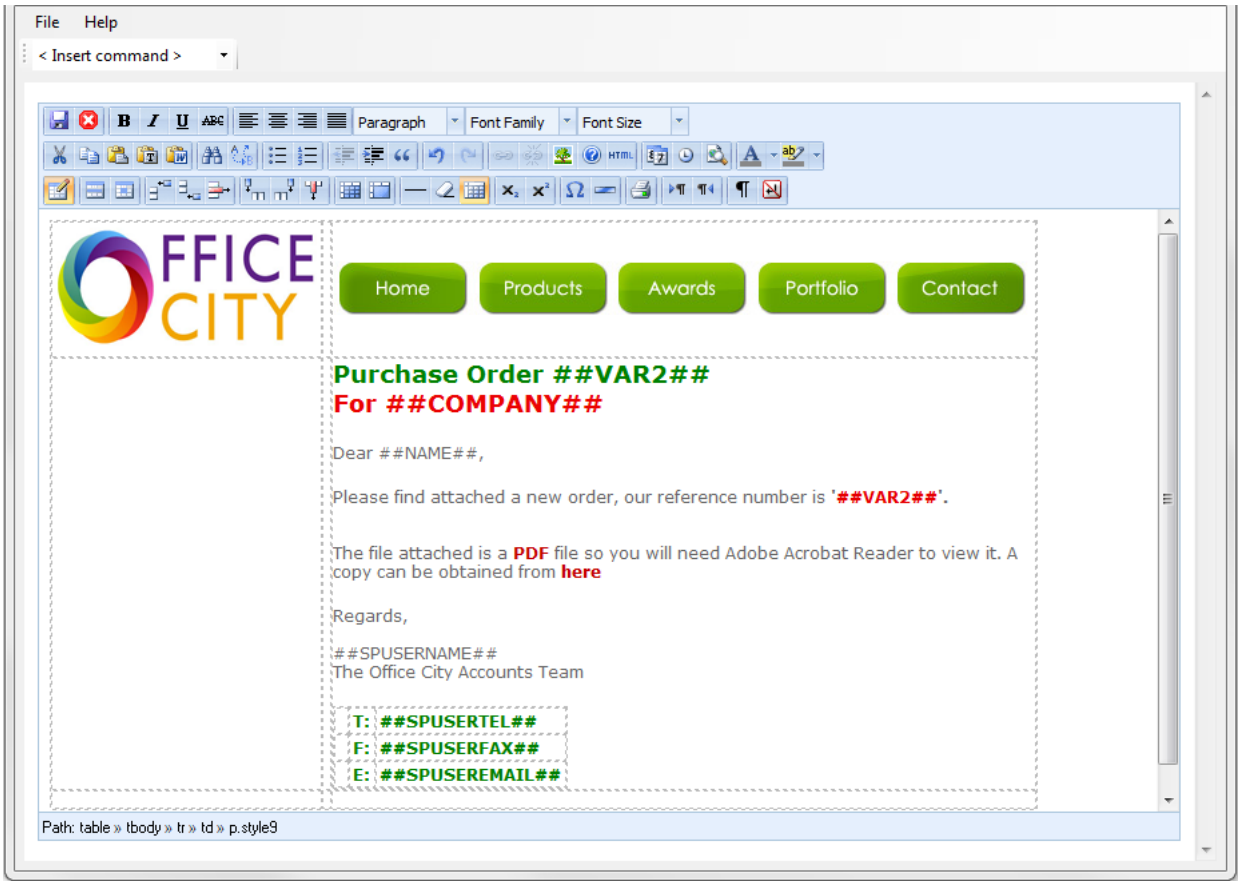
Clear

Deletes all text or HTML content dependant upon which preview tab is topmost. Use of this method is preferable to deleting from within the editor as when content is manually deleted, the editor may in certain circumstances leave behind invisible HTML formatting instructions.

Edit

When the Edit button is pressed an editor appropriate to the preview tab is loaded . If you were previewing the HTML content pane then the editor loaded will provide WSIWYG HTML editing tools.

Note: If you operate with Internet Explorer Enhanced Security turned on you may receive a warning dialog at this point and it is safe to trust SpindleDocDistributionTools.exe.



Message as HTML

Insert a Command

A list of the ## Commands available for insertion to the HTML page.



The HTML tool presents the underlying HTML source pane. If you are cutting and pasting HTML code from an external source, then the paste operation should be performed into this HTML source pane. You are advised that if you cut and paste whole pages there may be a conflict between the HTML header section and body tags you have added, and the HTML header and body tags the editor adds behind the scenes.

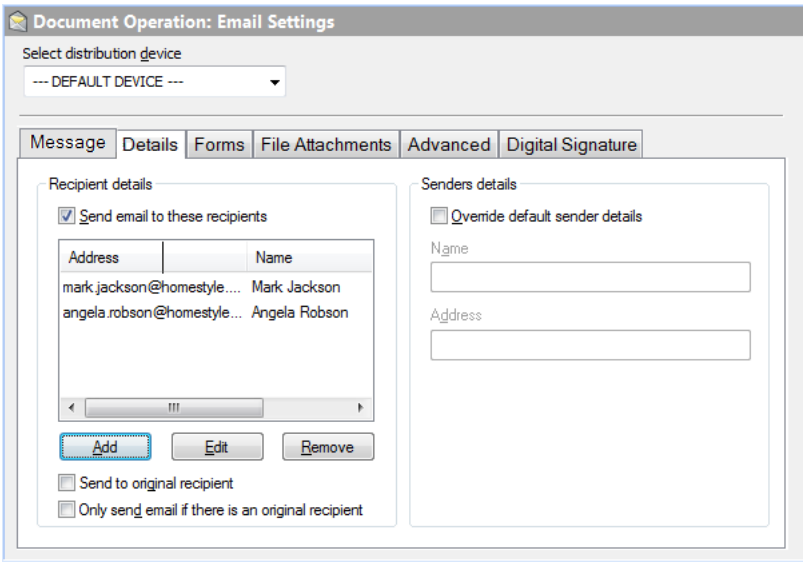
Other Toolbar Icons

Hovering the mouse over any tool provides a brief textual indication of the tools function. Further help on these tools is not

currently available however commonly used and widely accepted icons have been employed.

7.2.3.3.1 Details Tab

Using the Details tab you can specify the recipients of the email and override the senders details.



Document Operation Email Settings Details Tab

Recipient details

Send email to these recipients

Tick this option if the document is intended to be sent to one person or a group of individuals. This will allow you to enter the recipients details in the controls below. You do not need to enable this setting if you are getting the recipients details from the embedded commands ##EMAIL and ##NAME.

This option is predominately used if the document is to be repeatedly sent to the same person or group, e.g. sales reports, aged debtors reports, month end information etc.

Send to original recipient

Allows you to send a copy of the email to the email address found in the ##EMAIL command on the document, as well as the people specified in the list.

Only send email if there is an original recipient

Tick this option if you want the email to be sent to the people specified in the list, only when an email address is found in the ##EMAIL command. If not ticked, the email will be sent to the people in the list regardless of the contents of the ##EMAIL command.

Senders details

Override default sender details

If supported by your email solution tick this option to enable overriding the senders name and email address number. These details appear in the 'reply to' section of the email. This option is not supported by all emailing software. For example, if the document is coming from the accountants department you could set the Name to 'Accounts' and the email address to 'accounts@mycompany.com'. **Note:** For security purposes most email solutions use the original senders details and ignore the overridden details.

Name

The name of the sender. Only available if 'Override default sender details' is ticked and supported by the email solution.

Note: Spindle Document Distribution can parse any ## commands used in the Name field. This means you can set the Name via ## commands on your report designer.

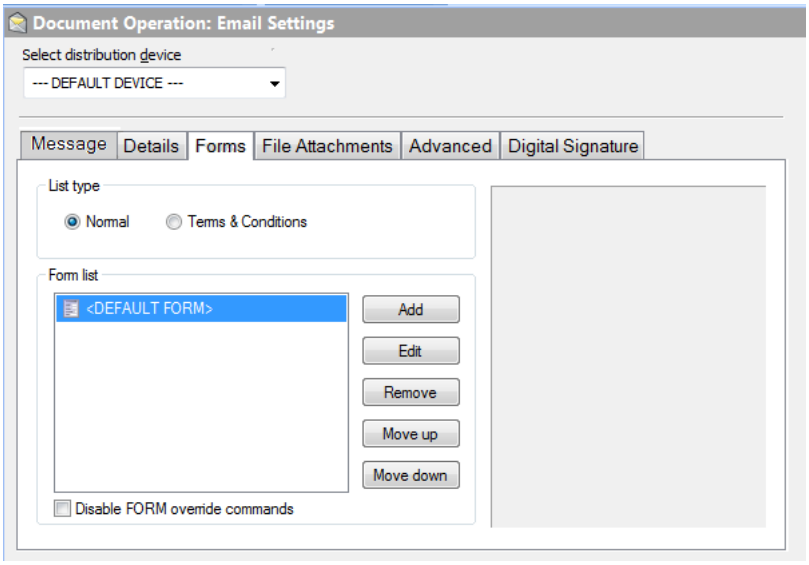
Address

The email address of the sender. Only available if 'Override default sender details' is ticked and supported by the email solution.

Note: Spindle Document Distribution can parse any ## commands used in the Address field. This means you can set the Address via ## commands on your report designer.

7.2.3.3.2 Forms Tab

When Spindle Document Distribution distributes a document to an email device it will use the forms specified in the Default Forms tab (see page 64) on the document operation. The Forms tab in Email Settings can override these forms.



Document Operation Email Settings Form Tab

List type

This controls the type of forms list you want to edit. There are two types of form lists available; Normal and Terms & Conditions.

Normal

Normal forms are applied to each page of your document. A number of forms can be used to build up the finished design. The forms are applied in layers with the first in the list being placed on the bottom, the next form on top of that and so on. When adding a form to the list you can decide if the form should be placed underneath the document page or placed on top of the document page. Placing a form underneath the document allows you to have watermark features. Placing a form on top of the document allows you to hide or mask parts of the original document.

Terms & Conditions

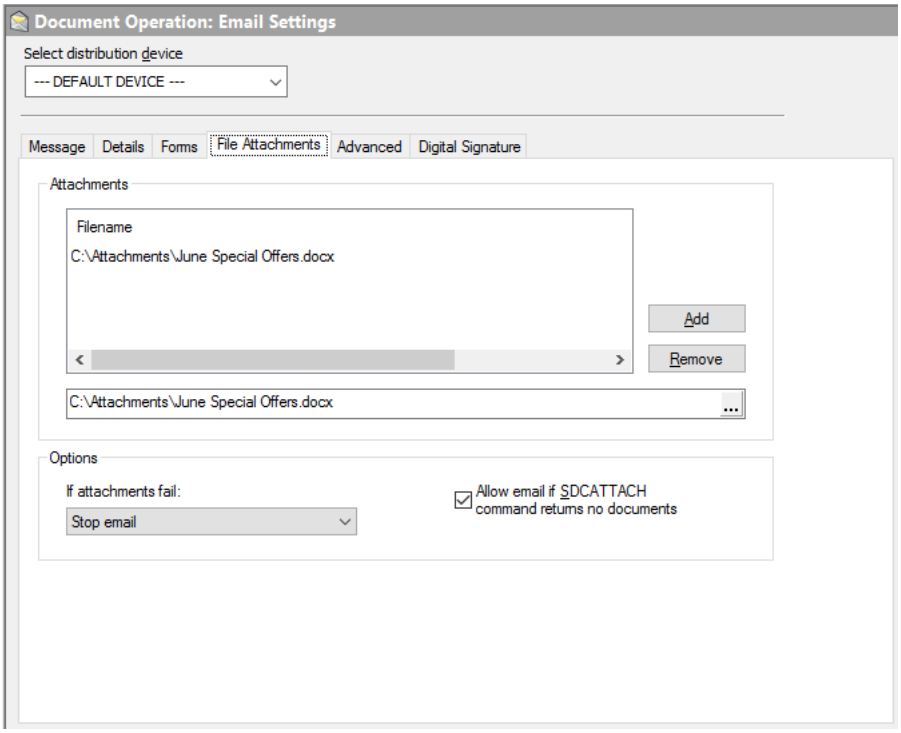
These forms are added on to the end of your document. Terms & Conditions forms contain any information that needs to go with the document, and not just your terms and conditions. For example, you could send directions to your company or a venue, monthly special offers, opening times over a holiday period etc. These types of forms can contain multiple pages.

Disable form override commands

The FORM command can be used to dynamically tell Spindle Document Distribution which form should be applied to the current page, which overrides the selected forms in the list. However, ticking this option disables the FORM command and uses the forms supplied in the list instead. This option is only checked if you have overridden the forms, i.e. you have not selected <DEFAULT FORM>.

7.2.3.3.3 File Attachments Tab

The File Attachments tab enables you to attach extra files to emails. The files are added as separate attachments along with the document that was printed to Spindle Document Distribution. Files can also be attached using the ##ATTACH command or ##SDCATTACH command if you use Spindle Document Capture for archiving.



Document Operation Email Settings File Attachments Tab

Attachments

This is the list of files that will be attached to the email along with the processed document. Each entry can link directly to a file or be built up using the ## commands. Valid examples include:

```
\\fileserver\Documents\MapToOurOffices.pdf
\\fileserver\Documents\##COMPANY##\Delivery Instructions.tif
C:\My Stuff\##MONTHL## Special Offer.pdf
```

If attachments fail drop down

This instructs Spindle Document Distribution how to handle emails when one or more attachments do not exist.

This option can be useful, for example, on a delivery note where you may have a file that specifies unique delivery instructions per account. If the account number is in a command you could attach those files for only accounts where a unique delivery file exists, i.e. '\\Server\Instructions\##VAR1##\SpecialDeliveries.doc'. For accounts that do not have unique delivery instructions, the error could be ignored ('allow email' option below) and processing could continue.

There are three options:

- Allow email

This option will allow an email to be distributed regardless of any failed attachments

- Place email on hold

This option will prevent an email from being sent out if any of the attachments do not exist. The email will instead be placed in the users drafts folder. Note: Not all email solutions support this feature, therefore emails may be sent out even if this option is ticked.

- Stop email

This option will prevent an email from being sent out if any of the attachments do not exist. An error will be displayed.

Allow distribution if SDCATTACH command returns no attachments

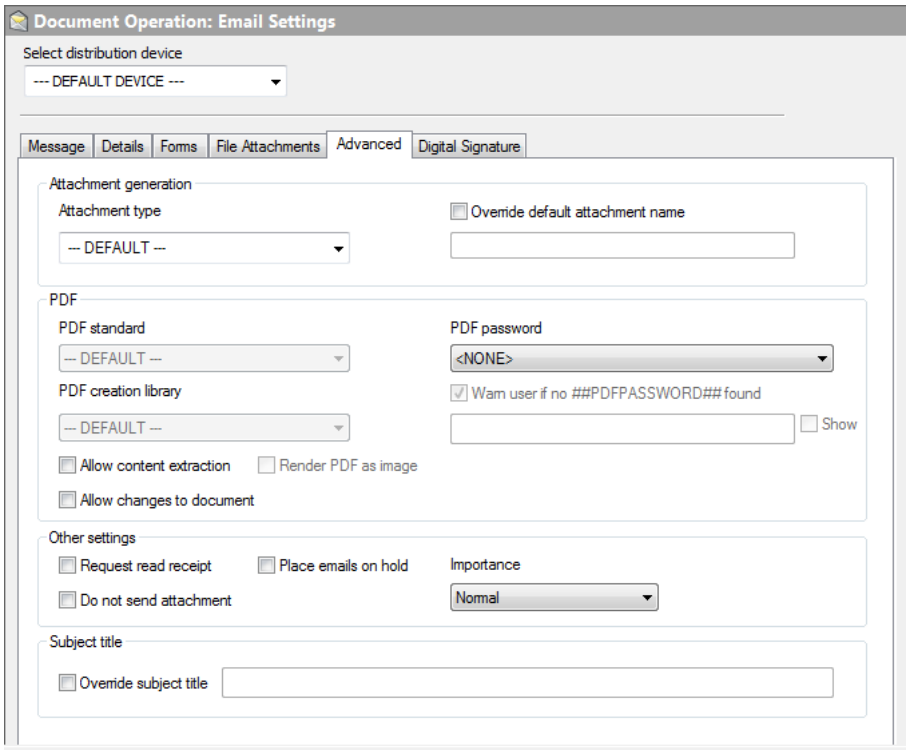
This setting is only applicable when using ##SDCATTACH commands (see page 217) to attach files to your email.

If this option is ticked, it will stop Spindle Document Distribution from failing the distribution if an ##SDCATTACH command returns no files. If there are no attachments, the email will be sent without attachments.

If this option is unticked, Spindle Document Distribution will fail the distribution if an ##SDCATTACH command returns no files. If there are no attachments, the email will not be sent and Spindle Document Distribution will display an error.

7.2.3.3.4 Advanced Tab

This tab allows you to configure any advanced email settings for this operation.



Document Operation Email Settings Advanced Tab

Attachment type

Enables you to override the default attachment type.

Override default attachment name

Allows the name of the generated attachment to be customised, making it more suitable for the contents of the document. Any attachment name not overridden will be called IMG.PDF if Adobe PDF is the default attachment type. The attachment name can be customised using the ## commands. For example when sending a Sales Order to a customer the order number could be used as part of the filename.

Request read receipt

Tick this option if you want to be notified via email that the recipient received and read your email. **Note**: You will only

receive a receipt if it is supported by your selected email solution and the recipients email package.

Do not send attachment

Tick this option if you do not wish to attach the processed document that was printed to Spindle Document Distribution. This can be used to inform internal staff that a document has been sent rather than sending them the original document.

Place emails on hold

This will prevent an email from being sent out and instead placed in the users drafts folder. **Note:** Not all email solutions support this feature, therefore emails may be sent out even if this option is ticked.

Importance

Emails can be sent using one of three levels of importance Low, Normal and High.

Override subject title

The default subject title of the email is taken from 'Subject title' in the document operation settings. You can override the title by ticking this box and entering the new title in the edit control. You can personalise the title using the ## commands.

Allow changes to the document

Tick this option to allow the recipient of the PDF file to change the contents of the document.

Allow content extraction

Tick this option to allow the recipient to copy and paste the contents of the PDF file into another package, for example Microsoft Word.

Render PDF as image

The documents printed to Spindle Document Distribution are converted into Adobe PDF files and contain complex shading, company branding, images and text. Sometimes not all of these elements can be converted correctly into a format that the PDF understands. This can result in a PDF file that contains invalid text items, corrupted images or some other undesired result. Ticking this option attempts to convert the document correctly by creating each document page as an image. However, the quality of the file is decreased, the file size is increased and the text within the PDF file is not searchable. This option should only be enabled if directed to do so by an authorised Draycir Partner.

PDF Standard

This sets the PDF standard to be used on the processed document that is produced by Spindle Document Distribution. There are three options that can be selected from the PDF Standard drop down. These options are;

---DEFAULT---

Selecting this option means the ‘Default PDF Standard’ setting in User Settings – Email Settings will be used.

PDF

Selecting this option means a normal PDF file will be created.

PDF/A-1b

Select this option to produce a PDF file that conforms to the PDF/A-1b standard. The PDF/A-1b standard is a level of PDF/A compliance, which is used for the long-term preservation of digital documents.

Since PDF/A-1b, in its essence, is related to long-term archiving, there are certain requirements and some functionality that is prevented from being applied to the file. For example, PDF passwords are not supported by the PDF/A-1b standard. As such, when selecting the PDF/A-1b option, the Allow content extraction, Allow changes to document and PDF Password fields are disabled.

Note: Only the PDF creation library v4.0.207 and later versions support the PDF/A-1b standard. If you attempt to select the PDF/A-1b option with an incompatible library version, you will be warned and advised to change the PDF Creation library to one that is supported.

PDF Creation Library

Spindle Document Distribution is used with a vast variety of documents and there have been occasions where documents have not rendered consistently between versions of the PDF library. The PDF Creation Library choice allows us to move forward by default, to the latest version of the library and provide for alternative PDF rendering to be established for any problematic document type.

Note: Please be aware that the v4 PDF libraries offer a higher degree of PDF document protection as they use AES-256 encryption. The v3 PDF libraries use 40-bit RC4 encryption, which is not as up-to-date.

PDF Password

Sets a password on the produced PDF files so that only those who know the required password can open and view the PDF. An example of when this functionality may be used is during a pay run whereby employee payslips are generated with a unique password for each employee and subsequently emailed to them.

There are four options that can be selected from the PDF Password drop down;

- Use ##PDFPASSWORD##
- Enter password manually
- Use manual password if no ##PDFPASSWORD## found
- <None>

These options are detailed below;

Use ##PDFPASSWORD##

Selecting this option means the value assigned to the ##PDFPASSWORD## command will be set as the document password. The password can be assigned to ##PDFPASSWORD## either on the report designer or stored via an External Data Link.

Enter password manually

Select this option to enter a manual password in the PDF Password field. To set a password you can;

- Enter free text for a static password.
- Use ## commands.
- Use a combination of both text and ## commands.

For example:

INV##VAR1##ACC##VAR2##

would set the password as INV0005105ACCABC001 when distributed. (Where INV and ACC are free text and ##VAR1 is 0005105 and ##VAR2## is ABC001.)

The **Show** checkbox when enabled displays the text that has been entered into the password field.

Use manual password if no ##PDFPASSWORD## found

Select this option if you want the manually entered password to be used if a ##PDFPASSWORD## command is not found or not set. Initially, the value assigned to ##PDFPASSWORD## on the report designer or via an external data link will be set as the document password. However, if the ##PDFPASSWORD## command is not present, blank or not set, then the password entered into the PDF password field will be used as the document password.

Note: If both the ##PDFPASSWORD## command and password field are not set, then the distribution will fail.

<NONE>

Selecting this option means that no password will be set on the PDF regardless of what is assigned to the ##PDFPASSWORD## command. **Note:** This is the default option.

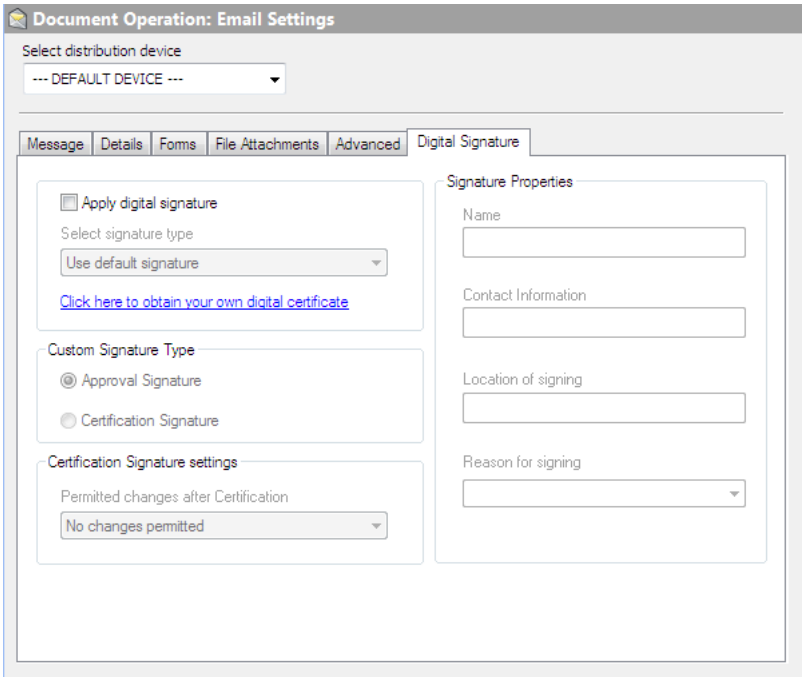
Warn user if no ##PDFPASSWORD## found

Tick this option if you want a warning to be displayed during processing to notify the user that no ##PDFPASSWORD## command was found or no value was supplied. By ticking this option you will be warned, however this will not stop the distribution of the PDF.

Note: This option is enabled if you select "Use ##PDFPASSWORD##" or "Use manual password if no ##PDFPASSWORD## is found".

7.2.3.3.5 Digital Signature Tab

The Digital Signature tab provides the facility to electronically sign the PDF files.



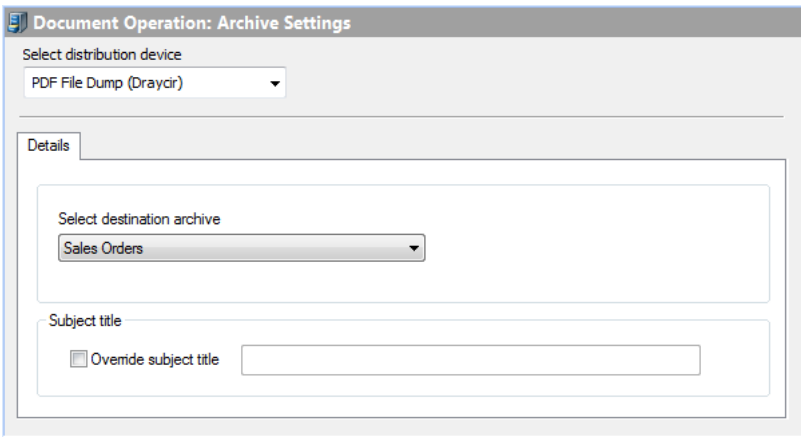
Document Settings Digital Signature Tab

The signature capability within Spindle Document Distribution has been designed to provide Certified Document Services (CDS) through an Adobe CDS provider. A CDS signature certifies to the recipient of the signed PDF that the author's identity has been verified by a trusted organization and that the document has not been altered. The trusted status of the PDF is displayed in Adobe PDF reading applications by a blue ribbon or green tick, an information panel and a bar at the top of the screen.

The Digital Signature dialogs used in e-mail and archive settings appear the same as, and inherit default values from the current user's settings. See the User Settings (see page 195) section of the help file for further information.

7.2.3.4 Archive Settings

Archive settings are enabled if you have selected Archive as one of your distribution types in the Document Operations Distribution Tab (see page 66). These settings are used when a document requires archiving and controls which archive entry will be used for archiving.



Document Operation Archive Settings Details Tab

Select distribution device

From the drop-down list you can select the distribution device to use for this operation. Unlike the other distribution nodes there is no '---DEFAULT DEVICE---'. The reason why is since each archive entry in the Archive Manager (see page 93) is linked to a particular type of archive, these setting would be incompatible if two or more users had different archive devices as their default device.

Select destination archive

Choose the archive entry to use. The settings in the archive entry will be used to archive the document. Only the entries appropriate to the selected distribution device will be displayed. E.g., if you have selected Microsoft SharePoint as the device, only the SharePoint archive entries will be shown in the list.

Override subject title

The default subject title of the email is taken from 'Subject title' in the document operation settings. You can override the title by ticking this box and entering the new title in the edit control. You can personalise the title using the ## commands.

Version Comments

If the distribution device is set to Microsoft SharePoint this edit box becomes available. These comments can help track the changes to documents if they are archived multiple times. To use this you must also have versioning enabled on the destination SharePoint document library.

7.2.3.5 CRM Settings

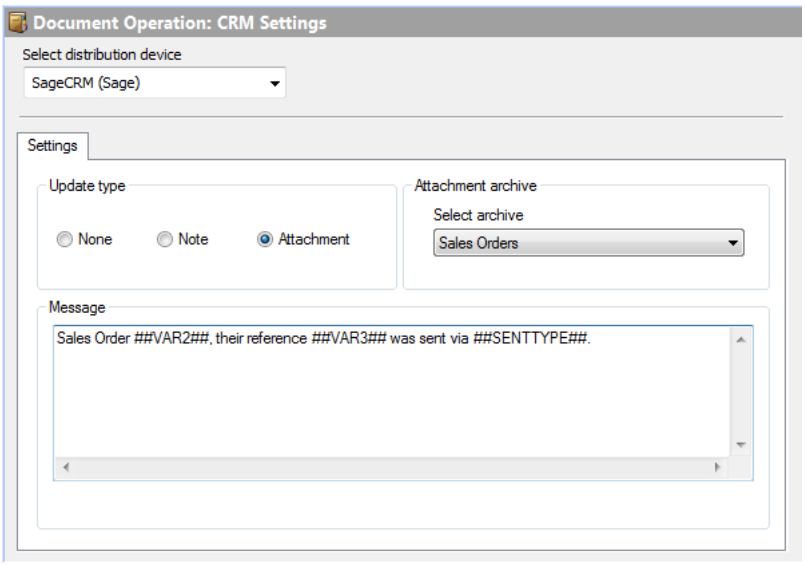
CRM settings are enabled if you have selected CRM as one of your distribution types in the Document Operations Distribution Tab (see page 66).

Spindle Document Distribution uses several embedded commands from the document or external data to find the contact in the CRM system. You MUST have a matching person and company name in the CRM system to the recipient of the document. Spindle Document Distribution will first try to match the CRM company with the value found in ##CRMCOMPANY. If this command is empty it will use the value in ##COMPANY instead.

Once the company is found Spindle Document Distribution will then search for the matching contact. First, it will try to match the CRM contact name with the values found in ##CRMFNAME and ##CRMSNAME (for forename and surname). The ##CRMFNAME command can contain both the forename and surname if you are unable to get these two values separated. If these are empty it will use the value in ##NAME instead.

Only when a valid company and contact name have been found will Spindle Document Distribution be able to link a document to a contact or make a note in the CRM system.

Tip: Do not forget that External Data could be used to retrieve the required contact information from a different source of data and stored in the ##CRM.



Document Operation CRM Settings Tab

Select distribution device

From the drop-down list you can select the distribution device to use for this operation. As standard '---DEFAULT DEVICE---' is selected, which uses the device selected in the User Settings for the current user.

Update type

Selects how the CRM record will be updated. Possible options are:

- **None** - No update is perform.
- **Note** - Write a note against the company / contact.
- **Attachment** - Archive the file into the CRM system or create a link to the physically archived file, depending on the CRM system you are using.

Select archive

Select the archive that this CRM entry is going to use if it creates a link to the file.

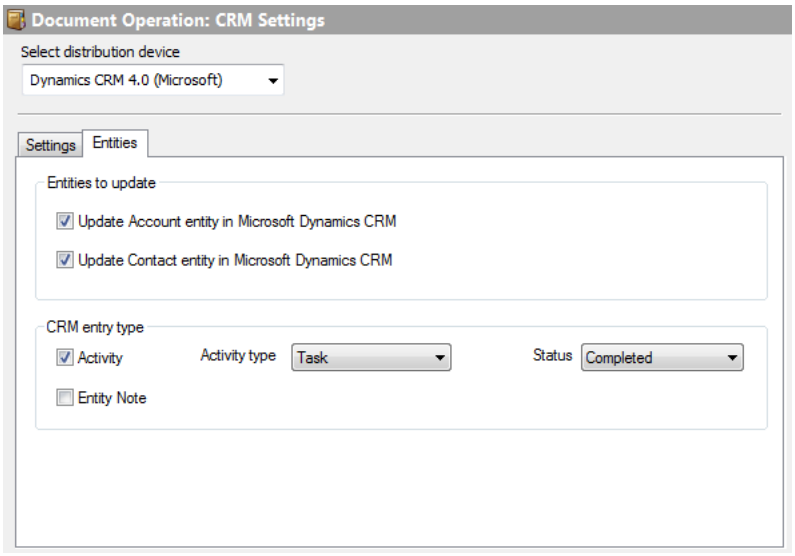
Message

This is the text that will appear in your CRM system. The text may be personalised with the ## commands. E.g. ##EMAIL## would be replaced by the recipients email address while ##DATE## would be replaced with the current date. You can use the ##SENTTYPE## command to note how the original document was dispatched.

Note: To link an archived document to the CRM system you must archive the document on this operation. You cannot link documents archived from other operations.

7.2.3.5.1 Entities Tab

The entities tab only appears if you are using Microsoft Dynamics CRM 3.0 or 4.0 as your destination CRM device and contains specific options for Microsoft Dynamics CRM. Attachments, activities and notes can be added to named Accounts entities, Contact entities or both.



Document Operation CRM Entities Tab

Update Account entity in Microsoft Dynamics CRM

Ticking this option will update the account entity in Microsoft Dynamics CRM. The account entity is the company.

Update Contact entity in Microsoft Dynamics CRM

Ticking this option will update the contact entity in Microsoft Dynamics CRM. The contact entity is a person associated to a company.

Activity

Ticking this option will create an activity entry on the Account and/or Contact depending on what has been selected in the section Entities to update. When ticked, the options for Activity type and Status become enabled.

Activity type

You can select the activity type that will be created, either a Task or Letter.

Status

Selects the status of the newly created activity. This can either be Open or Completed.

Entity Note

Ticking this option will create a note or attachment entry on the Account and/or Contact depending on what has been selected in the section Entities to update.

The following Spindle Document Distribution command combinations are valid when used in association with either Microsoft Dynamics CRM devices:

For Account Entity:

- Company
  - ##COMPANY##
  - ##CRMCOMPANY##

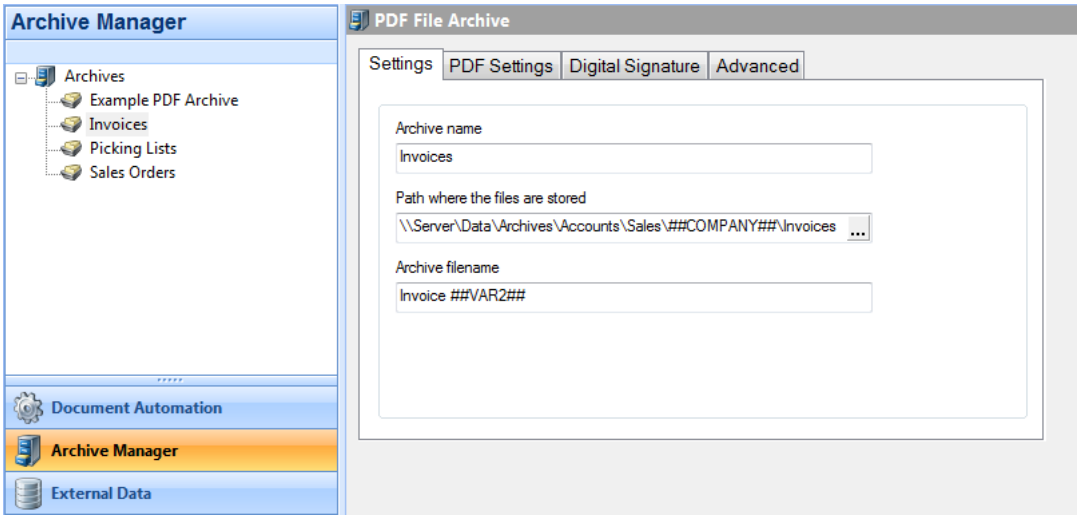
For Contact Entity:

- First Name, Surname & Company
  - ##CRMFNAME##, ##CRMSNAME## & ##CRMCOMPANY##

    - ##CRMFNAME##, ##CRMSNAME## & ##COMPANY##
- Surname & Company
    - ##CRMSNAME##, ##COMPANY##
    - ##CRMSNAME##, ##CRMCOMPANY##
- First Name & Company
    - ##CRMFNAME##, ##COMPANY##
    - ##CRMFNAME##, ##CRMCOMPANY##
- First Name & Surname
    - ##CRMFNAME##, ##CRMSNAME##
- Fullname & Company
    - ##NAME##, ##COMPANY##
    - ##NAME##, ##CRMCOMPANY##
    - ##CRMFNAME##*, ##COMPANY##
    - ##CRMFNAME##*, ##CRMCOMPANY##

7.3 Archive Manager

The Archive Manager controls the creation and management of archives. Each archive entry contains the configuration settings for linking to a particular type of archive device, the name and location of output files, as well as file creation and security preferences. Once configured these archive entries can be used by Document Types (see page 89) to archive processed documents.



Archive Manager screen shot

Spindle Document Distribution can archive documents to five different devices:

- PDF File Archive
- Microsoft SharePoint
- Invu Link Manager
- Spindle Document Capture Archive
- Sage 200 2013+ Archive

PDF File Archive

Using this device allows you to save your documents as PDF files in a folder/directory structure on your network. You can build up the folder structure using ## commands and Spindle Document Distribution will automatically create any folders that do not exist. In addition to creating the PDF you can also create a corresponding CSV (comma separated values) file which contains all of the ## commands extracted from the document. This is useful if you are creating your own document archiving system and need index information for each file.

Microsoft SharePoint

SharePoint is a web-based collaboration and document management platform from Microsoft. It can be used to access shared workspaces and documents, as well as many other forms of applications, from within a browser. Spindle Document Distribution allows users to archive documents as PDF files into SharePoint document libraries. At the same time it can add 'meta-data'; keywords that the user can search on. These keywords can be taken from the ## commands on the document page, such as the invoice number, company name or account number.

Invu Link Manager

Invu is a 3rd party document archiving system. The device enables you to archive your documents into Invu using the Invu Link Manager application. This device saves the PDF files in a given location on your network and adds an entry to a single CSV file. The Invu Link Manager monitors this location and detects when the CSV file contains new information. It will then use the information contained within the CSV file to index the PDF files into the Invu system.

Spindle Document Capture Archive

Spindle Document Capture is Draycir's document archiving solution. Spindle Document Distribution allows users to pass PDF copies of documents into the Spindle Document Capture either directly (if providing data to enable association of the document to objects in the host system), or to the Spindle Document Capture Pending Tray where appropriate associations can be made later. Once these documents are archived, you will be able to retrieve and view these from within your host system (if compatible with Spindle Document Capture).

Sage 200 2013+ Archive

Starting with Sage 200 2013 (both on-premise and online), using this device allows you to archive your documents against either the Sales or Purchase account. These files are then retrievable via the Attachments tab in Sage 200. **Note:** Earlier versions of Sage 200 are not compatible with this device.

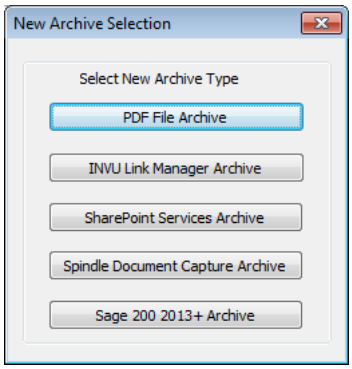
The document that is archived is the version that has been distributed either by email, fax or printer. This means if the document was emailed then the document would contain the forms that were used in the email.

7.3.1 Creating archives

Archives allow you to save documents so you can retrieve them at a later date and electronically store all outgoing documents.

To create an archive entry:

1. Launch Spindle Document Distribution Tools and select **Archive Manager** from the shortcut bar.
2. In the tree window right-click and select **New Archive** from the menu. You can also click the  button from the Archive Manager toolbar.
3. The New Archive Selection dialog box appears. See below:



4. Press the button corresponding to the archive type you want to create.
5. A new entry will appear in the tree window called **New Archive**. Rename the entry, e.g. 'Invoice PDF Archive'.
6. The archive entry has been created. You can now edit its settings.

Tip: Each archive type (PDF File, INVU Link Manager, SharePoint Services, Spindle Document Capture and Sage 200) each have their own custom settings.

7.3.2 Deleting Archives

If you delete an archive entry you must remove all references to it in Document Automation.

To delete an archive entry:

1. Launch Spindle Document Distribution Tools and select **Archive Manager** from the shortcut bar.
2. In the tree window right-click on the archive entry you want to delete and select **Delete Archive** from the menu. You can also click the button from the Archive Manager toolbar.
3. A dialog box will appear asking you to confirm that you want to delete the archive entry. Click **Yes**.
4. The archive entry will be removed from the list.

Tip: Deleting an archive does not delete the files stored within it. It only deletes the entry which tells Spindle Document Distribution how to connect to a particular archive.

7.3.3 Renaming archives

To rename an archive entry:

1. Launch Spindle Document Distribution Tools and select **Archive Manager** from the shortcut bar.
2. In the tree window right-click on the archive entry you want to rename and select **Rename Archive** from the menu. You can also click the button from the Archive Manager toolbar.
3. The archive entry name in the tree window becomes highlighted.
4. Type in the new name of the archive entry and press return.
5. The archive entry has now been renamed.

or

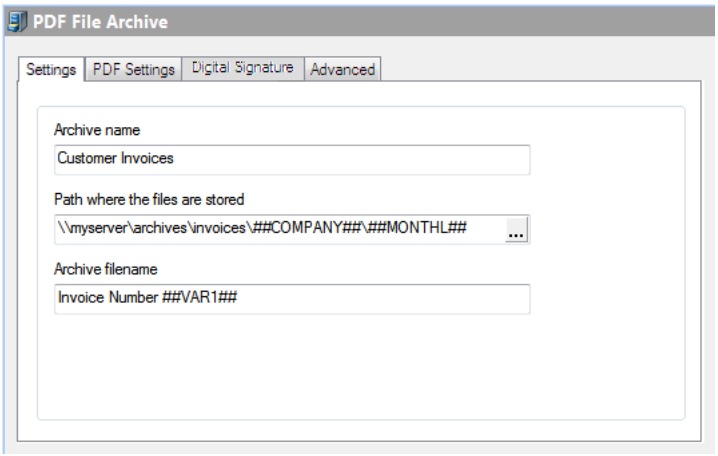
1. Launch Spindle Document Distribution Tools and select **Archive Manager** from the shortcut bar.
2. In the tree window left-click on the archive entry you want to rename.
3. In the dialog window type in the new name of the archive entry in the **Archive name** edit box.
4. As soon as the edit window loses focus the archive entry is renamed.

7.3.4 PDF Archive

The PDF Archive device allows you to save your documents as PDF files in a folder/directory structure on your network. You can build up the folder structure using ## commands and Spindle Document Distribution will automatically create any folders that do not exist. In addition to creating the PDF you can also create a corresponding CSV (comma separated values) file which contains all of the ## commands extracted from the document. This is useful if you are creating your own document archiving system and need index information for each file.

7.3.4.1 Settings Tab

This page is where you configure the main settings for an archive, it's name and file generation information.



PDF File Archive Settings Tab

Archive Name

The name of the archive entry. This is the name displayed when choosing the archive in a Document Operation (see page 61).

Path where the files are stored

Points to the directory path where the PDF files and CSV files (see Advanced Tab (see page 100)) are created. You can select the path by pressing the ... button which will display a **Browse for Folder** dialog box.

You can build up the path using Spindle Document Distribution commands such as ##COMPANY, ##VAR etc. When processing a document, if the path does not exist Spindle Document Distribution will automatically create the directory structure.

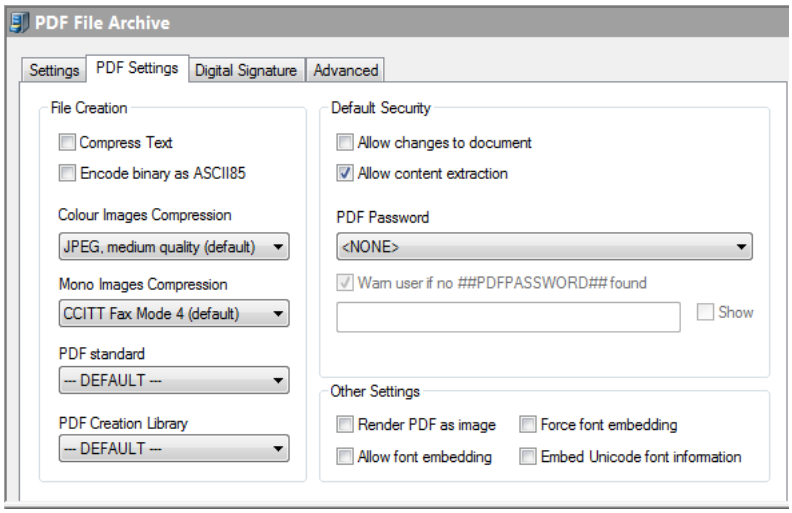
Archive filename

The name of the PDF file and CSV file that will be created. You can also build up the filename by using Spindle Document Distribution commands. **Note:** Do not enter the extension part of the file name, i.e. '.PDF', as this is automatically added by Spindle Document Distribution.

7.3.4.2 PDF Settings Tab

The PDF settings tab allows you to alter the parameters for the creation of PDF files. By default Spindle Document Distribution has already selected the most reasonable settings to maximise quality yet still produce reasonably sized PDF

files.



PDF Settings Tab

Compress Text

Tick to compress the text within the PDF file. This should result in a smaller file size.

Encode binary as ASCII85

Ticking this option will encode information in the ASCII format. This will result in a larger file size.

Colour Images Compression

Sets the compression rate for colour images within the PDF file. A higher compression rate will reduce the file size but will also result in lower image quality.

Mono Images Compression

Sets the compression rate for mono images within the PDF file.

PDF Standard

This sets the PDF standard to be used on the processed document that is produced by Spindle Document Distribution. There are three options that can be selected from the PDF Standard drop down. These options are;

---DEFAULT---

Selecting this option means the 'Default PDF Standard' setting in User Settings – Archive Settings will be used.

PDF

Selecting this option means a normal PDF file will be created.

PDF/A-1b

Select this option to produce a PDF file that conforms to the PDF/A-1b standard. The PDF/A-1b standard is a level of PDF/A compliance, which is used for the long-term preservation of digital documents.

Since PDF/A-1b, in its essence, is related to long-term archiving, there are certain requirements and some functionality that is prevented from being applied to the file. For example, PDF passwords are not supported by the PDF/A-1b standard. Also fonts must be embedded into the PDF. As such, when selecting the PDF/A-1b option, the Allow content extraction, Allow changes to document, PDF Password fields and font fields are disabled.

Note: Only the PDF creation library v4.0.207 and later versions support the PDF/A-1b standard. If you attempt to select the

PDF/A-1b option with an incompatible library version, you will be warned and advised to change the PDF Creation library to one that is supported.

PDF Creation Library

Spindle Document Distribution is used with a vast variety of documents and there have been occasions where documents have not rendered consistently between versions of the PDF library. The PDF Creation Library choice allows us to move forward by default, to the latest version of the library and provide for alternative PDF rendering to be established for any problematic document type.

Note: Please be aware that the v4 PDF libraries offer a higher degree of PDF document protection as they use AES-256 encryption. The v3 PDF libraries use 40-bit RC4 encryption, which is not as up-to-date.

Allow changes to the document

Tick this option to allow the recipient of the PDF file to change the contents of the document.

Allow content extraction

Tick this option to allow the recipient to copy and paste the contents of the PDF file into another package, for example Microsoft Word.

PDF Password

Sets a password on the produced PDF files so that only those who know the required password can open and view the PDF. An example of when this functionality may be used is during a pay run whereby employee payslips are generated with a unique password for each employee and subsequently emailed to them.

There are four options that can be selected from the PDF Password drop down;

- Use ##PDFPASSWORD##
- Enter password manually
- Use manual password if no ##PDFPASSWORD## found
- <None>

These options are detailed below;

Use ##PDFPASSWORD##

Selecting this option means the value assigned to the ##PDFPASSWORD## command will be set as the document password. The password can be assigned to ##PDFPASSWORD## either on the report designer or stored via an External Data Link.

Enter password manually

Select this option to enter a manual password in the PDF Password field. To set a password you can;

- Enter free text for a static password.
- Use ## commands.
- Use a combination of both text and ## commands.

For example:

INV##VAR1##ACC##VAR2##

would set the password as INV0005105ACCABC001 when distributed. (Where INV and ACC are free text and ##VAR1 is 0005105 and ##VAR2## is ABC001.)

The **Show** checkbox when enabled displays the text that has been entered into the password field.

Use manual password if no ##PDFPASSWORD## found

Select this option if you want the manually entered password to be used if a ##PDFPASSWORD## command is not found or not set. Initially, the value assigned to ##PDFPASSWORD## on the report designer or via an external data link will be set as the document password. However, if the ##PDFPASSWORD## command is not present, blank or not set, then the password entered into the PDF password field will be used as the document password.

Note: If both the ##PDFPASSWORD## command and password field are not set, then the distribution will fail.

<NONE>

Selecting this option means that no password will be set on the PDF regardless of what is assigned to the ##PDFPASSWORD## command. **Note:** This is the default option.

Warn user if no ##PDFPASSWORD## found

Tick this option if you want a warning to be displayed during processing to notify the user that no ##PDFPASSWORD## command was found or no value was supplied. By ticking this option you will be warned, however this will not stop the distribution of the PDF.

Note: This option is enabled if you select the option "Use ##PDFPASSWORD##" or "Use manual password if no ##PDFPASSWORD## is found".

Render PDF as image

The documents printed to Spindle Document Distribution are converted into Adobe PDF files and contain complex shading, company branding, images and text. Sometimes not all of these elements can be converted correctly into a format that the PDF understands. This can result in a PDF file that contains invalid text items, corrupted images or some other undesired result. Ticking this option attempts to convert the document correctly by creating each document page as an image. However, the quality of the file is decreased, the file size is increased and the text within the PDF file is not searchable. This option should only be enabled if directed to do so by an authorised Draycir Partner.

Allow font embedding

Font embedding enables Spindle Document Distribution to store the fonts used within the PDF file itself. This enables the person viewing the PDF file to see the text in the original fonts even if that font is not installed on their computer. Embedding fonts within the PDF file will increase its file size. Within each font there is a copyright flag which authorises the distributing of that font. This option will only embed fonts that are authorised for distribution.

Force font embedding

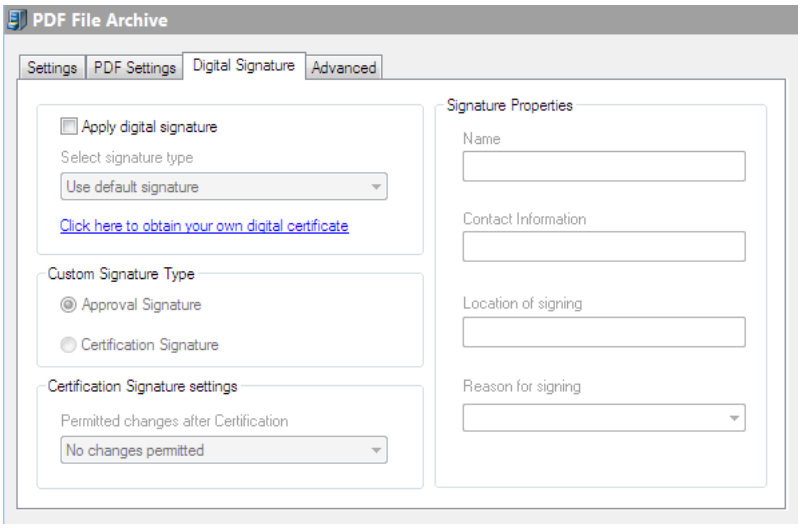
This option works in conjunction with Allow font embedding. Normally, only fonts that are authorised for distribution are embedded into PDF files created by Spindle Document Distribution. However, this option overrides this setting and forces the font to be embedded in to the PDF file. You will need to get permission from the owner of the font you want to embed before you enable this option. **Note: if you enable this setting without obtaining the font owners permission you may be breaking copyright law.**

Embed Unicode font information

Unicode is a technical specification of the amount of space that is required to store a character in any of the world's languages. Tick this option if the PDF file needs to support larger character sets.

7.3.4.3 Digital Signature Tab

The Digital Signature tab provides the facility to electronically sign PDF files.



Digital Signature Tab

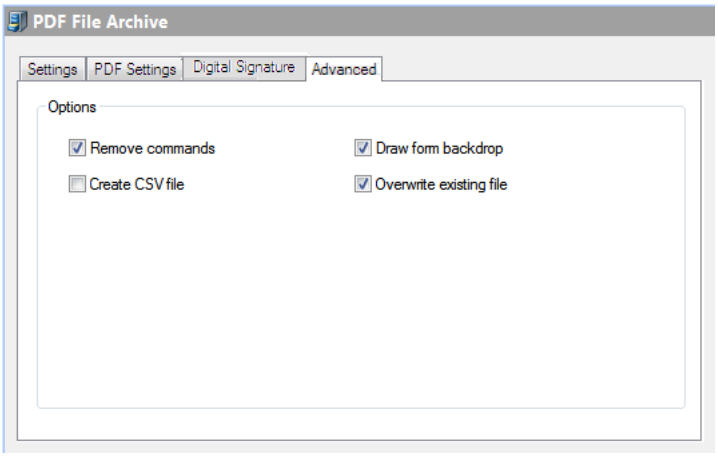
Digital signature

The signature capability within Spindle Document Distribution has been designed to provide Certified Document Services (CDS) through an Adobe CDS provider. A CDS signature certifies to the recipient of the signed PDF that the author's identity has been verified by a trusted organisation and that the document has not been altered. The trusted status of the PDF is displayed in Adobe PDF reading applications, by a blue ribbon or green tick, an information panel and a bar at the top of the screen.

The Digital Signature dialogs used in e-mail and archive settings appear the same as, and inherit default values from the current user's settings. See the User Settings (see page 195) section of the help file for further information.

7.3.4.4 Advanced Tab

Advanced settings should only be changed by an experienced Spindle Document Distribution installer.



Advanced Tab

Remove commands

Removes the Spindle Document Distribution embedded commands from the document before archiving the file. To leave the commands in the archived document untick this option. Default setting is ticked (remove the commands).

Draw form backdrop

Saves the PDF file with the forms that have been selected in the document operation. To reduce the size of the PDF file you can untick this option which will create the PDF file without any forms. Default setting is ticked.

Create CSV file

Creates a corresponding CSV (Comma Separated Values) file containing all the commands extracted from the document. The name of the CSV file will be the name specified in the Settings Tab with a '.CSV' extension. Default setting is not ticked.

The CSV could be used with a custom document management solution, enabling you to archive the PDF files and using the CSV data as the indexing information.

Overwrite existing file

Tick this option to overwrite a PDF file that already exists with the same name. If not ticked the PDF file will be saved with '(1)' attached to the end of its name, or '(2)' etc, if that file already exists. Default setting is ticked.

7.3.5 Microsoft SharePoint Archive

Microsoft SharePoint is a web-based collaboration and document management platform from Microsoft. It can be used to access shared workspaces and documents, as well as many other forms of applications, from within a browser. Spindle Document Distribution allows users to archive documents as PDF files into SharePoint document libraries. At the same time it can add 'meta-data'; keywords that the user can search on. These keywords can be taken from the ## commands on the document page, such as the invoice number, company name or account number. Within SharePoint the 'meta-data' to associate with a document can be grouped together within a 'Content Type'. Content Types enable the management of settings for different categories of information in a centralized and reusable way.

Spindle Document Distribution supports the following versions of SharePoint:

- Windows SharePoint Services V2.0 (WSS 2.0) - Free version which comes installed on Microsoft Small Business Server 2003.
- Windows SharePoint Services V3.0 (WSS 3.0) - Freely available to download from the Microsoft website.
- Microsoft Office SharePoint Server (MOSS 2007) - Commercial version and part of the Microsoft Office family.
- Microsoft SharePoint Foundation & Server 2010
- Microsoft SharePoint Foundation & Server 2013
- Microsoft SharePoint Foundation & Server 2016
- Microsoft SharePoint Online

Fully Searchable PDF Files

Adobe PDF IFilter is a free downloadable Dynamic Link Library (DLL) file that provides a bridge between a Microsoft indexing client such as SharePoint and a library of Adobe PDF files. It consists of code that understands the Adobe Portable Document Format as well as code that can interface with the indexing client. When an indexing client needs to index content from PDF files, it will look in its registry for an appropriate DLL and will find the Adobe PDF IFilter. Adobe PDF IFilter will return text to the indexing client. The indexing client will then index the results and return the appropriate results to the user.

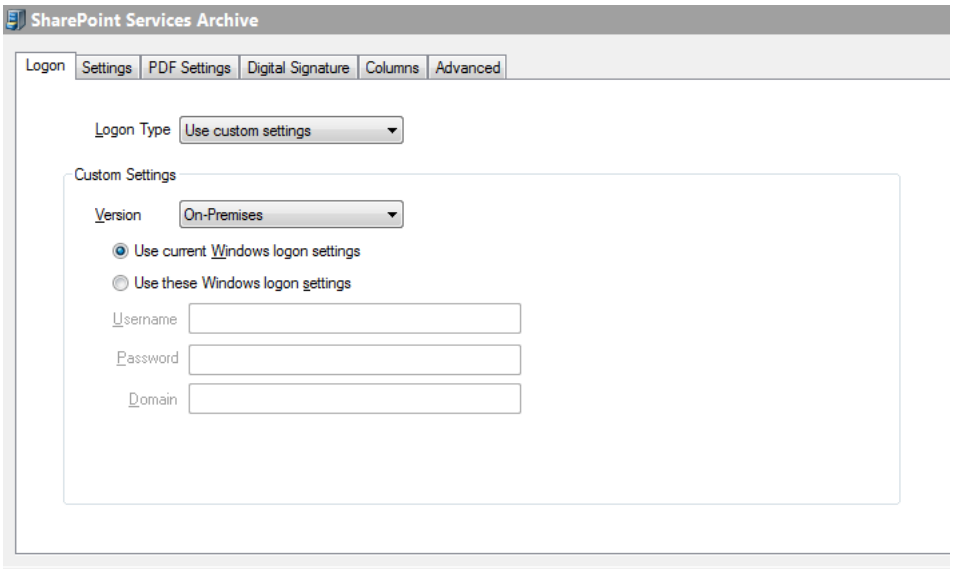
Installing the Adobe PDF IFilter on your Microsoft SharePoint server enables SharePoint to fully index the PDF files archived by Spindle Document Distribution.

You can download the Adobe PDF IFilter from the following website:

http://www.adobe.com/support/downloads/detail.jsp?ftpID=2611

7.3.5.1 Logon Tab

The Logon tab is where you tell Spindle Document Distribution how to logon to the SharePoint site when it is archiving documents. Users who want to save files to SharePoint must have the correct permissions on the destination document library.



SharePoint Services Archive Logon Tab

Logon Type

Allows you to specify if you would like to 'Use user settings' or 'Use custom settings'.

- Use user settings

This option uses the details defined in the Spindle Document Distribution SharePoint device settings dialog. These details can be set by going to the Device Manager (see page 153), selecting the Microsoft SharePoint archive device and pressing the Configure button. These settings are stored for each user and can be used if your SharePoint logon is different to your Windows logon.

- Use custom settings

This option allows you to set specific logon credentials for this archive.

Version

Select either 'Online' or 'On-Premises' depending on your version of SharePoint.

If you have SharePoint 2013 Online (standalone on a plan) or SharePoint with Office 365, select 'Online'. If you have a hosted version of SharePoint, please check with your hosting company as to whether your SharePoint is truly Online or if they are hosting your SharePoint server. If your version of SharePoint uses Windows Authentication to connect, then you are on an On-Premises version of SharePoint.

Online

If you select the Version as 'Online', Spindle Document Distribution will use Forms based Authentication to connect to SharePoint. You will need to provide the Username and Password credentials of the SharePoint user that you want to archive the documents under. This user must have the relevant permissions in SharePoint.

On-Premises

If you select 'On-Premises', Spindle Document Distribution will use Windows Authentication to connect to SharePoint. You

can either select 'Use current Windows logon settings' or 'Use these Windows logon settings' if you would like to specify the logon credentials.

Use current Windows logon settings

Attempts to use the settings of the user logged on to the computer when Spindle Document Distribution is processing the document. To use this option your logon details to the SharePoint site must be the same as your logon details to your computer/domain.

Use these Windows logon settings

Use this option if you want to use a specific Windows user to logon onto your SharePoint site. For example, on your domain you could have a user called 'Spindle Document Distribution' and always use this user to archive files. This way, in SharePoint you could easily distinguish when a document was archived by Spindle Document Distribution or by a normal user.

Username

The logon name of the Windows user to use.

Password

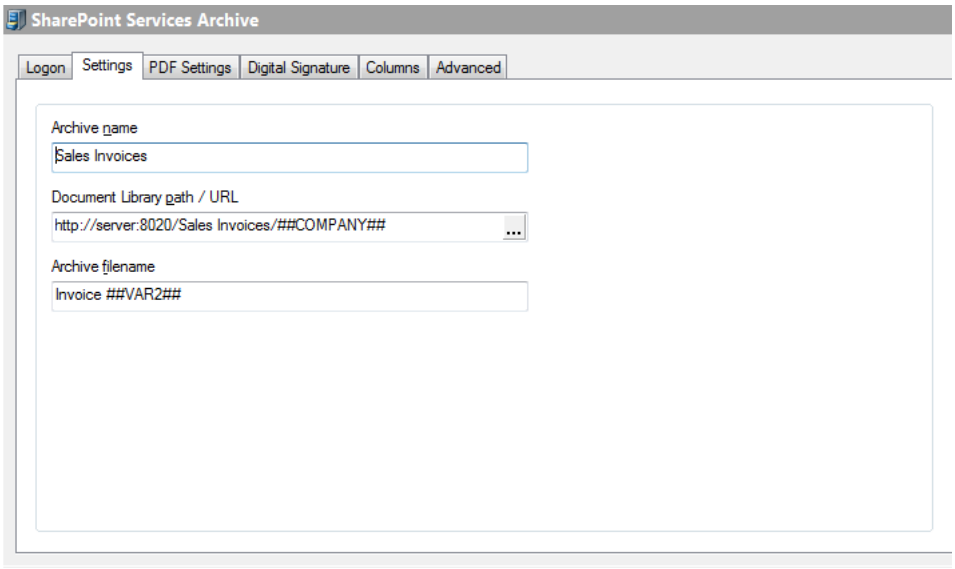
The users password. This value is stored in an encrypted, unreadable format.

Domain

The domain of the Windows user.

7.3.5.2 Settings Tab

This page is where you configure the main settings for an archive, it's name and file generation information.



SharePoint Services Archive Settings Tab

Archive name

The name of the archive entry. This is the name displayed when choosing the archive in a Document Operation (see page 61).

Document Library path / URL

Points to the SharePoint URL, document library and path where the PDF files are created. You can select the path by pressing the ... button which will display a **Browse SharePoint Document Library** dialog box.

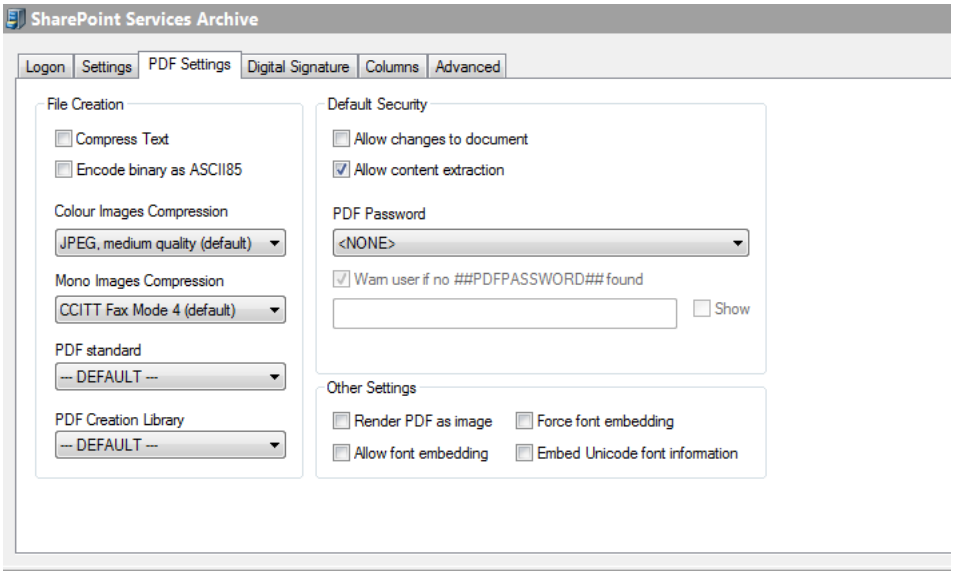
You can build up the URL using Spindle Document Distribution commands such as ##COMPANY, ##VAR etc. When processing a document if the path does not exist, Spindle Document Distribution will automatically create the directory structure on the SharePoint site.

Archive filename

The name of the PDF file that will be created. You can build up the filename by using Spindle Document Distribution commands. **Note:** Do not include the extension part of the file name, i.e. '.PDF', as this is automatically added by Spindle Document Distribution.

7.3.5.3 PDF Settings Tab

The PDF settings tab allows you to alter the parameters for the creation of PDF files. By default Spindle Document Distribution has already selected the most reasonable settings to maximise quality yet still produce reasonable sized PDF files.



SharePoint Services Archive PDF Settings Tab

Compress Text

Tick to compress the text within the PDF file. This should result in a smaller file size.

Encode binary as ASCII85

Ticking this option will encode information in the ASCII format. This will result in a larger file size.

Colour Images Compression

Sets the compression rate for colour images within the PDF file. A higher compression rate will reduce the file size but will also result in lower image quality.

Mono Images Compression

Sets the compression rate for mono images within the PDF file.

PDF Standard

This sets the PDF standard to be used on the processed document that is produced by Spindle Document Distribution. There are three options that can be selected from the PDF Standard drop down. These options are;

---DEFAULT---

Selecting this option means the 'Default PDF Standard' setting in User Settings – Archive Settings will be used.

PDF

Selecting this option means a normal PDF file will be created.

PDF/A-1b

Select this option to produce a PDF file that conforms to the PDF/A-1b standard. The PDF/A-1b standard is a level of PDF/A compliance, which is used for the long-term preservation of digital documents.

Since PDF/A-1b, in its essence, is related to long-term archiving, there are certain requirements and some functionality that is prevented from being applied to the file. For example, PDF passwords are not supported by the PDF/A-1b standard. Also fonts must be embedded into the PDF. As such, when selecting the PDF/A-1b option, the Allow content extraction, Allow changes to document, PDF Password fields and font fields are disabled.

Note: Only the PDF creation library v4.0.207 and later versions support the PDF/A-1b standard. If you attempt to select the PDF/A-1b option with an incompatible library version, you will be warned and advised to change the PDF Creation library to one that is supported.

PDF Creation Library

Spindle Document Distribution is used with a vast variety of documents and there have been occasions where documents have not rendered consistently between versions of the PDF library. The PDF Creation Library choice allows us to move forward by default to the latest version of the library and provide for alternative PDF rendering to be established for any problematic document type.

Note: Please be aware that the v4 PDF libraries offer a higher degree of PDF document protection as they use AES-256 encryption. The v3 PDF libraries use 40-bit RC4 encryption, which is not as up-to-date.

Allow changes to the document

Tick this option to allow the recipient of the PDF file to change the contents of the document.

Allow content extraction

Tick this option to allow the recipient to copy and paste the contents of the PDF file into another package, for example Microsoft Word.

PDF Password

Sets a password on the produced PDF files so that only those who know the required password can open and view the PDF. An example of when this functionality may be used is during a pay run whereby employee payslips are generated with a unique password for each employee and subsequently emailed to them.

There are four options that can be selected from the PDF Password drop down;

- Use ##PDFPASSWORD##
- Enter password manually
- Use manual password if no ##PDFPASSWORD## found
- <None>

These options are detailed below;

Use ##PDFPASSWORD##

Selecting this option means the value assigned to the ##PDFPASSWORD## command will be set as the document password. The password can be assigned to ##PDFPASSWORD## either on the report designer or stored via an External Data Link.

Enter password manually

Select this option to enter a manual password in the PDF Password field. To set a password you can;

- Enter free text for a static password.
- Use ## commands.
- Use a combination of both text and ## commands.

For example:

INV##VAR1##ACC##VAR2##

would set the password as INV0005105ACCABC001 when distributed. (Where INV and ACC are free text and ##VAR1 is 0005105 and ##VAR2## is ABC001.)

The **Show** checkbox when enabled displays the text that has been entered into the password field.

Use manual password if no ##PDFPASSWORD## found

Select this option if you want the manually entered password to be used if a ##PDFPASSWORD## command is not found or not set. Initially, the value assigned to ##PDFPASSWORD## on the report designer or via an external data link will be set as the document password. However, if the ##PDFPASSWORD## command is not present, blank or not set, then the password entered into the PDF password field will be used as the document password.

Note: If both the ##PDFPASSWORD## command and password field are not set, then the distribution will fail.

<NONE>

Selecting this option means that no password will be set on the PDF regardless of what is assigned to the ##PDFPASSWORD## command. **Note:** This is the default option.

Warn user if no ##PDFPASSWORD## found

Tick this option if you want a warning to be displayed during processing to notify the user that no ##PDFPASSWORD## command was found or no value was supplied. By ticking this option you will be warned, however this will not stop the distribution of the PDF.

Note: This option is enabled if you select the option "Use ##PDFPASSWORD##" or "Use manual password if no ##PDFPASSWORD## is found".

Render PDF as image

The documents printed to Spindle Document Distribution are converted into Adobe PDF files and contain complex shading, company branding, images and text. Sometimes not all of these elements can be converted correctly into a format that the PDF understands. This can result in a PDF file that contains invalid text items, corrupted images or some other undesired result. Ticking this option attempts to convert the document correctly by creating each document page as an image. However, the quality of the file is decreased, the file size is increased and the text within the PDF file is not searchable. This option should only be enabled if directed to do so by an authorised Draycir Partner.

Allow font embedding

Font embedding enables Spindle Document Distribution to store the fonts used within the PDF file itself. This enables the person viewing the PDF file to see the text in the original fonts even if that font is not installed on their computer. Embedding fonts within the PDF file will increase its file size. Within each font there is a copyright flag which authorises the distributing of that font. This option will only embed fonts that are authorised for distribution.

Force font embedding

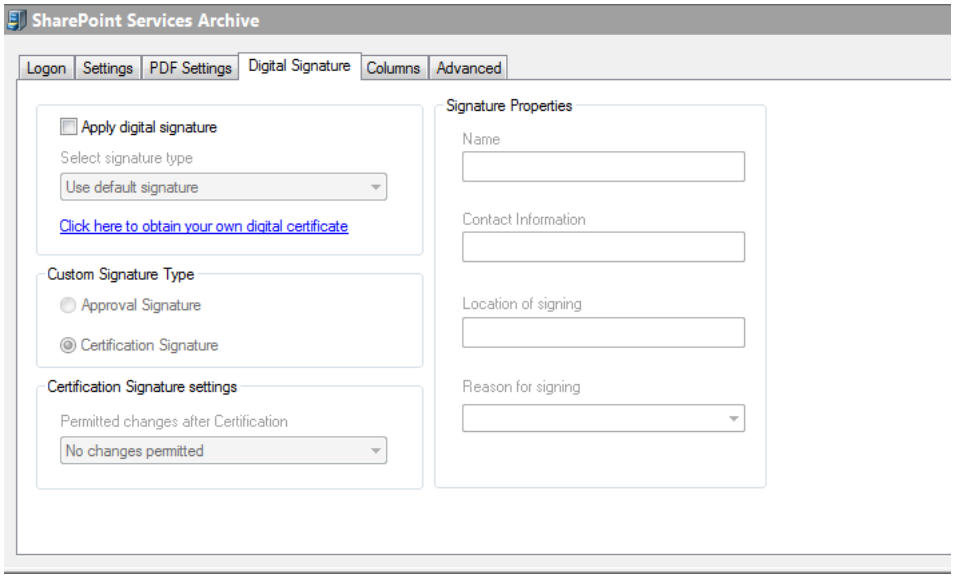
This option works in conjunction with Allow font embedding. Normally, only fonts that are authorised for distribution are embedded into PDF files created by Spindle Document Distribution. However, this option overrides this setting and forces the font to be embedded in to the PDF file. You will need to get permission from the owner of the font you want to embed before you enable this option. **Note: if you enable this setting without obtaining the font owners permission you may be breaking copyright law.**

Embed Unicode font information

Unicode is a technical specification of the amount of space that is required to store a character in any of the world's languages. Tick this option if the PDF file needs to support larger character sets.

7.3.5.4 Digital Signature Tab

The Digital Signature tab provides the facility to electronically sign the PDF files.



SharePoint Services Archive Digital Signature Tab

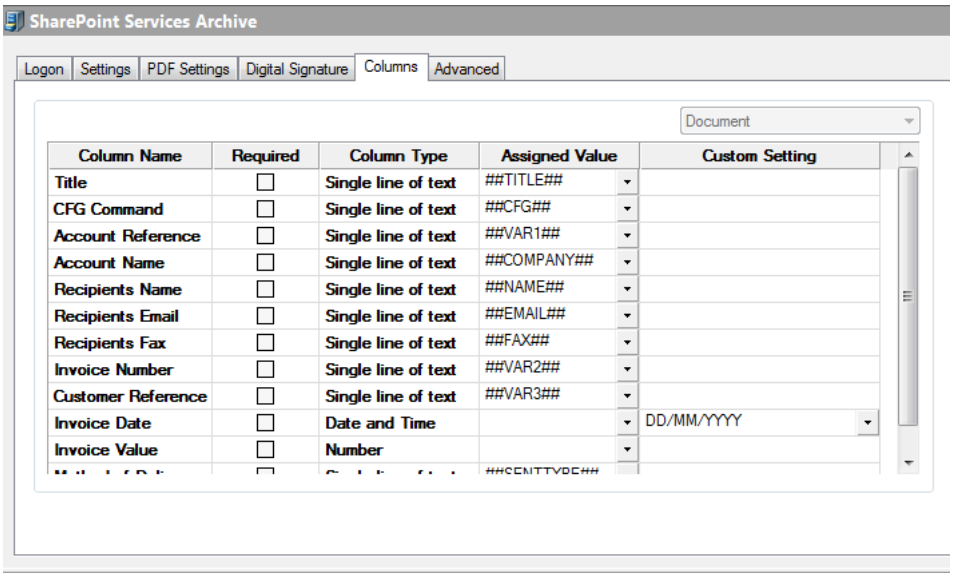
Digital signature

The signature capability within Spindle Document Distribution has been designed to provide Certified Document Services (CDS) through an Adobe CDS provider. A CDS signature certifies to the recipient of the signed PDF that the author's identity has been verified by a trusted organisation and that the document has not been altered. The trusted status of the PDF is displayed in Adobe PDF reading applications, by a blue ribbon or green tick, an information panel and a bar at the top of the screen.

The Digital Signature dialogs used in e-mail and archive settings appear the same as, and inherit default values from the current user's settings. See the User Settings (see page 195) section of the help file for further information.

7.3.5.5 Columns Tab

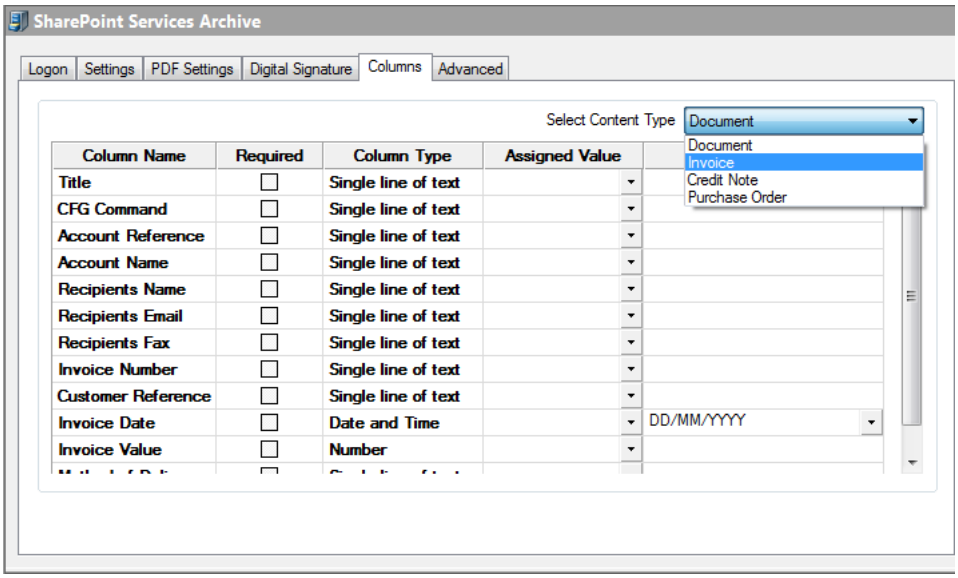
The Columns tab is used to associate Spindle Document Distribution commands to SharePoint columns or 'Meta-data'. When a document is archived into a SharePoint document library, Spindle Document Distribution can populate the columns with data taken from the embedded commands.



SharePoint Services Archive Columns Tab

Document Library

If SharePoint Content Types are available for the Document Library, the Document Library combo box will be enabled and will display a list of available Content Types. When a Content Type is selected from the combo box the columns in the display grid will be updated to include the columns associated with the Content Type.



When selecting different Content Types any columns with the same name as the previous Content Type selection will retain their Assigned Value and Custom Setting.

Column Name

The name of the column in the SharePoint document library. All of the column names are listed here, including columns that are not displayed in any SharePoint views.

Required

This box is ticked if the column is required. If a column is marked as Required then you must supply a value in the Assigned Value box unless a default value has been created in SharePoint. If no value is supplied then SharePoint will reject the document being archived.

Column Type

Shows the column type. This helps you to specify the correct type of data. Types supported by Spindle Document Distribution are:

- Single line of text
- Multiple lines of text
- Number
- Currency
- Date and Time
- Yes/No
- Person or Group
- Choice
- Look Up
- Hyperlink or Picture

Assigned Value

From the drop-down list you can select the Spindle Document Distribution command that will be used to populate the column in SharePoint. You can also type a value directly into the edit box.

When the Column is:

- a Person or Group which supports multiple selections, Spindle Document Distribution only supports the provision of a single value. The value needs to be the fully qualified user account or group name, not a descriptor. For example; domainName\windowsUserloginName.
- a Choice, the value needs to match exactly one of the available choices.
- a Look Up, the value needs to match one of the available primary column choices.
- a Hyperlink or Picture, the value must resolve to a valid URL. An optional description delimited by ", " if provided, is used as the link text. For example; http://website/etc/imageurl, An example image description. Note that the delimiter is COMMA SPACE and the space must be provided.
- Multi Line text, Spindle Document Distribution requires that the CTRL Enter keys are used to denote a new line. There is also a SharePoint setting of "Allow unlimited text length in document libraries" which is not considered by Spindle Document Distribution. If this setting doesn't allow an unlimited length, Spindle Document Distribution will still upload large text strings but these will be trapped when or if, the document data is subsequently edited in SharePoint.

Validation of Assigned Values

It is important to note that if an incorrect or inaccurate Choice or other type of SharePoint data is supplied, SharePoint may initially accept the value and an error not be thrown. However if a user subsequently edits any meta data associated with the document, an incorrect Choice value for example, is overwritten by the default choice configured within SharePoint. This behavior may also be subject to rules and ‘fill in choice’ validation within the SharePoint user interface. Please be aware that such validation is not currently invoked by Spindle Document Distribution. Similar validation issues are found when using "Choose From" and "Required" constraints. Spindle Document Distribution does not currently support the "Allow Multiple Values" option in Choice and Lookup columns.

Custom Setting

This option is only available if the 'Column Type' is of a type 'Date and Time' and is used to tell Spindle Document Distribution the format of the date and time value stored in the Assigned Value command. Select from the drop-down list the format of the date and time that has been used. For example, if the Assigned Value contains ##VAR5## and the value of this command on the document is '16/10/2008', then select 'DD/MM/YYYY'. If the value on the document is 'October 16 2006' then select 'MMMM DD YYYY'.

The meaning of the letters describing a date are as follows:

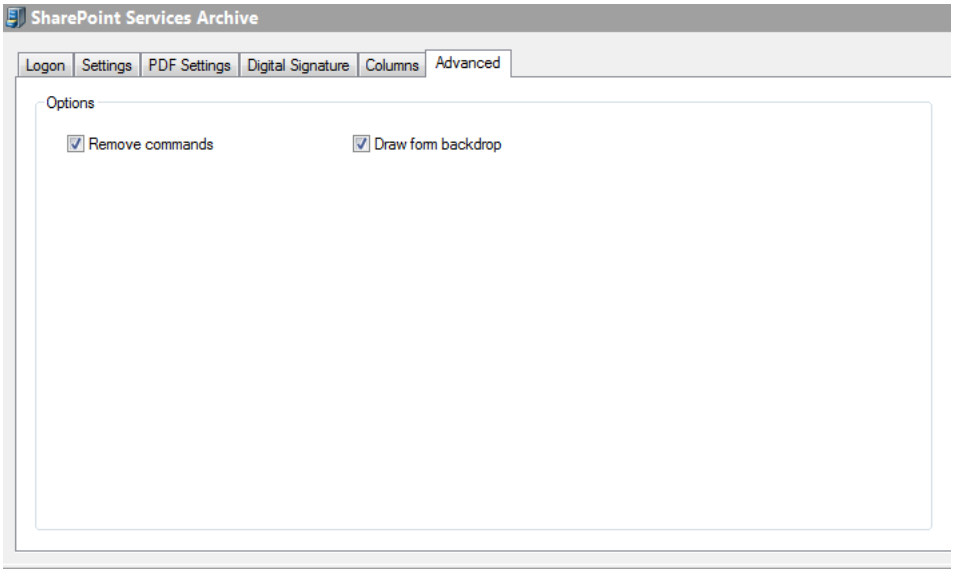
- DD - The day, expressed as a value between 1 and 31
- MM - The month, expressed as a value between 1 and 12
- YY - The year, expressed as a value between 00 and 99
- YYYY - The year, expressed as a value between 1 and 9999
- MMM - The month, expressed in short format, e.g. Jan, Feb, Mar, Apr etc.
- MMMM - The month, expressed in long format, e.g. January, February, March, April etc.
- hh:mm AM - Hours and minutes, expressed in 12 hour AM/PM
- hh:mm - Hours and minutes, expressed in 24 hour

Document Versions in SharePoint

The document being uploaded by Spindle Document Distribution may already exist in SharePoint. If the existing SharePoint document is "Checked Out" as might be reasonably expected, the Spindle Document Distribution upload will fail. Also Spindle Document Distribution does not support the upgrading of a minor version of a document to a major version.

7.3.5.6 Advanced Tab

Advanced settings should only be changed by an experienced Spindle Document Distribution installer.



SharePoint Services Archive Advanced Tab

Remove commands

This option removes the Spindle Document Distribution embedded commands from the document before archiving the file.

To leave the commands in the archived document untick this option. Default setting is ticked (remove the commands).

Draw form backdrop

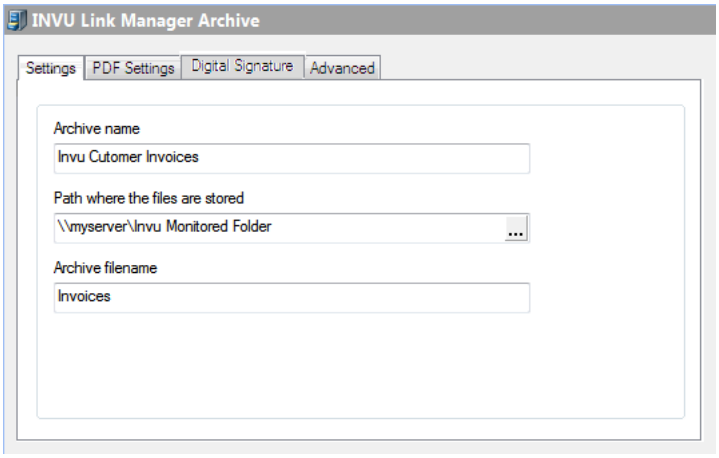
Saves the PDF file with the forms that have been selected in the document operation. To reduce the size of the PDF file you can untick this option which will create the PDF file without any forms. Default setting is ticked.

7.3.6 INVU Link Manager Archive

Invu is a 3rd party document archiving system. The device enables you to archive your documents into Invu using the Invu Link Manager application. This devices saves the PDF files in a given location on your network and adds an entry to a single CSV file. The Invu Link Manager monitors this location and detects when the CSV file contains new information. It will then use the information contained within the CSV file to index the PDF files into the Invu system.

7.3.6.1 Settings Tab

This page is where you configure the main settings for an archive, it's name and file generation information.



INVU Link Manager Archive Settings Tab

Archive Name

The name of the archive entry. This is the name displayed when choosing the archive in a Document Operation (see page 61).

Path where the files are stored

Points to the directory path where the PDF files and the CSV file (see Advanced Tab (see page 100)) are created. You can select the path by pressing the ... button which will display a **Browse for Folder** dialog box.

You can build up the path using Spindle Document Distribution commands such as ##COMPANY, ##VAR etc. When processing a document and the path does not exist, Spindle Document Distribution will automatically create the directory structure. This path should be the same location that the Invu Link Manager has been told to monitor.

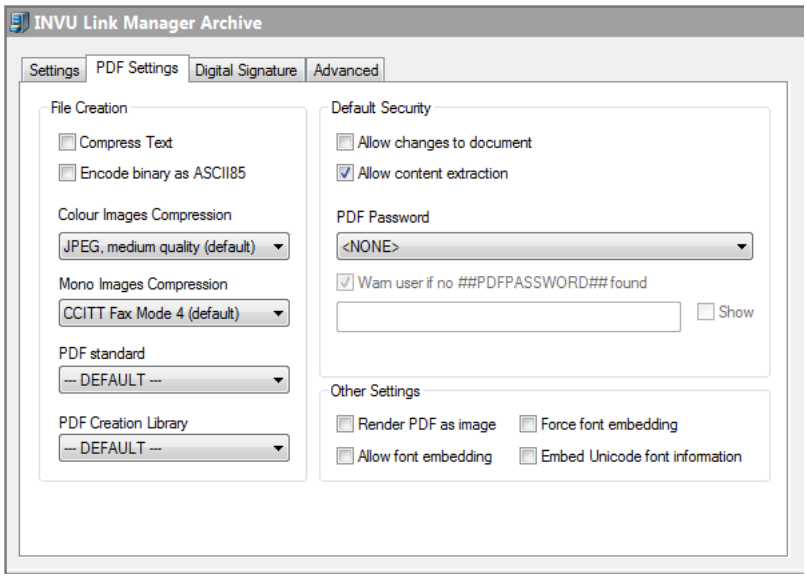
Archive filename

The name of the CSV file that will be created. You can build up the filename by using Spindle Document Distribution commands. **Note:** Do not include the extension part of the file name, i.e. '.CSV', as this is automatically added by Spindle Document Distribution.

The name of the CSV file should match the one that the INVU Link Manager has been told to monitor. Spindle Document Distribution will create PDF files with randomly generated filenames in the path specified. When the PDF has been created Spindle Document Distribution will add an entry to the CSV file.

7.3.6.2 PDF Settings Tab

The PDF settings tab allows you to alter the parameters for the creation of PDF files. By default Spindle Document Distribution has already selected the most reasonable settings to maximise quality yet still produce reasonable sized PDF files.



PDF Settings Tab

Compress Text

Tick to compress the text within the PDF file. This should result in a smaller file size.

Encode binary as ASCII85

Ticking this option will encode information in the ASCII format. This will result in a larger file size.

Colour Images Compression

Sets the compression rate for colour images within the PDF file. A higher compression rate will reduce the file size but will also result in lower image quality.

Mono Images Compression

Sets the compression rate for mono images within the PDF file.

PDF Standard

This sets the PDF standard to be used on the processed document that is produced by Spindle Document Distribution. There are three options that can be selected from the PDF Standard drop down. These options are;

---DEFAULT---

Selecting this option means the ‘Default PDF Standard’ setting in User Settings – Archive Settings will be used.

PDF

Selecting this option means a normal PDF file will be created.

PDF/A-1b

Select this option to produce a PDF file that conforms to the PDF/A-1b standard. The PDF/A-1b standard is a level of PDF/A compliance, which is used for the long-term preservation of digital documents.

Since PDF/A-1b, in its essence, is related to long-term archiving, there are certain requirements and some functionality that is prevented from being applied to the file. For example, PDF passwords are not supported by the PDF/A-1b standard. Also fonts must be embedded into the PDF. As such, when selecting the PDF/A-1b option, the Allow content extraction, Allow changes to document, PDF Password fields and font fields are disabled.

Note: Only the PDF creation library v4.0.207 and later versions support the PDF/A-1b standard. If you attempt to select the PDF/A-1b option with an incompatible library version, you will be warned and advised to change the PDF Creation library to one that is supported.

PDF Creation Library

Spindle Document Distribution is used with a vast variety of documents and there have been occasions where documents have not rendered consistently between versions of the PDF library. The PDF Creation Library choice allows us to move forward by default, to the latest version of the library and provide for alternative PDF rendering to be established for any problematic document type.

Note: Please be aware that the v4 PDF libraries offer a higher degree of PDF document protection as they use AES-256 encryption. The v3 PDF libraries use 40-bit RC4 encryption, which is not as up-to-date.

Allow changes to the document

Tick this option to allow the recipient of the PDF file to change the contents of the document.

Allow content extraction

Tick this option to allow the recipient to copy and paste the contents of the PDF file into another package, for example Microsoft Word.

PDF Password

Sets a password on the produced PDF files so that only those who know the required password can open and view the PDF. An example of when this functionality may be used is during a pay run whereby employee payslips are generated with a unique password for each employee and subsequently emailed to them.

There are four options that can be selected from the PDF Password drop down;

- Use ##PDFPASSWORD##
- Enter password manually
- Use manual password if no ##PDFPASSWORD## found
- <None>

These options are detailed below;

Use ##PDFPASSWORD##

Selecting this option means the value assigned to the ##PDFPASSWORD## command will be set as the document password. The password can be assigned to ##PDFPASSWORD## either on the report designer or stored via an External Data Link.

Enter password manually

Select this option to enter a manual password in the PDF Password field. To set a password you can;

- Enter free text for a static password.

- Use ## commands.
- Use a combination of both text and ## commands.

For example:

INV##VAR1##ACC##VAR2##

would set the password as INV0005105ACCABC001 when distributed. (Where INV and ACC are free text and ##VAR1 is 0005105 and ##VAR2## is ABC001.)

The **Show** checkbox when enabled displays the text that has been entered into the password field.

Use manual password if no ##PDFPASSWORD## found

Select this option if you want the manually entered password to be used if a ##PDFPASSWORD## command is not found or not set. Initially, the value assigned to ##PDFPASSWORD## on the report designer or via an external data link will be set as the document password. However, if the ##PDFPASSWORD## command is not present, blank or not set, then the password entered into the PDF password field will be used as the document password.

Note: If both the ##PDFPASSWORD## command and password field are not set, then the distribution will fail.

<NONE>

Selecting this option means that no password will be set on the PDF regardless of what is assigned to the ##PDFPASSWORD## command. **Note:** This is the default option.

Warn user if no ##PDFPASSWORD## found

Tick this option if you want a warning to be displayed during processing to notify the user that no ##PDFPASSWORD## command was found or no value was supplied. By ticking this option you will be warned, however this will not stop the distribution of the PDF.

Note: This option is enabled if you select the option "Use ##PDFPASSWORD##" or "Use manual password if no ##PDFPASSWORD## is found".

Render PDF as image

The documents printed to Spindle Document Distribution are converted into Adobe PDF files and contain complex shading, company branding, images and text. Sometimes not all of these elements can be converted correctly into a format that the PDF understands. This can result in a PDF file that contains invalid text items, corrupted images or some other undesired result. Ticking this option attempts to convert the document correctly by creating each document page as an image. However, the quality of the file is decreased, the file size is increased and the text within the PDF file is not searchable. This option should only be enabled if directed to do so by an authorised Draycir Partner.

Allow font embedding

Font embedding enables Spindle Document Distribution to store the fonts used within the PDF file itself. This enables the person viewing the PDF file to see the text in the original fonts even if that font is not installed on their computer. Embedding fonts within the PDF file will increase its file size. Within each font there is a copyright flag which authorises the distributing of that font. This option will only embed fonts that are authorised for distribution.

Force font embedding

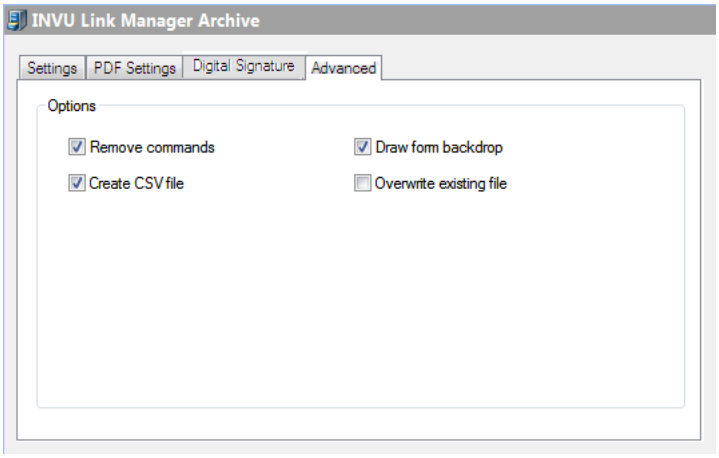
This option works in conjunction with Allow font embedding. Normally, only fonts that are authorised for distribution are embedded into PDF files created by Spindle Document Distribution. However, this option overrides this setting and forces the font to be embedded in to the PDF file. You will need to get permission from the owner of the font you want to embed before you enable this option. **Note: if you enable this setting without obtaining the font owners permission you may be breaking copyright law.**

Embed Unicode font information

Unicode is a technical specification of the amount of space that is required to store a character in any of the world's languages. Tick this option if the PDF file needs to support larger character sets.

7.3.6.3 Advanced Tab

Advanced settings should only be changed by an experienced Spindle Document Distribution installer.



Advanced Tab

Remove commands

This option removes the Spindle Document Distribution embedded commands from the document before archiving the file. To leave the commands in the archived document untick this option. Default setting is ticked (remove the commands).

Draw form backdrop

Saves the PDF file with the forms that have been selected in the document operation. To reduce the size of the PDF file you can untick this option which will create the PDF file without any forms. Default setting is ticked.

Create CSV file

Creates a CSV (Comma Separated Values) file containing an entry for each PDF document created along with all the commands extracted from the document. The name of the CSV file will be the name specified in the Settings Tab with a '.CSV' extension. Default setting is ticked.

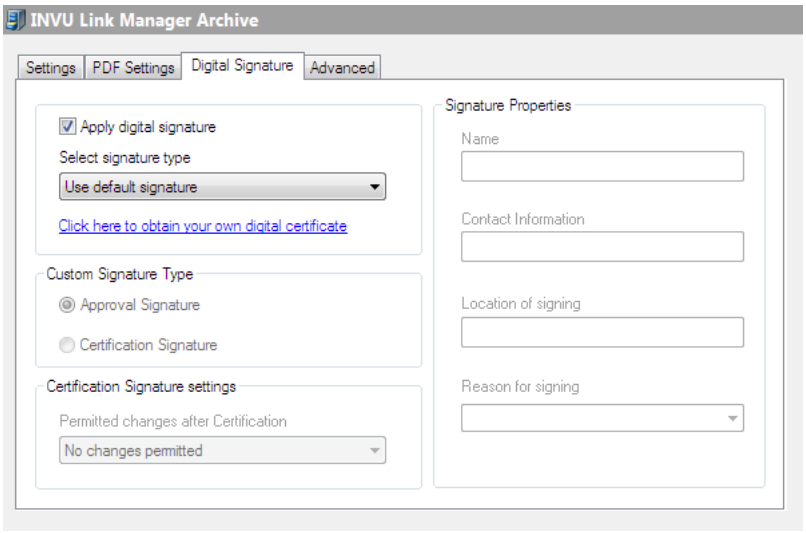
The CSV file is monitored and read by the INVU Link Manager. Once the INVU Link Manager has processed the CSV file and PDF files it will delete the files as they would have been successfully archived in the INVU document management system.

Overwrite existing file

This option is ignored and not used.

7.3.6.4 Digital Signature Tab

The Digital Signature tab provides the facility to electronically sign PDF files.



Digital Signature Tab

Digital signature

The signature capability within Spindle Document Distribution has been designed to provide Certified Document Services (CDS) through an Adobe CDS provider. A CDS signature certifies to the recipient of the signed PDF that the author's identity has been verified by a trusted organisation and that the document has not been altered. The trusted status of the PDF is displayed in Adobe PDF reading applications, by a blue ribbon or green tick, an information panel and a bar at the top of the screen.

The Digital Signature dialogs used in e-mail and archive settings appear the same as, and inherit default values from the current user's settings. See the User Settings (see page 195) section of the help file for further information.

7.3.7 Spindle Document Capture Archive

Spindle Document Capture is Draycir's document archiving solution. Here we enable Spindle Document Distribution to pass PDF copies of your documents into the Spindle Document Capture either directly (if providing data to enable association of the document to objects in the host system), or to the Spindle Document Capture Pending Tray where appropriate associations can be made later. Once these documents are archived, you will be able to retrieve and view these from within your host system (if compatible with Spindle Document Capture).

The data required to make the association is defined in Spindle Document Capture and is Document Type specific. The Document Types you will see in the **Document Type** drop down list on the configuration tab will be determined by Spindle Document Capture.

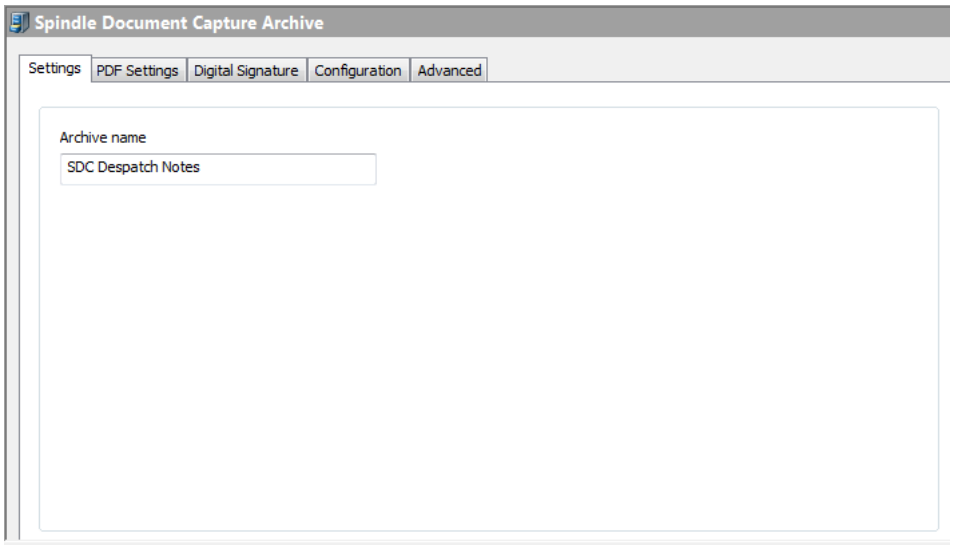
Note: Prior to configuring your archive device you must configure the connection details to your Spindle Document Capture server (see page 203).

7.3.7.1 Settings Tab

The Settings Tab is where the archive name and connection properties to the Spindle Document Capture server can be configured.

Note: The Spindle Document Capture server connection properties are global settings which are held in User Settings > Spindle Document Capture Settings (see page 203). Any changes to these settings will be made global, and will apply to

all your Spindle Document Capture archives and to any ##SDCATTACH commands used on your documents.



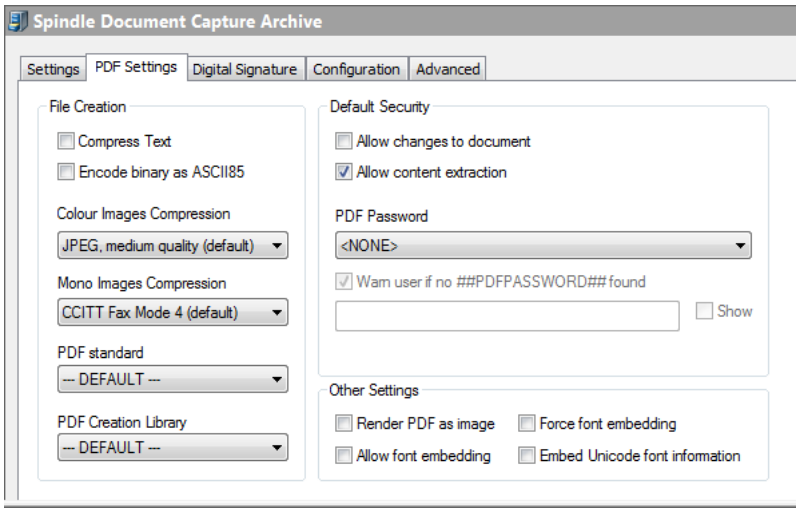
Spindle Document Capture Archive Settings Tab

Archive name

The name of the archive entry. This is the name displayed when choosing the archive in a Document Operation (see page 61).

7.3.7.2 PDF Settings Tab

The PDF settings tab allows you to alter the parameters for the creation of PDF files. By default Spindle Document Distribution has already selected the most reasonable settings to maximise quality yet still produce reasonable sized PDF files.



PDF Settings Tab

Compress Text

Tick to compress the text within the PDF file. This should result in a smaller file size.

Encode binary as ASCII85

Ticking this option will encode information in the ASCII format. This will result in a larger file size.

Colour Images Compression

Sets the compression rate for colour images within the PDF file. A higher compression rate will reduce the file size but will also result in lower image quality.

Mono Images Compression

Sets the compression rate for mono images within the PDF file.

PDF Standard

This sets the PDF standard to be used on the processed document that is produced by Spindle Document Distribution. There are three options that can be selected from the PDF Standard drop down. These options are;

---DEFAULT---

Selecting this option means the 'Default PDF Standard' setting in User Settings – Archive Settings will be used.

PDF

Selecting this option means a normal PDF file will be created.

PDF/A-1b

Select this option to produce a PDF file that conforms to the PDF/A-1b standard. The PDF/A-1b standard is a level of PDF/A compliance, which is used for the long-term preservation of digital documents.

Since PDF/A-1b, in its essence, is related to long-term archiving, there are certain requirements and some functionality that is prevented from being applied to the file. For example, PDF passwords are not supported by the PDF/A-1b standard. Also fonts must be embedded into the PDF. As such, when selecting the PDF/A-1b option, the Allow content extraction, Allow changes to document, PDF Password fields and font fields are disabled.

Note: Only the PDF creation library v4.0.207 and later versions support the PDF/A-1b standard. If you attempt to select the PDF/A-1b option with an incompatible library version, you will be warned and advised to change the PDF Creation library to one that is supported.

PDF Creation Library

Spindle Document Distribution is used with a vast variety of documents and there have been occasions where documents have not rendered consistently between versions of the PDF library. The PDF Creation Library choice allows us to move forward by default to the latest version of the library and provide for alternative PDF rendering to be established for any problematic document type.

Note: Please be aware that the v4 PDF libraries offer a higher degree of PDF document protection as they use AES-256 encryption. The v3 PDF libraries use 40-bit RC4 encryption, which is not as up-to-date.

Allow changes to the document

Tick this option to allow the recipient of the PDF file to change the contents of the document.

Allow content extraction

Tick this option to allow the recipient to copy and paste the contents of the PDF file into another package, for example Microsoft Word.

PDF Password

Sets a password on the produced PDF files so that only those who know the required password can open and view the PDF. An example of when this functionality may be used is during a pay run whereby employee payslips are generated with a unique password for each employee and subsequently emailed to them.

There are four options that can be selected from the PDF Password drop down;

- Use ##PDFPASSWORD##
- Enter password manually
- Use manual password if no ##PDFPASSWORD## found
- <None>

These options are detailed below;

Use ##PDFPASSWORD##

Selecting this option means the value assigned to the ##PDFPASSWORD## command will be set as the document password. The password can be assigned to ##PDFPASSWORD## either on the report designer or stored via an External Data Link.

Enter password manually

Select this option to enter a manual password in the PDF Password field. To set a password you can;

- Enter free text for a static password.
- Use ## commands.
- Use a combination of both text and ## commands.

For example:

INV##VAR1##ACC##VAR2##

would set the password as INV0005105ACCABC001 when distributed. (Where INV and ACC are free text and ##VAR1 is 0005105 and ##VAR2## is ABC001.)

The **Show** checkbox when enabled displays the text that has been entered into the password field.

Use manual password if no ##PDFPASSWORD## found

Select this option if you want the manually entered password to be used if a ##PDFPASSWORD## command is not found or not set. Initially, the value assigned to ##PDFPASSWORD## on the report designer or via an external data link will be set as the document password. However, if the ##PDFPASSWORD## command is not present, blank or not set, then the password entered into the PDF password field will be used as the document password.

Note: If both the ##PDFPASSWORD## command and password field are not set, then the distribution will fail.

<NONE>

Selecting this option means that no password will be set on the PDF regardless of what is assigned to the ##PDFPASSWORD## command. **Note:** This is the default option.

Warn user if no ##PDFPASSWORD## found

Tick this option if you want a warning to be displayed during processing to notify the user that no ##PDFPASSWORD## command was found or no value was supplied. By ticking this option you will be warned, however this will not stop the

distribution of the PDF.

Note: This option is enabled if you select the option "Use ##PDFPASSWORD##" or "Use manual password if no ##PDFPASSWORD## is found".

Render PDF as image

The documents printed to Spindle Document Distribution are converted into Adobe PDF files and contain complex shading, company branding, images and text. Sometimes not all of these elements can be converted correctly into a format that the PDF understands. This can result in a PDF file that contains invalid text items, corrupted images or some other undesired result. Ticking this option attempts to convert the document correctly by creating each document page as an image. However, the quality of the file is decreased, the file size is increased and the text within the PDF file is not searchable. This option should only be enabled if directed to do so by an authorised Draycir Partner.

Allow font embedding

Font embedding enables Spindle Document Distribution to store the fonts used within the PDF file itself. This enables the person viewing the PDF file to see the text in the original fonts even if that font is not installed on their computer. Embedding fonts within the PDF file will increase its file size. Within each font there is a copyright flag which authorises the distributing of that font. This option will only embed fonts that are authorised for distribution.

Force font embedding

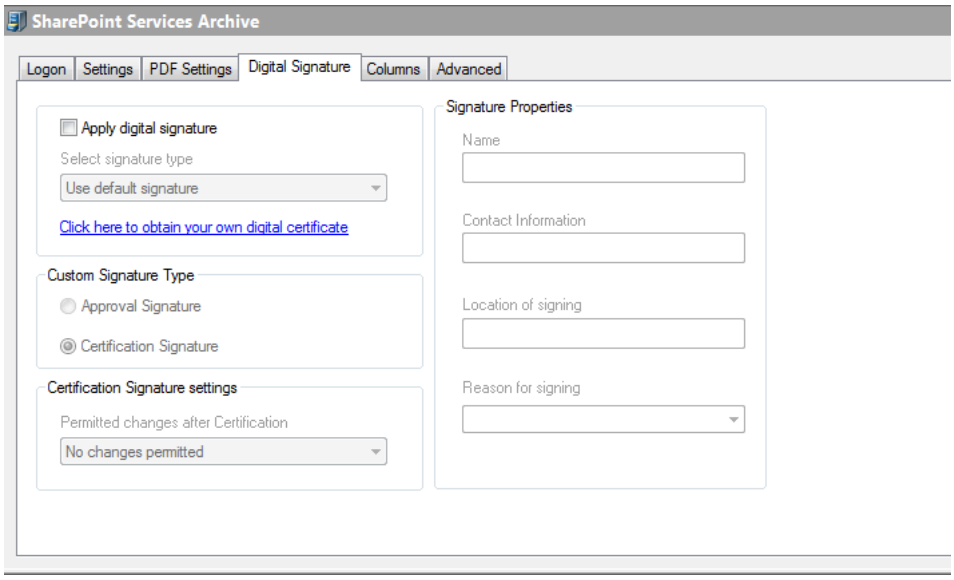
This option works in conjunction with Allow font embedding. Normally, only fonts that are authorised for distribution are embedded into PDF files created by Spindle Document Distribution. However, this option overrides this setting and forces the font to be embedded in to the PDF file. You will need to get permission from the owner of the font you want to embed before you enable this option. **Note: if you enable this setting without obtaining the font owners permission you may be breaking copyright law.**

Embed Unicode font information

Unicode is a technical specification of the amount of space that is required to store a character in any of the world's languages. Tick this option if the PDF file needs to support larger character sets.

7.3.7.3 Digital Signature Tab

The Digital Signature tab provides the facility to electronically sign the PDF files.



Digital Signature Tab

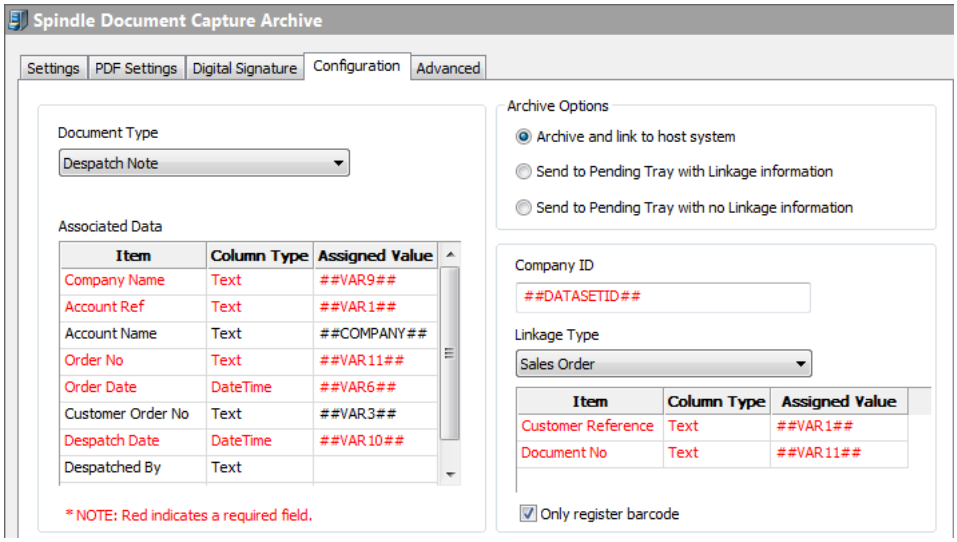
Digital signature

The signature capability within Spindle Document Distribution has been designed to provide Certified Document Services (CDS) through an Adobe CDS provider. A CDS signature certifies to the recipient of the signed PDF that the author's identity has been verified by a trusted organisation and that the document has not been altered. The trusted status of the PDF is displayed in Adobe PDF reading applications, by a blue ribbon or green tick, an information panel and a bar at the top of the screen.

The Digital Signature dialogs used in e-mail and archive settings appear the same as, and inherit default values from the current user's settings. See the User Settings (see page 195) section of the help file for further information.

7.3.7.4 Configuration Tab

Spindle Document Capture Archive Data Configuration



Document Type

Document Types define how documents will be retained in the archive and provide Spindle Document Capture with the ability to handle different Document Types in different ways.

The drop down displays the Document Types configured within Spindle Document Capture and when one is selected, the Associated Data and Linkage Type(s) defined on the Document Type in Spindle Document Capture are displayed.

Associated Data

Associated Data will be stored in Spindle Document Capture and held against the documents archived. The information is usually pulled from the host system via the report layouts, and may if the host system information is changed, become out of date or incorrect as it is a real-time snapshot. With this information held in Spindle Document Capture, it allows users of Spindle Document Capture to search for this data to retrieve documents. This information will not affect the association of documents to the host system, however the data items that are defined as mandatory in Spindle Document Capture are highlighted in red and must be provided.

Item

The name of the data item property.

Column Type

Describes the format of the data item.

Assigned Value

Use any combination of ## variables to take data from the host system, or hard-code values to populate the data item property.

Archive Options

Here you are able to define if the documents being processed by Spindle Document Distribution are to be sent to Spindle Document Capture for archival and associated to host system, or if the documents are to be sent to the Pending Tray (with or without the Associated Data and Linkage information).

Archive and link to host system

The linkage information defined under Linkage Type will be retained in association with the document. The linkage information is used to associate the archived document to the Linkage Type object within the host system such that the document can be located efficiently from the host system.

Send to Pending Tray with Linkage information

The document will be moved to a special area within Spindle Document Capture known as the "Pending Tray" where an Spindle Document Capture user will be able to check the information and archive from within the Pending Tray, or archive and link the document in the host system manually at a later date.

Send to Pending Tray with no Linkage information

The document will be moved to a special area within Spindle Document Capture known as the "Pending Tray" where an Spindle Document Capture user will be able to archive and link the document in the host system manually at a later date.

Company ID

In order to associate the document to the correct company within the host system, Spindle Document Capture will require you to specify the Company ID. If this archive is to be used for 1 company only, you can hard-code the value or you can use a ## variable to retrieve this data from your report layout (mapped as ##DATASETID## above).

Linkage Type

The Linkage Type defines the type of "object" within the host system that the document is to be associated with. For example in an accounting system a document such as a Despatch Note will be associated to a Sales Order, whereas a Sales Invoice document would be associated to the Customer Transaction.

Item

The name of the data item properties that are required by Spindle Document Capture in order to associate the document to the correct "object" (as selected in the Linkage Type drop down) in the host system. The items highlighted in red are mandatory and must be provided. **Note:** if the information provided is incorrect, the documents will not be visible in the host system.

Column Type

Describes the format of the data item.

Assigned Value

Use any combination of ## variables to take data from the host system, or hard-code values to populate the data item property.

Only register barcode

If you do not want to archive the document in Spindle Document Capture when it is processed by Spindle Document Distribution, but you only require Spindle Document Capture to register the barcode, please tick 'Only register barcode'.

Sage 200 layouts with Spindle Document Capture commands

You can install a Sage 200 Add-On package supplied with the Spindle Document Distribution installer, which deploys a set

of custom layout files with the necessary Spindle Document Capture commands pre-populated on the layouts. Within the 200 System Administration tool > Add-Ons menu, add the following package from the Spindle Document Management server using the Simple Mode:

- C:\Program Files (x86)\Draycir\Spindle Document Distribution\Add-Ons\Sage 200\

There will be a separate folder for each supported version of Sage 200, open the appropriate version folder. Select the Spindle Custom Layouts.sdbx package. The layout files will be deployed to the custom layouts folder on the default Sage path.

The following layouts are provided with Spindle Document Capture archive commands:

- SOP Invoice (Single)
- SOP Order Acknowledgement (Single)
- SOP Despatch Note (Single)
- Sales Ledger Statement with Advice (Single)
- Purchase Ledger Remittance Advice (Single)
- POP Purchase Order (Single)

Mapping ##DATASETID## / Company ID on layout

If using Sage 200 2013 or 2015

The following command is already populated on the layouts supplied:

“##DATASETID " + SYSCompanies.CompanyNumber + "##"

If using Sage 200 2010 or 2011

SYSCompanies.CompanyNumber was not exposed.

A suggested solution would be to use the DateTimeCreated field on the SYSCompanies table, and map the DATASETID against this value.

In SQL Server Management Studio:

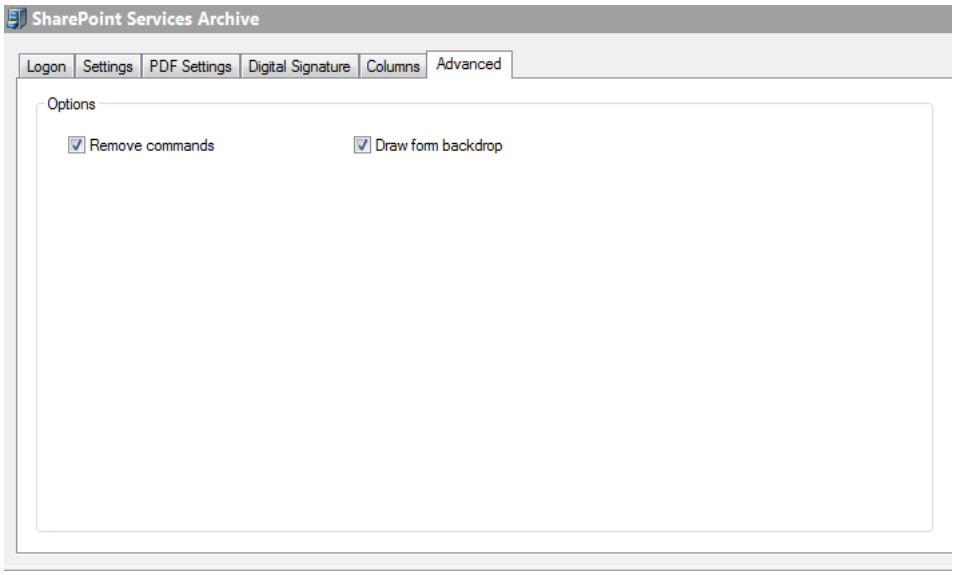
- Open the Company database
- On the SYSCompany table, make a note of the DateTimeCreated value
- Convert the dates to the format yyyyMMddHHmmss. e.g. ‘15/06/2009 15:18:52’ becomes ‘20090615151852’.
- Once you have all of your dates in that format, you assign each of those to the appropriate DATASETID. The DATASETID can be retrieved from Sage200Configuration.tblCompany – CompanyID field.

Example expression to be added to your Sage 200 2010 or 2011 layouts (where '6' and '5' are examples of Company ID's):

"##DATASETID " + (DateTimeToFormattedString(SYSCompanies.DateTimeCreated, "yyyyMMddHHmmss") = "20090615151852" ? 6: DateTimeToFormattedString(SYSCompanies.DateTimeCreated, "yyyyMMddHHmmss") = "20100615151852" ? 5: DateTimeToFormattedString(SYSCompanies.DateTimeCreated, "yyyyMMddHHmmss")) + "##"

7.3.7.5 Advanced Tab

Advanced settings should only be changed by an experienced Spindle Document Distribution installer.



Advanced Tab

Remove commands

This option removes the Spindle Document Distribution embedded commands from the document before archiving the file. To leave the commands in the archived document untick this option. Default setting is ticked (remove the commands).

Draw form backdrop

Saves the PDF file with the forms that have been selected in the document operation. To reduce the size of the PDF file you can untick this option which will create the PDF file without any forms. Default setting is ticked.

7.3.8 Sage 200 2013+ Archive

Starting with Sage 200 2013 (both on-premise and online), using this device allows you to archive your documents against either the Sales or Purchase account. These files are then retrievable via the Attachments tab in Sage 200. **Note:** Earlier versions of Sage 200 are not compatible with this device.

To enable Sage 200 2013+ archiving, you will require the following ## variables on your report layouts:

- ##DATASETID##

In order to associate the document to the correct company within Sage 200 2013, you must specify the Company ID (as held in Sage 200).

- ##ACCOUNTTYPE##

You must specify if the document is to be associated to a Sales Ledger or the Purchase Ledger account by mapping the ##ACCOUNTTYPE variable to either "Sales" or "Purchase".

- ##ACCOUNTREF##

In order to associate the document to the correct account in Sage 200 2013, you must specify the account reference.

The DATASETID and ACCOUNTTYPE commands should be pre-configured as:

- "##DATASETID + SYSCompanies.CompanyNumber + ##"

- "##ACCOUNTTYPE + "Sales" + ##" or "##ACCOUNTTYPE + "Purchase" + ##"

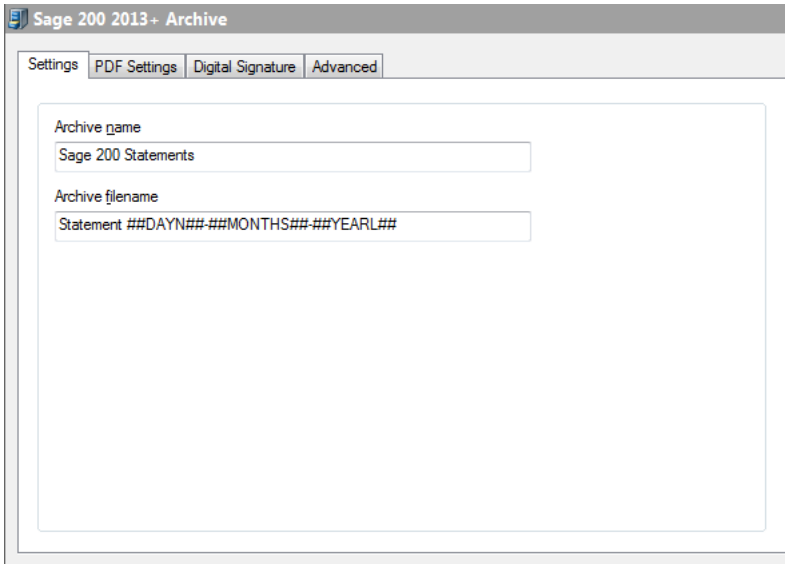
The ACCOUNTREF must be entered onto your report layouts.

SL Example:

- "##ACCOUNTREF + SLCustomerAccounts.CustomerAccountNumber + ##"

7.3.8.1 Settings Tab

This page is where you configure the main settings for an archive, it's name and file generation information.



Settings Tab

Archive name

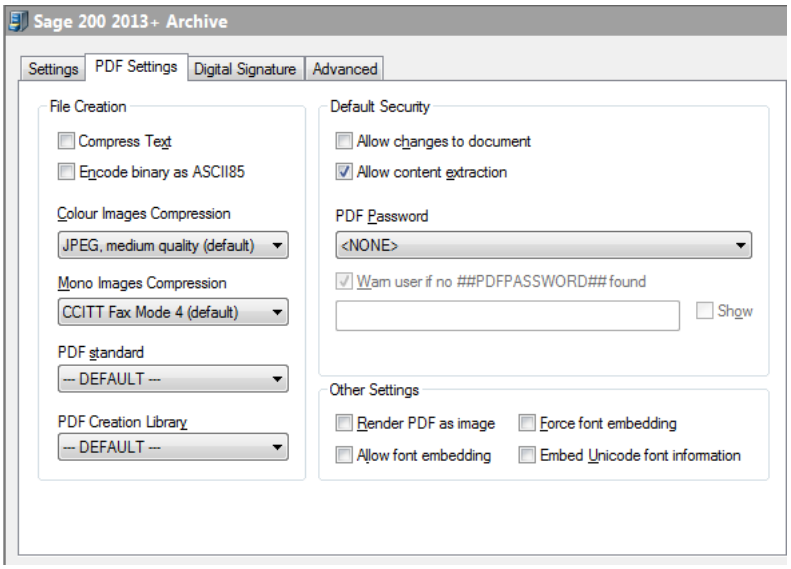
The name of the archive entry. This is the name displayed when choosing the archive in a Document Operation (see page 61).

Archive filename

The name of the PDF file that will be created. You can also build up the filename by using Spindle Document Distribution commands. **Note:** Do not enter the extension part of the file name, i.e. '.PDF', as this is automatically added by Spindle Document Distribution.

7.3.8.2 PDF Settings Tab

The PDF settings tab allows you to alter the parameters for the creation of PDF files. By default Spindle Document Distribution has already selected the most reasonable settings to maximise quality yet still produce reasonably sized PDF files.



PDF Settings Tab

Compress Text

Tick to compress the text within the PDF file. This should result in a smaller file size.

Encode binary as ASCII85

Ticking this option will encode information in the ASCII format. This will result in a larger file size.

Colour Images Compression

Sets the compression rate for colour images within the PDF file. A higher compression rate will reduce the file size but will also result in lower image quality.

Mono Images Compression

Sets the compression rate for mono images within the PDF file.

PDF Standard

This sets the PDF standard to be used on the processed document that is produced by Spindle Document Distribution. There are three options that can be selected from the PDF Standard drop down. These options are;

---DEFAULT---

Selecting this option means the 'Default PDF Standard' setting in User Settings – Archive Settings will be used.

PDF

Selecting this option means a normal PDF file will be created.

PDF/A-1b

Select this option to produce a PDF file that conforms to the PDF/A-1b standard. The PDF/A-1b standard is a level of PDF/A compliance, which is used for the long-term preservation of digital documents.

Since PDF/A-1b, in its essence, is related to long-term archiving, there are certain requirements and some functionality that is prevented from being applied to the file. For example, PDF passwords are not supported by the PDF/A-1b standard. Also fonts must be embedded into the PDF. As such, when selecting the PDF/A-1b option, the Allow content extraction, Allow changes to document, PDF Password fields and font fields are disabled.

Note: Only the PDF creation library v4.0.207 and later versions support the PDF/A-1b standard. If you attempt to select the PDF/A-1b option with an incompatible library version, you will be warned and advised to change the PDF Creation library to

one that is supported.

PDF Creation Library

Spindle Document Distribution is used with a vast variety of documents and there have been occasions where documents have not rendered consistently between versions of the PDF library. The PDF Creation Library choice allows us to move forward by default, to the latest version of the library and provide for alternative PDF rendering to be established for any problematic document type.

Note: Please be aware that the v4 PDF libraries offer a higher degree of PDF document protection as they use AES-256 encryption. The v3 PDF libraries use 40-bit RC4 encryption, which is not as up-to-date.

Allow changes to the document

Tick this option to allow the recipient of the PDF file to change the contents of the document.

Allow content extraction

Tick this option to allow the recipient to copy and paste the contents of the PDF file into another package, for example Microsoft Word.

PDF Password

Sets a password on the produced PDF files so that only those who know the required password can open and view the PDF. An example of when this functionality may be used is during a pay run whereby employee payslips are generated with a unique password for each employee and subsequently emailed to them.

There are four options that can be selected from the PDF Password drop down;

- Use ##PDFPASSWORD##
- Enter password manually
- Use manual password if no ##PDFPASSWORD## found
- <None>

These options are detailed below;

Use ##PDFPASSWORD##

Selecting this option means the value assigned to the ##PDFPASSWORD## command will be set as the document password. The password can be assigned to ##PDFPASSWORD## either on the report designer or stored via an External Data Link.

Enter password manually

Select this option to enter a manual password in the PDF Password field. To set a password you can;

- Enter free text for a static password.
- Use ## commands.
- Use a combination of both text and ## commands.

For example:

INV##VAR1##ACC##VAR2##

would set the password as INV0005105ACCABC001 when distributed. (Where INV and ACC are free text and ##VAR1 is 0005105 and ##VAR2## is ABC001.)

The **Show** checkbox when enabled displays the text that has been entered into the password field.

Use manual password if no ##PDFPASSWORD## found

Select this option if you want the manually entered password to be used if a ##PDFPASSWORD## command is not found or not set. Initially, the value assigned to ##PDFPASSWORD## on the report designer or via an external data link will be set as the document password. However, if the ##PDFPASSWORD## command is not present, blank or not set, then the password entered into the PDF password field will be used as the document password.

Note: If both the ##PDFPASSWORD## command and password field are not set, then the distribution will fail.

<NONE>

Selecting this option means that no password will be set on the PDF regardless of what is assigned to the ##PDFPASSWORD## command. **Note:** This is the default option.

Warn user if no ##PDFPASSWORD## found

Tick this option if you want a warning to be displayed during processing to notify the user that no ##PDFPASSWORD## command was found or no value was supplied. By ticking this option you will be warned, however this will not stop the distribution of the PDF.

Note: This option is enabled if you select the option "Use ##PDFPASSWORD##" or "Use manual password if no ##PDFPASSWORD## is found".

Render PDF as image

The documents printed to Spindle Document Distribution are converted into Adobe PDF files and contain complex shading, company branding, images and text. Sometimes not all of these elements can be converted correctly into a format that the PDF understands. This can result in a PDF file that contains invalid text items, corrupted images or some other undesired result. Ticking this option attempts to convert the document correctly by creating each document page as an image. However, the quality of the file is decreased, the file size is increased and the text within the PDF file is not searchable. This option should only be enabled if directed to do so by an authorised Draycir Partner.

Allow font embedding

Font embedding enables Spindle Document Distribution to store the fonts used within the PDF file itself. This enables the person viewing the PDF file to see the text in the original fonts even if that font is not installed on their computer. Embedding fonts within the PDF file will increase its file size. Within each font there is a copyright flag which authorises the distributing of that font. This option will only embed fonts that are authorised for distribution.

Force font embedding

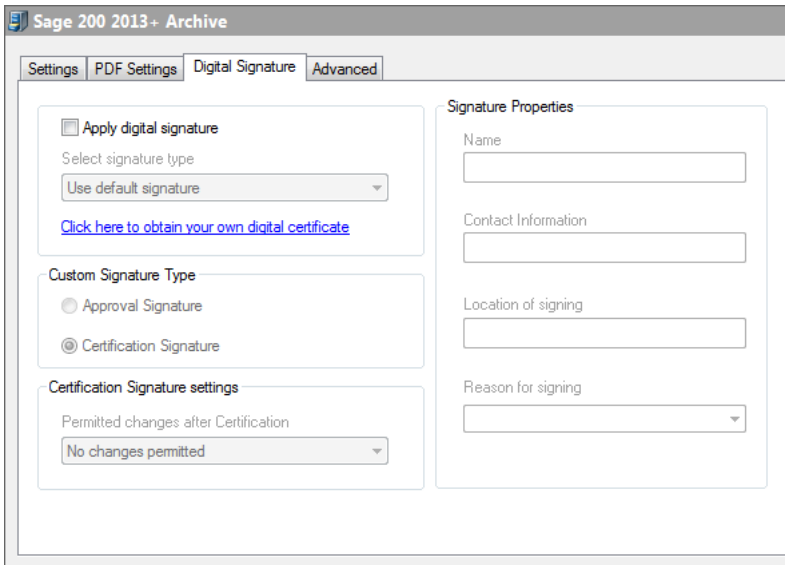
This option works in conjunction with Allow font embedding. Normally, only fonts that are authorised for distribution are embedded into PDF files created by Spindle Document Distribution. However, this option overrides this setting and forces the font to be embedded in to the PDF file. You will need to get permission from the owner of the font you want to embed before you enable this option. **Note: if you enable this setting without obtaining the font owners permission you may be breaking copyright law.**

Embed Unicode font information

Unicode is a technical specification of the amount of space that is required to store a character in any of the world's languages. Tick this option if the PDF file needs to support larger character sets.

7.3.8.3 Digital Signature Tab

The Digital Signature tab provides the facility to electronically sign PDF files.



Digital Signature Tab

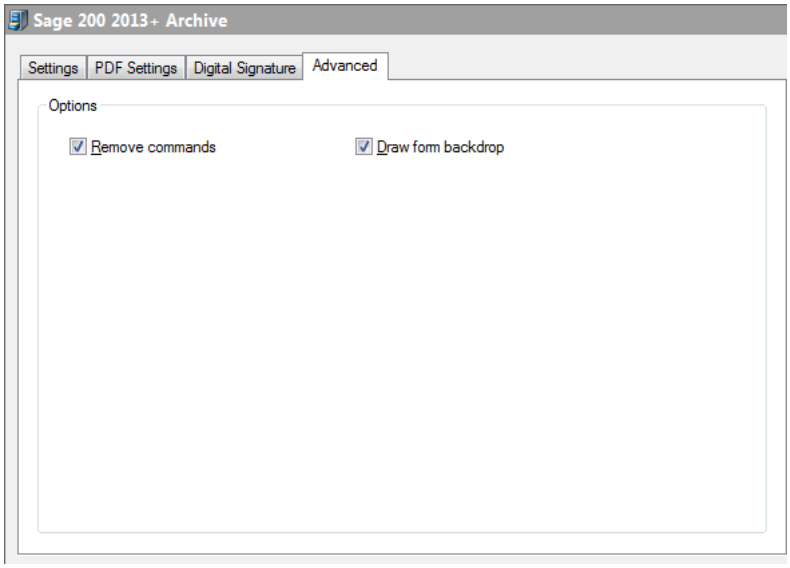
Digital signature

The signature capability within Spindle Document Distribution has been designed to provide Certified Document Services (CDS) through an Adobe CDS provider. A CDS signature certifies to the recipient of the signed PDF that the author's identity has been verified by a trusted organisation and that the document has not been altered. The trusted status of the PDF is displayed in Adobe PDF reading applications, by a blue ribbon or green tick, an information panel and a bar at the top of the screen.

The Digital Signature dialogs used in e-mail and archive settings appear the same as, and inherit default values from the current user's settings. See the User Settings (see page 195) section of the help file for further information.

7.3.8.4 Advanced Tab

Advanced settings should only be changed by an experienced Spindle Document Distribution installer.



Advanced Tab

Remove commands

Removes the Spindle Document Distribution embedded commands from the document before archiving the file. To leave the commands in the archived document untick this option. Default setting is ticked (remove the commands).

Draw form backdrop

Saves the PDF file with the forms that have been selected in the document operation. To reduce the size of the PDF file you can untick this option which will create the PDF file without any forms. Default setting is ticked.

7.4 External Data

External Data enables Spindle Document Distribution to retrieve information from external sources such as databases. Applications such as accountancy packages and CRM systems contain lots of information on your customers and suppliers. Many of these applications enable you to access this information through a system known as ODBC (Open DataBase Connectivity). Spindle Document Distribution can use embedded commands on a document or report to find and access records in these databases.

There are a number of different reasons for using External Data:

- The information required to process a document is inaccessible from the report designer.
- The information is located in a different database or application from where the document originates.
- As a preference by a user as the report designer maybe difficult to use.

External Data can be used to override ## commands that appear on the document printed to Spindle Document Distribution. For example if you want to email a statement to a customer and, on a different document operation, email the sales person for that account, you can use External Data to override the customers email address with the sales persons email address, thus delivering a copy of the statement to the sales person.

External Data is made up of two parts, Data Sources and Data Links.

7.4.1 Data Sources

Data Sources allow you to easily create connections to other applications databases by using ODBC (Open DataBase Connectivity). Once a data source has been created it can be used by Data Links (see page 133) to extract values such as email addresses, fax numbers and other information.

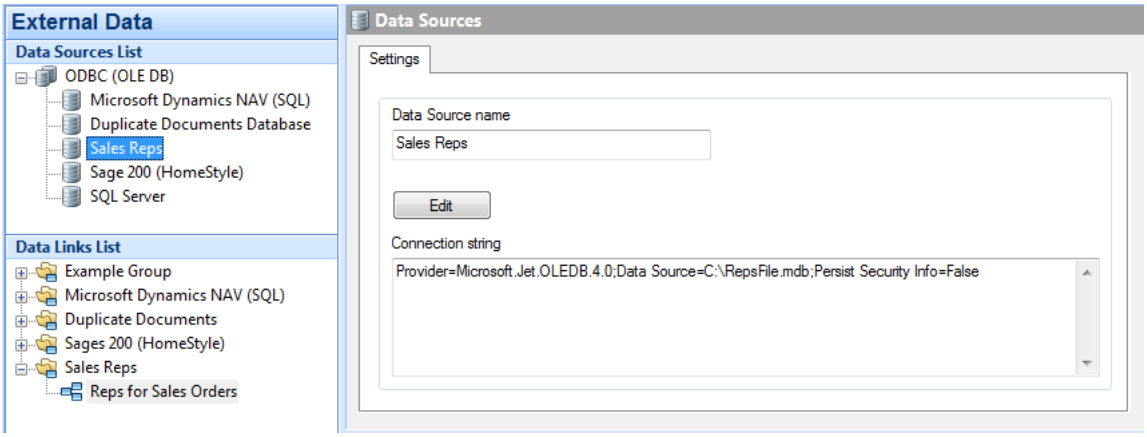
A data source tells Spindle Document Distribution specific information about how to access and work with a particular database. To access a data source you may need to know the database engine, the database location, a user name and a password. You can get most of this information from your applications help file or manual.

Examples of applications that can be used with Data Sources include:

- Sage 50
- Sage 200
- Sage Line 100
- Microsoft Access databases
- Microsoft SQL databases
- ACT!
- and many more...

Spindle Document Distribution data sources connect to applications using OLE DB providers. This means if the application

comes with an OLE DB or ODBC driver,Spindle Document Distribution should be able to connect to and extract data from it.



Example data sources

In the above example the data source **Sales Reps** is pointing to a Microsoft Access database called **RepsFile.mdb**. This data source can be accessed by a Data Link which gives Spindle Document Distribution access to all of its tables and columns.

7.4.1.1 Creating data sources

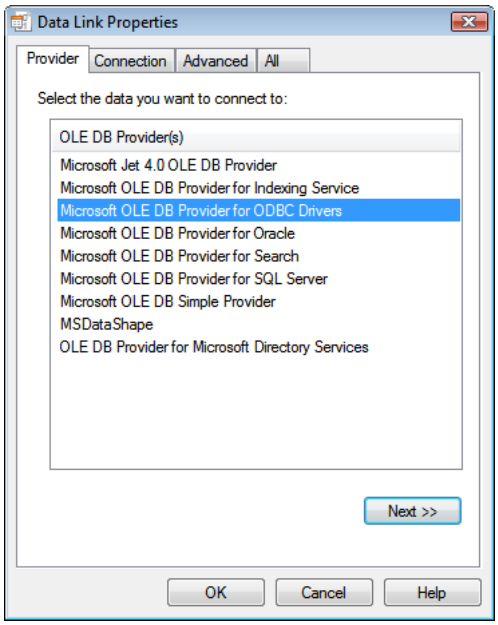
When connecting to a database you may need to know information on how to connect to it, such as a user name and password. If you are unsure how to connect to the database please contact the support team or IT department that looks after the 3rd party application.

To create a data source:

1. Launch Spindle Document Distribution Tools and select **External Data** from the shortcut bar.
2. In the **Data Sources List** tree window right-click and select **New Data Source** from the menu. You can also click the button from the External Data toolbar.
3. A new entry will appear in the tree window called **New Data Source**. Rename the entry, e.g. 'My Data Source'.
4. Click the **Edit** button. The standard Windows Data Link Properties dialog box appears.
5. Create the connection by selecting the required **Provider** and filling in the details on the **Connection** tab.
6. Click the **Test Connection** button to check that you can connect to the data source.
7. Click **OK** to save the new Data Source. The generated connection string is displayed on screen.

Tip: Since the connection string is stored in the global database any user who needs to use the Data Source must have the ODBC drivers and connection details setup exactly the same way on each computer.

Tip: Do not confuse Data Link Properties with Data Links. The Data Link Properties dialog box is a standard Windows tool which enables you to create a connection, or link, to a data source.



Standard Windows Data Link dialog box

7.4.1.2 Deleting data sources

If you delete a data source you must remove all references to it in Data Links.

To delete a data source

1. Launch Spindle Document Distribution Tools and select **External Data** from the shortcut bar.
2. In the **Data Sources List** tree window right-click on the data source you want to delete and select **Delete Data Source** from the menu. You can also click the button from the External Data toolbar.
3. A dialog box will appear asking you to confirm that you want to delete the data source. Click **Yes**.
4. The data source will be removed from the list.

7.4.1.3 Renaming data sources

To rename a data source

1. Launch Spindle Document Distribution Tools and select **External Data** from the shortcut bar.
2. In the **Data Sources List** tree window right-click on the data source you want to rename and select **Rename Data Source** from the menu. You can also click the button from the External Data toolbar.
3. The data source name in the tree window becomes highlighted.
4. Type in the new name of the data source and press return.
5. The data source has now been renamed.

or

1. Launch Spindle Document Distribution Tools and select **External Data** from the shortcut bar.
2. In the tree window left-click on the data source you want to rename.
3. In the dialog window type in the new name of the data source in the **Data Source name** edit box.
4. As soon as the edit window loses focus the data source is renamed.

7.4.1.4 Editing data sources

To edit a data source

1. Launch Spindle Document Distribution Tools and select **External Data** from the shortcut bar.
2. In the **Data Sources List** tree window left-click on the data source you want to edit.
3. In the dialog window click the **Edit** button. You can also click the button from the External Data toolbar.
4. The standard Windows Data Link Properties dialog box appears.
5. Edit the connection by selecting the required **Provider** and filling in the details on the **Connection** tab.
6. Click the **Test Connection** button to check that you can connect to the data source.
7. Click **OK** to save the Data Source. The generated connection string is displayed on screen.

See Creating a data source (see page 131) for more information.

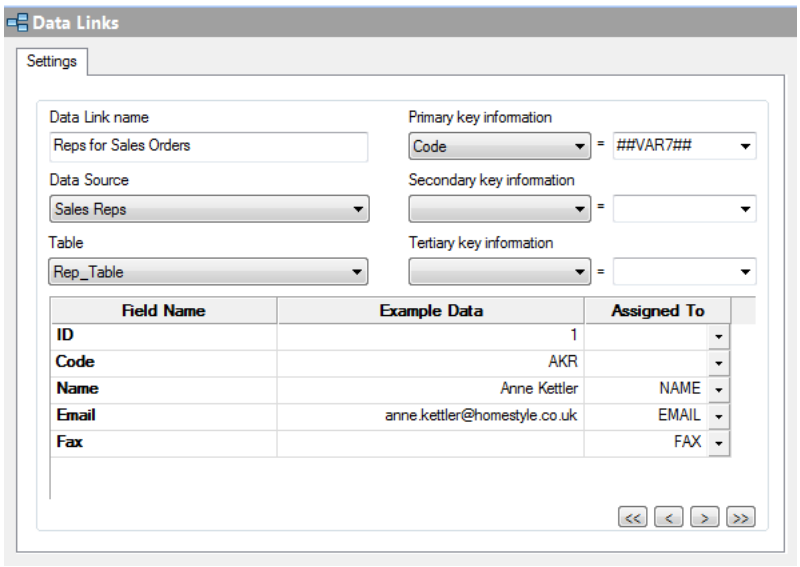
7.4.2 Data Links

Data Links are used to retrieve information from Data Sources (see page 130). The information is stored in Spindle Document Distribution commands such as DBVAR01, NAME, EMAIL, COMPANY etc. These commands can then be used for destination emails address and to determine what document operations to perform (see Criteria). Data Links can also be used to lookup information from a Data Source using the results from a previous Data Source/Data Link result.

Data Links are grouped together into Data Groups. This makes them easier to find when you have created a large number of Data Links.

Examples of information can be extracted using Data Links include:

- Customers email address (different ones for invoices, statements, purchase orders etc.)
- Customers delivery preference (assign to the command PREF)
- Statement amounts (assign to command DBVAR01 etc.)



Example data links

7.4.2.1 Creating data links

To create a data link:

1. Launch Spindle Document Distribution Tools and select **External Data** from the shortcut bar.
2. In the **Data Links List** tree window right-click on the required Data Link Group and select **New Data Link** from the menu. You can also click the button from the External Data toolbar.
3. A new entry will appear in the tree window called **New Data Link**. Rename the entry, e.g. 'My Data Link'.
4. Select the data source you want to use from the **Data Source** drop-down list.
5. Select the required table from the **Table** drop-down list. The **Field Name** column will be populated with the fields from the table.

Tables can contain many records, so to extract the data we require we need to reduce the records down to one. To do this we use the Primary, Secondary and Tertiary key information to search for values in the fields of the table.

6. In the **Primary key information** drop-down list select the table field you want to search in.
7. Next, in the drop-down list to the right either select the command that contains the search data or directly type in a value to search for.
8. Repeat the process with the **Secondary key information** and **Tertiary key information** to narrow down the search.

The next step is to assign the data from the record to Spindle Document Distribution commands, where they can be used by document operations.

9. On the grid in the **Field Name** column find the field that contains the required data.
10. From the **Assigned To** column drop-down list select the command the data will be copied into.
11. Repeat for each field required.

Note: The example data shown in the grid does not contain the data that will be assigned. It is only used to show example data from the table.

7.4.2.2 Deleting data links

If you delete a data link you must remove all references to it in Document Automation.

To delete a data link

1. Launch Spindle Document Distribution Tools and select **External Data** from the shortcut bar.
2. In the **Data Links List** tree window right-click on the data source you want to delete and select **Delete Data Link** from the menu. You can also click the button from the External Data toolbar.
3. A dialog box will appear asking you to confirm that you want to delete the data link. Click **Yes**.
4. The data link will be removed from the list.

7.4.2.3 Renaming data links

To rename a data link

1. Launch Spindle Document Distribution Tools and select **External Data** from the shortcut bar.
2. In the **Data Links List** tree window right-click on the data link you want to rename and select **Rename Data Link** from the menu. You can also click the button from the External Data toolbar.
3. The data link name in the tree window becomes highlighted.
4. Type in the new name of the data link and press return.
5. The data link has now been renamed.

or

1. Launch Spindle Document Distribution Tools and select **External Data** from the shortcut bar.
2. In the **Data Links List** tree window left-click on the data link you want to rename.
3. In the dialog window type in the new name of the data link in the **Data Link name** edit box.
4. As soon as the edit window loses focus the data link is renamed.

7.4.2.4 Creating data groups

To create a data group design:

1. Launch Spindle Document Distribution Tools and select **External Data** from the shortcut bar.
2. In the **Data Links List** tree window right-click and select **New Data Group** from the menu. You can also click the button from the External Data toolbar.
3. A new entry will appear in the tree window called **New Data Group**. Rename the entry, e.g. 'My Accounts System'.
4. The data group has been created. You can now create Data Links (see page 134) under this group.

7.4.2.5 Deleting data groups

If you delete a data group you must remove all references to it in Document Automation. Deleting a data group also deletes all of the data links it contains.

To delete a data group

1. Launch Spindle Document Distribution Tools and select **External Data** from the shortcut bar.
2. In the **Data Links List** tree window right-click on the data group you want to delete and select **Delete Group** from the menu. You can also click the button from the External Data toolbar.
3. A dialog box will appear asking you to confirm that you want to delete the data group. Click **Yes**.
4. The data group will be removed from the list.

7.4.2.6 Renaming data groups

To rename a data group

1. Launch Spindle Document Distribution Tools and select **External Data** from the shortcut bar.
2. In the **Data Links List** tree window right-click on the data group you want to rename and select **Rename Group** from the menu. You can also click the button from the External Data toolbar.
3. The data group name in the tree window becomes highlighted.
4. Type in the new name of the data group and press return.
5. The data group has now been renamed.

7.5 Barcode Designer

Spindle Document Distribution supports the creation of 1D barcodes. These type of barcodes allow you to store textual information in a series of lines. The Barcode Designer allows you to configure parameters to enable Spindle Document Distribution to generate a large number of barcode symbologies. These designs can then be chosen for placement on your documents using Document Automation (see page 55).

Once you have designed a barcode you can use the design in any number of Document Operations (see page 61). If you need to change a parameter of the barcode, such as enabling a check digit, you need only make the change in the designer and all of the document operations are automatically updated.

Barcodes have a wide range of application uses across a business. They are predominately used in stock control, warehousing and manufacturing processes and on documents such as picking lists, delivery notes and works orders. However, this is not an exhaustive list and Spindle Document Distribution can create barcodes for virtually any document you print.

Supported barcode symbologies:

- 2 of 5
- 3 of 9
- China Postal
- Codabar / NW-7
- Code 11
- Code 128
- Code 39
- Code 93
- Code B
- Code 128 Type A
- Code 128 Type B
- Deutsche Post
- EAN/UCC-128
- EAN/UCC-14
- EAN13
- EAN13+2
- EAN13+5
- EAN-8
- EAN8+2
- EAN8+5
- Ex Code 93
- Ext. Code 39
- FIM A
- FIM B
- FIM C
- IATA 2 of 5
- Interleaved-2 of 5
- ISBN
- ISMN
- ISSN
- ITF-14
- ITF-6
- Matrix 2/5
- MSI
- Planet 12
- Planet 14
- Plessy
- PostNet type A
- PostNet type C
- PostNet type C’
- SSCC
- Swiss Post
- Telepan ASCII
- Telepan numeric
- Telepan standard
- UPC-A
- UPCA+2
- UPCA+5
- UPC-E
- UPCE+2
- UPCE+5

7.5.1 Creating barcodes

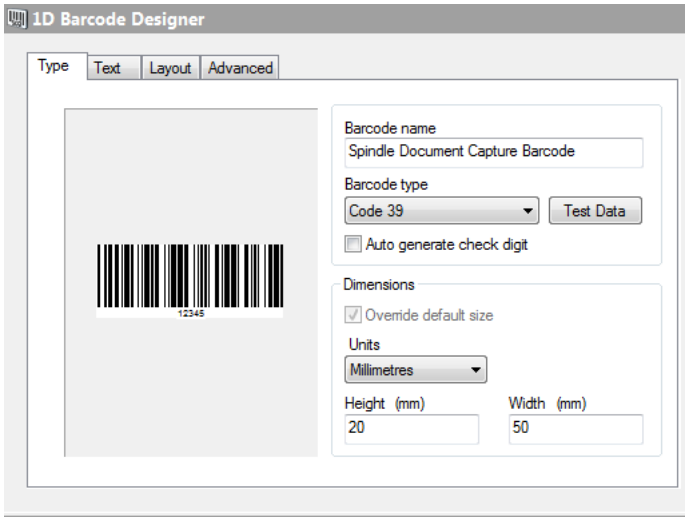
To create a barcode design:

1. Launch Spindle Document Distribution Tools and select **Barcode Designer** from the shortcut bar.
2. In the tree window right-click on the 1D Barcodes entry and select **New Barcode** from the menu. You can also click the button from the Barcode Designer toolbar.
3. A new entry will appear in the tree window called **New 1D Barcode**. Rename the entry, e.g. 'Code 138 Picking List Item'.
4. The barcode design has been created. You can now edit its settings.

To create a barcode to be used with a Spindle Document Capture archive device:

1. Launch Spindle Document Distribution Tools and select **Barcode Designer** from the shortcut bar.
2. In the tree window right-click on the 1D Barcodes entry and select **New Barcode** from the menu. You can also click the  button from the Barcode Designer toolbar.
3. A new entry will appear in the tree window called **New 1D Barcode**. Rename the entry to something more specific, e.g. 'Spindle Document Capture barcode'.
4. Drop down on Barcode type and select 'Code 39'. **Note:** Spindle Document Capture only supports Code 39 barcodes.

5. Set Height and Width. The recommendation is 20x50mm so that it can be recognised consistently by most scanners.
6. If you wish for the barcode text to be displayed under the barcode, on the Text tab tick 'Display barcode text'.
7. You have now created a barcode that will be compatible with Spindle Document Capture



7.5.2 Deleting barcodes

If you delete a barcode design you must remove all references to it in Document Automation.

To delete a barcode design:

1. Launch Spindle Document Distribution Tools and select **Barcode Designer** from the shortcut bar.
2. In the tree window right-click on the barcode design you want to delete and select **Delete Barcode** from the menu. You can also click the button from the Barcode Designer toolbar.
3. A dialog box will appear asking you to confirm that you want to delete the barcode design. Click **Yes**.
4. The barcode design will be removed from the list.

7.5.3 Renaming barcodes

To rename a barode design:

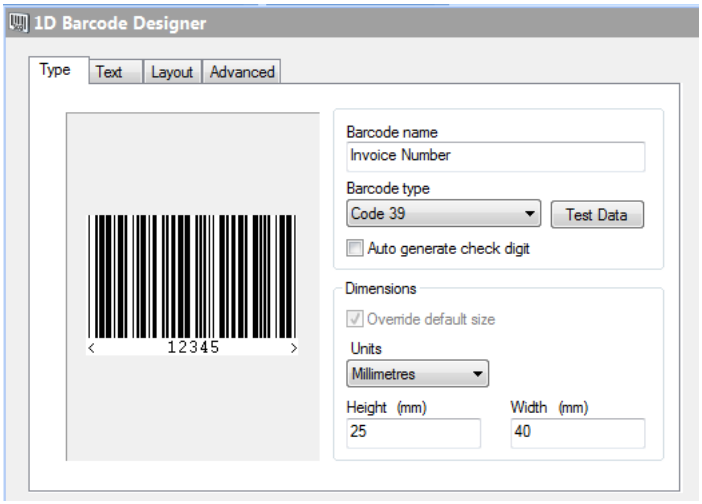
1. Launch Spindle Document Distribution Tools and select **Barcode Designer** from the shortcut bar.
2. In the tree window right-click on the barcode design you want to rename and select **Rename Barcode** from the menu. You can also click the button from the Barcode Designer toolbar.
3. The barcode design name in the tree window becomes highlighted.
4. Type in the new name of the barcode design and press return.
5. The barcode design has now been renamed.

or

1. Launch Spindle Document Distribution Tools and select **Barcode Designer** from the shortcut bar.
2. In the tree window left-click on the barcode design you want to rename.
3. In the dialog window type in the new name of the barcode design in the **Barcode name** edit box.
4. As soon as the edit window loses focus the barcode design is renamed.

7.5.4 Type Tab

The Type tab defines the name of the design, the symbology of the barcode and the default dimensions when generated.



Barcode Designer Type Tab

Barcode name

The name of the barcode design. This is the name displayed when choosing the barcode design in a Document Operation (see page 61).

Barcode type

Selects the type of barcode symbology to use with this design. Various controls on this and other tabs are enabled or disabled depending on the selected item due to the different capabilities of each symbology.

Test Data

The sample image shown above is created using test data, which defaults to 12345. This feature allows you to change this test data and see the result on the sample image.

Auto generate check digit

Various barcode symbologies support a check digit. Some symbologies insist on a check digit whilst others do not support it. This option may only be enabled if you can optionally control the creation of a check digit.

Override default size

Some barcode symbologies have default sizes associated with them. For those that don't Spindle Document Distribution will suggest a size to enable a sample image to be produced.

Units

Chooses the unit measurement system to use when entering the barcode width and height. Available options are millimetres or inches.

Width

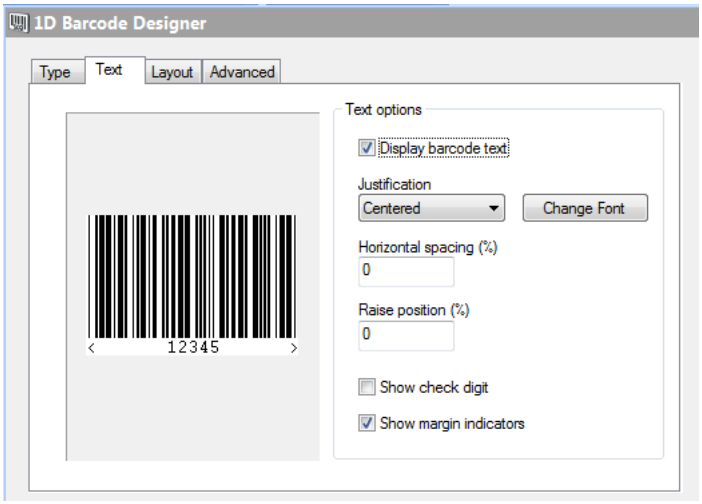
Specifies the width, in units, of the barcode.

Height

Specifies the height, in units, of the barcode.

7.5.5 Text Tab

The Text tab allows you to turn on the human readable text element of the barcode and to alter the appearance of the text.



Barcode Designer Text Tab

Display barcode text

Tick this option to enable the human readable text element of the barcode. Ticking this option will enable the other controls on this tab.

Justification

Sets the alignment of human readable text under the barcode. This can either be centred, align left or align right.

Change Font

Brings up the font selection dialog box and allows you to change the font the text is printed in.

Horizontal spacing (%)

Used to adjust the space under the barcode occupied by the human readable text. The value is a percentage of the width of the barcode. When set to zero the text under the barcode is produced at its normal intercharacter spacing.

Raise position (%)

Specifies a distance by which the text form of the code is raised before displaying.

Show check digit

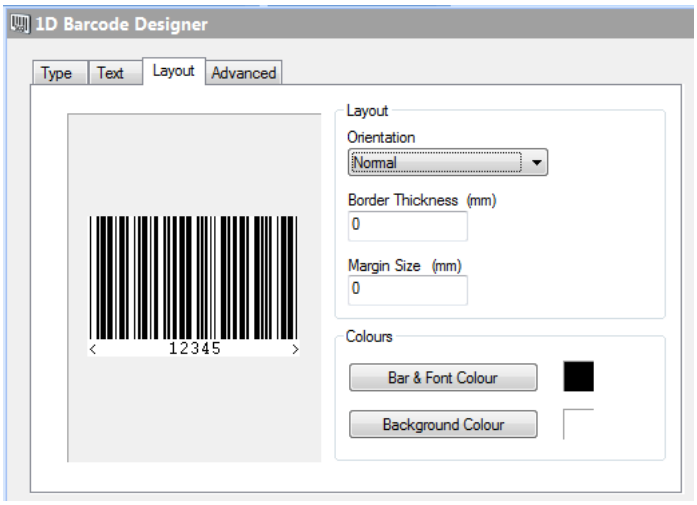
If **Auto generate check digit** is enabled, ticking this option will print the check digit in the text string. If not ticked only the original text is printed.

Show margin indicators

Shows the margin of barcode text by surrounding it in <> characters.

7.5.6 Layout Tab

This tab controls the 'look and feel' of the barcode.



Barcode Designer Layout Tab

Orientation

Specifies whether the barcode image should be generated normally or with clockwise or anticlockwise rotation through 90 degrees.

Border Thickness (mm)

The thickness (in units selected on the Type tab) of any border required around the barcode image. Any border is created using the colour specified by **Background Colour**.

Margin Size (mm)

The light margin size (in units selected on the Type tab).

Bar & Font Colour

Sets the colour of the barcode lines and text.

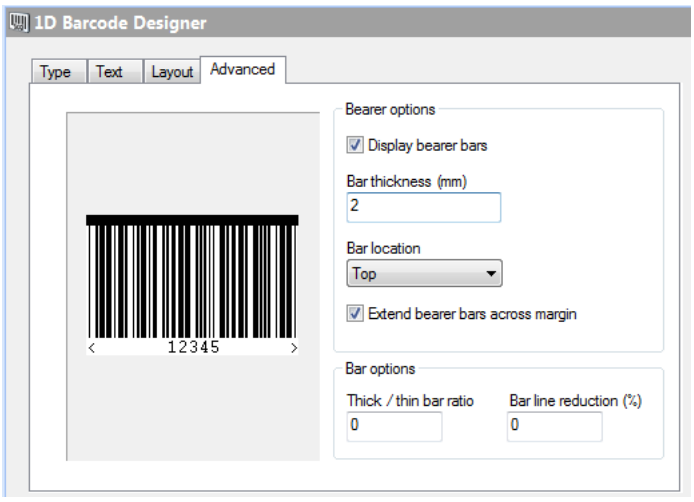
Background Colour

Sets the colour of the image background.

Tip: If human readable text is displayed on the barcode and the text does not rotate with the barcode then a True Type font needs to be selected on the Text tab.

7.5.7 Advanced Tab

This tab allows the configuring of advanced settings such as bearer bars and should only be used if you have an indepth knowledge of barcodes. The example below shows a 2mm bearer bar (think black line) on the top of the barcode.



Display bearer bars

Tick this option to enable rendering of bearer bars. Ticking this option will enable the other controls on this tab.

Bar thickness (mm)

Sets the thickness of bearer bars (in units selected on the Type tab).

Bar location

Specifies the location to draw the bearer bars. This can either be at the top of the barcode or both the top and bottom of the barcode.

Extend bearer bars across margin

If ticked the bearer bars are extended over the light margins, if any have been specified.

Thick / thin bar ratio

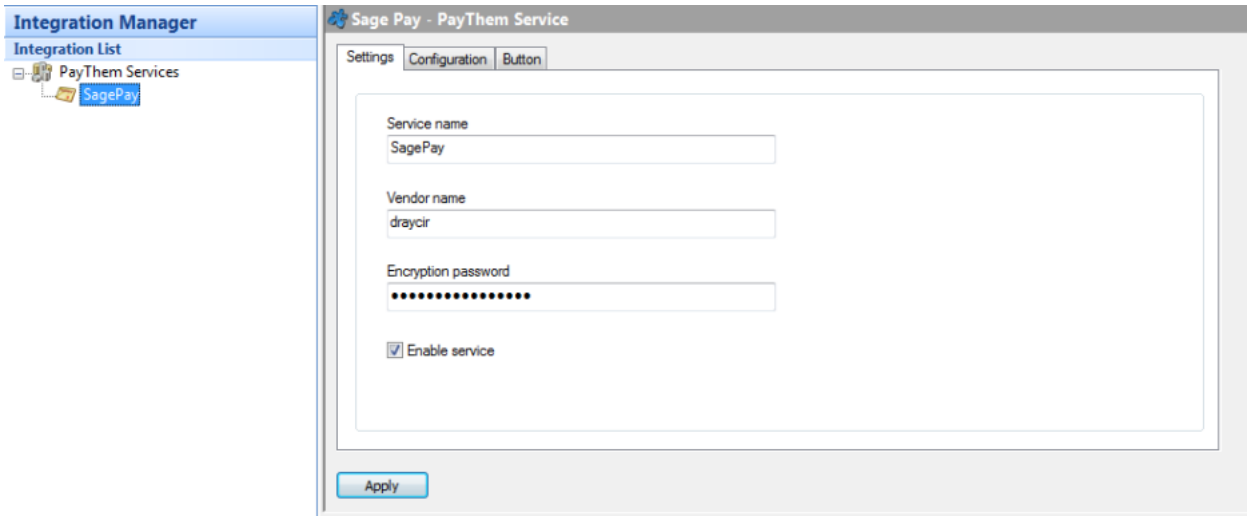
Sets the thick/thin bar ratio for those barcode types which allow the value to vary (such as Code 39). The actual ratio use is one tenth of the value of this parameter. When a value of 0 is specified the default bar width ratio of 2.5 : 1 is used.

Bar line reduction (%)

The line thickness of each line drawn on the barcode image is reduced by this percentage amount. This property may be used to compensate for ink spreading during wet-ink printing.

7.6 Integration Manager

Integration Manager allows you to set up and configure PayThem services within Spindle Document Distribution.



PayThem

PayThem will allow you to place a clickable 'Pay Now' button on your outbound PDF documents, or add a payment link on your outbound emails. Clicking the button or payment link will allow the recipient to pay you via one of our supported payment service providers (PSP).

7.6.1 Creating new PayThem services

Creating a PayThem service enables you to use it on a Document Operation so that you can add a 'Pay Now' button onto your outbound PDF documents or add a payment link onto your outbound emails.

To create a PayThem service:

1. Launch Spindle Document Distribution Tools and select **Integration Manager** from the shortcut bar
2. Right-click on PayThem Services and select **New PayThem Service**
3. Select the relevant payment provider (you must already have a vendor account with a supported payment provider to use this service)
4. Rename the **Service name** (if required or leave as the default)
5. The PayThem service has been created. You can now edit its settings.

7.6.2 Deleting PayThem services

If you delete a PayThem service you must remove all references to it on Document Operations.

To delete a PayThem service:

1. Launch Spindle Document Distribution Tools and select **Integration Manager** from the shortcut bar.
2. In the tree window right-click on the PayThem service you want to delete and select **Delete PayThem Service** from the menu. You can also click the button from the Integration Manager toolbar.
3. A dialog box will appear asking you to confirm that you want to delete the Payment Service. Click **Yes**.
4. The PayThem service entry will be removed from the list.

7.6.3 Renaming PayThem services

To rename a PayThem service:

1. Launch Spindle Document Distribution Tools and select **Integration Manager** from the shortcut bar.
2. In the tree window right-click on the profile you want to rename and select **Rename PayThem Service** from the menu.
   You can also click the  button from the Integration Manager toolbar.
3. The PayThem service name in the tree window becomes highlighted.
4. Type in the new name of the PayThem and press return.
5. The PayThem service name has now been renamed.

or

1. Launch Spindle Document Distribution Tools and select **Integration Manager** from the shortcut bar.
2. In the tree window left-click on the PayThem service you want to rename.
3. In the dialog window type in the new name of the profile in the **Service name** edit box.
4. As soon as the edit window loses focus the PayThem service is renamed.

7.6.4 Settings Tab - Sage Pay

The Settings Tab is where the Service name and the Sage Pay connection properties can be configured.

Service name

The name of the PayThem service. This is the name displayed when choosing the PayThem service in a Document Operation (see page 61).

Vendor name

Your Sage Pay vendor name.

Encryption password

Your Sage Pay account encryption password.

You can obtain your Sage Pay encryption password by logging into your My Sage Pay site as an admin user.

Enable service

You can enable or disable the service via the ‘Enable service’ checkbox. Enabling the service will allow you to add a Pay Now button on your Invoice or add a payment link on the email body.

7.6.5 Settings Tab - Worldpay

The Settings Tab is where the Service name and the Worldpay connection properties can be configured.

Service name

The name of the PayThem service. This is the name displayed when choosing the PayThem service in a Document Operation (see page 61).

Installation ID

Your Worldpay Installation ID.

You can obtain your Worldpay Installation ID by logging into your Worldpay Business Manager site and viewing 'Setup' > 'Installations'

Merchant code

Your Worldpay Merchant code.

Enable test payment mode

You can enable the a test payment mode via the ‘Enable test payment mode’ checkbox. This means any payments made will go through the Test system and will be visible in the Test Mode of your Worldpay Business Manager.

Enable service

You can enable or disable the service via the ‘Enable service’ checkbox. Enabling the service will allow you to add a Pay Now button on your outbound document or add a payment link on the email body.

7.6.6 Configuration Tab - Sage Pay

The Configuration Tab lists Sage Pay form integration fields, some of which are mandatory (shown in red) and others that are populated to enhance the user experience when paying via Sage Pay (when clicking the Pay Now button on an invoice or the payment link on an email).

Field Name

List of Sage Pay form integration fields. The required fields are highlighted in red and must be provided.

Assigned Value

Use any combination of ## variables to take data from the host system, or hard-code values to populate the field name property.

The Assigned Values are pre-populated with defaults that correspond to the Sage 200 - SOP Invoice (Single) layout that is shipped with Spindle Document Distribution.

If you need to make any changes to the configuration to match your layout, you can populate/amend the Assigned Value for the respective fields accordingly.

Note: The VendorData field value should not be changed if you intend to use the Spindle Reconciler to allocate payments.

7.6.7 Configuration Tab - Worldpay

The Configuration Tab lists Worldpay integration fields, some of which are mandatory (shown in red) and others that are populated to enhance the user experience when paying via Worldpay (when clicking the Pay Now button on a document or

the payment link on an email).

Field Name

List of Worldpay fields. The required fields are highlighted in red and must be provided.

Assigned Value

Use any combination of ## variables to take data from the host system, or hard-code values to populate the field name property.

If you need to make any changes to the configuration to match your layout, you can populate/amend the Assigned Value for the respective fields accordingly.

The fields, their type, their constraints and descriptions can be found at Worldpay's integration support site for the Business Gateway (http://support.worldpay.com/support/kb/bg/htmlredirect/htmlredirect.htm). Once there, click on the 'HTML Redirect parameters' topic from the contents.

Note: Please ensure your Auth Mode setup corresponds to the 'Capture Delay' setting in your account in Worldpay Business Manager. To check if an account is using Auth Mode or Pre-Auth, log into the business manager > Setup > Set up configuration and then find 'Capture delay'. If capture delay is turned off, then this means the account is set to Pre-Auth. If the capture delay is set to 0 or longer, then the account is set to Full Auth.

MCC 6012 (Financial Services) payments

To meet a requirement from VISA for merchants with the Merchant Code Classification 6012 for financial services; customers who pay with a VISA card in British pounds must complete four extra fields. These fields are described at Worldpay's integration support site for the Business Gateway (http://support.worldpay.com/support/kb/bg/htmlredirect/htmlredirect.htm). Once there, click on the 'HTML 'Important Changes from VISA Europe' topic from the contents.

7.6.8 Button Tab

The Button Tab allows you to select the style of the 'Pay Now' button that you would like to appear on your outbound PDF documents.

You can select up to four button styles, each being a different colour - Blue, Green, Dark Grey and Light Grey.

Button style

Select the button style you require.

Preview

The preview panel will display a preview of the selected button style.

Note:

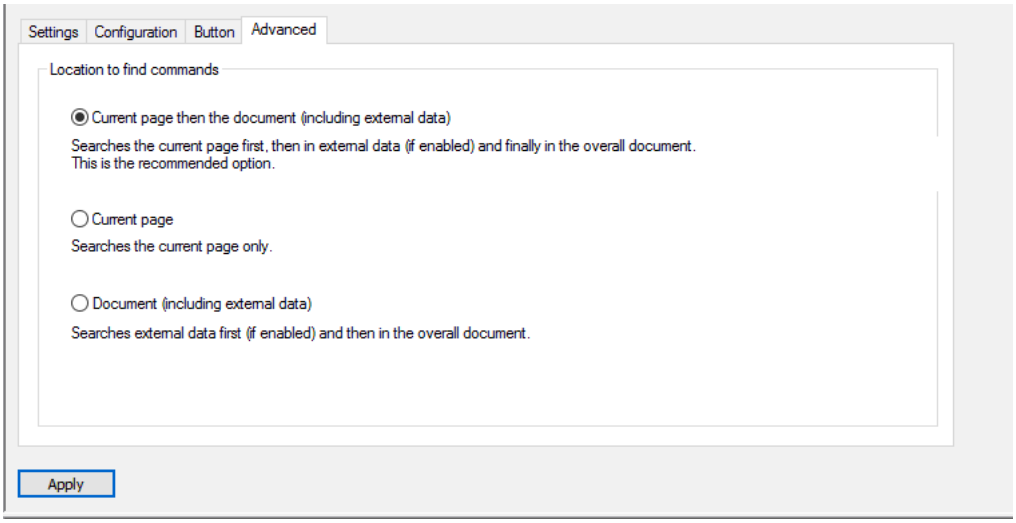
- In addition to setting up the PayThem service, in order for the 'Pay Now' button to appear on your PDF documents, you must:
  1. Ensure you have entered a valid PayThem licence key (see page 54).

2. Select the PayThem service on your Document Operation > PayThem tab (see page 72).
3. Place a ##PAYTHEM## command on your layout. The position of the button will determined my the placement of the ##PAYTHEM## command.

- If you intend to place a payment link on your emails rather than add a 'Pay Now' button on your PDF documents, omitting the ##PAYTHEM## command from your layout will ensure the button is not added on your PDF documents. To add a payment link on your email, you must:
  1. Ensure you have entered a valid PayThem licence key (see page 54).
  2. Select the PayThem service on your Document Operation > PayThem tab (see page 72).
  3. On the Document Operation > Email Settings, you will need to add a ##PAYTHEMURL## command inside a href tag (using the HTML editor) to add the payment link on your emails.

7.6.9 Advanced Tab

This tab allows you to configure any advanced settings for the PayThem service.



Location to find commands

Specifies where Spindle Document Distribution should look to find the PayThem ## commands which are mapped in the 'Configuration' tab.

Current page then the document (including external data)

This option first looks for the PayThem command data on the page of your document where the ##PAYTHEM## command is defined. If it doesn't find a match, then it will search for the command data in an External Data Source > Data Link, if one is available.

Finally, if the command data is not found in External Data, then Spindle Document Distribution will use Document level commands. Document level commands are the first occurrence of the ## commands within an overall document. For example, If you had a three page document, with PayThem commands defined on all three pages, Spindle Document Distribution will attempt to read the ## commands off page 1 of the document. If the command data is not found at all, a blank value will be used.

This is the recommended option.

Note: The Data Link that Spindle Document Distribution uses will be from what has been added in your Document Automation > Document Operation > External Data tab.

Current page

This option looks for the PayThem command data from the page where your ##PAYTHEM## command is defined.

If you had a multi page document, with PayThem commands defined on all pages, this option would only attempt to read the ## commands off the page that has the ##PAYTHEM## command defined.

Document (including external data)

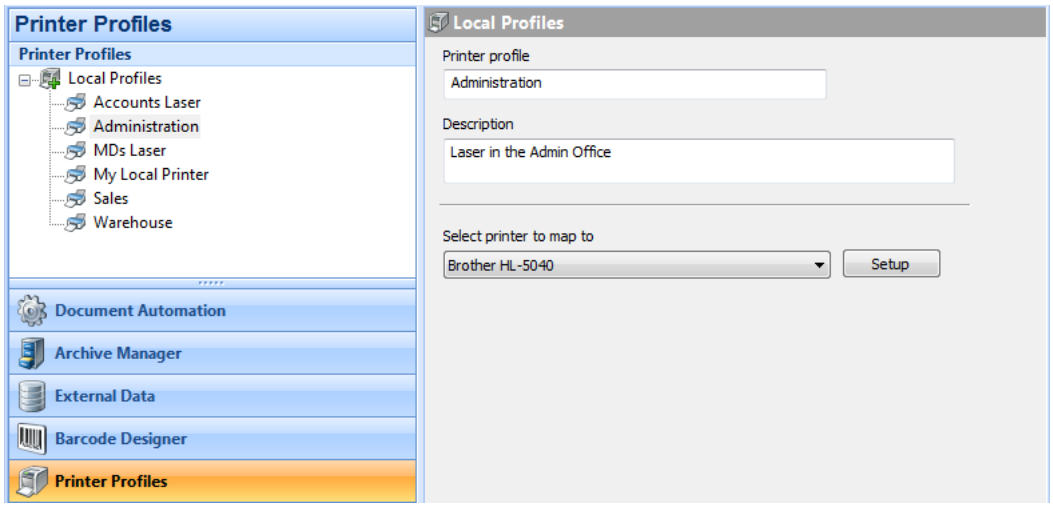
This option first looks for PayThem command data from an External Data Source > Data Link, if one is available.

If the command data is not found in External Data, then Spindle Document Distribution will use Document level commands. Document level commands are the first occurrence of the ## commands within an overall document. For example, If you had a three page document, with PayThem commands defined on all three pages, Spindle Document Distribution will attempt to read the ## commands off page 1 of the document. If the command data is not found at all, a blank value will be used.

Note: The Data Link that Spindle Document Distribution looks in will be from what has been added on your Document Automation > Document Operation > External Data tab.

7.7 Printer Profiles

Printer Profiles allow for the creation and configuration of virtual printers that only exist within Spindle Document Distribution.



Printer Profiles screen shot

When you create a Document Automation record which contains printing operations, you select the printer that the document should be sent to. In most cases this is not a problem as long as all users who will use the Document Automation record can see the printer that has been selected. However, problems can occur when users are running a mixture of operating systems where the network printers can have different names. Another problem can be, for example, when John wants the print job to be sent to the printer sitting on Johns desk and Peter wants the print job sent to his printer? This is where Printer Profiles come in.

When Spindle Document Distribution prints to a Printer Profile device, the destination printer the document actually gets printed to could be completely different for each user. This means you can use Printer Profiles to map different printers to different users under a common name as well as using them to store pre-defined printer settings. For example, you can create a Printer Profile called 'My Printer' which for John would point to the printer on his desk and for Peter would point to

the printer on his desk. This profile can be selected as the destination printer in Document Automation. When a document is processed by John, the destination printer is mapped to the real printer sitting on his desk. When Peter processes the same document the printer sitting on his desk is used.

Advantages for using Printer Profiles

- Mixed Windows operating systems. The printer driver selected against an operation is global to the Spindle Document Distribution system. However if users use different Windows operating systems (for example Windows Vista and Windows 2000) Spindle Document Distribution may not be able to print the document correctly, as each Windows operation system could be using different printer drivers. Printer Profiles bypass this problem by using the printer settings on each users computer.
- Load sharing. You can use Printer Profiles to share the work load of print jobs across several printers, ensuring that one printer doesn't get tied up all day!
- Geographical printing . Picking printers that are the closest and most suitable printer for each user prevents users from having to walk around the building collecting reports and documents, saving time and money.

Tip: You can use Printer Profiles to give meaningful names to printers. For example you can create a profile for the printer \\PNTSERVER\BLH540 and call it 'The Accounts Printer'.

7.7.1 Creating new printer profiles

Creating Printer Profiles enables you to use different printers for different users in the same Document Automation record. You can also use Printer Profiles to specify various printer settings such as paper trays etc.

To create a Printer Profile:

1. Launch Spindle Document Distribution Tools and select **Printer Profiles** from the shortcut bar.
2. In the tree window right-click on the Local Profiles entry and select **New Profile** from the menu. You can also click the button from the Printer Profiles toolbar.
3. A new entry will appear in the tree window called **New Printer Profile**. Rename the entry, e.g. 'Accounts Printer'.
4. The Description box will now be enabled in the dialog window. Enter a description for this profile, e.g. 'This is the accounts department laser printer'.
5. The profile has been created. You will now need to get all users to map the profile to the desired printer. See Mapping a Printer Profile to a user.

Tip: When a Printer Profile is created it is initially mapped to each users default windows printer.

7.7.2 Deleting printer profiles

If you delete a printer profile you must remove all references to it in Document Automation.

To delete a printer profile:

1. Launch Spindle Document Distribution Tools and select **Printer Profiles** from the shortcut bar.
2. In the tree window right-click on the profile you want to delete and select **Delete Profile** from the menu. You can also click the button from the Printer Profiles toolbar.
3. A dialog box will appear asking you to confirm that you want to delete the profile. Click **Yes**.
4. The profile has now been deleted.

7.7.3 Renaming printer profiles

To rename a printer profile:

1. Launch Spindle Document Distribution Tools and select **Printer Profiles** from the shortcut bar.
2. In the tree window right-click on the profile you want to rename and select **Rename Profile** from the menu. You can also click the  button from the Printer Profiles toolbar.
3. The profile name in the tree window becomes highlighted.
4. Type in the new name of the profile and press return.
5. The profile has now been renamed.

or

1. Launch Spindle Document Distribution Tools and select **Printer Profiles** from the shortcut bar.
2. In the tree window left-click on the profile you want to rename.
3. In the dialog window type in the new name of the profile in the **Printer profile** edit box.
4. As soon as the edit window loses focus the profile is renamed.

7.7.4 Mapping a Printer Profile to a user

To enable a user to use a Printer Profile you need to map the profile to a destination printer. This process needs to be completed on each users computer. All of the printer settings are stored in the users registry and are used when the profile has been selected in Document Automation.

To map a printer profile:

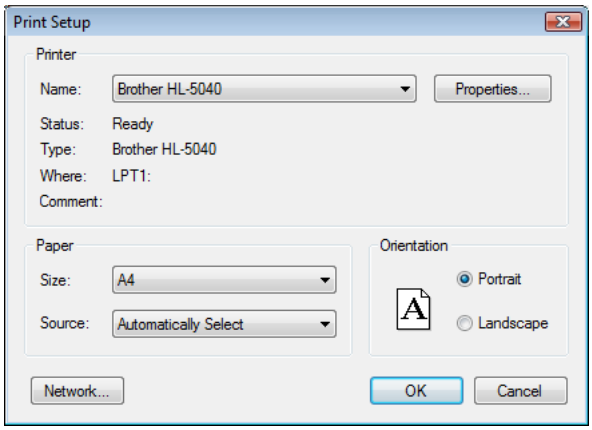
1. Launch Spindle Document Distribution Tools and select **Printer Profiles** from the shortcut bar.
2. In the tree window click on the name of the profile to edit.
3. From the drop down list **Select printer to map to**, select the destination printer.
4. To edit specific settings of the printer click the Setup button. The Print Setup dialog opens.
5. Edit the required settings and press **OK**.
6. The profile has now been mapped for this user. Repeat these steps on each users computer.

Tip: You only need to perform this step on a users computer if they will use a Document Automation that uses this printer profile.

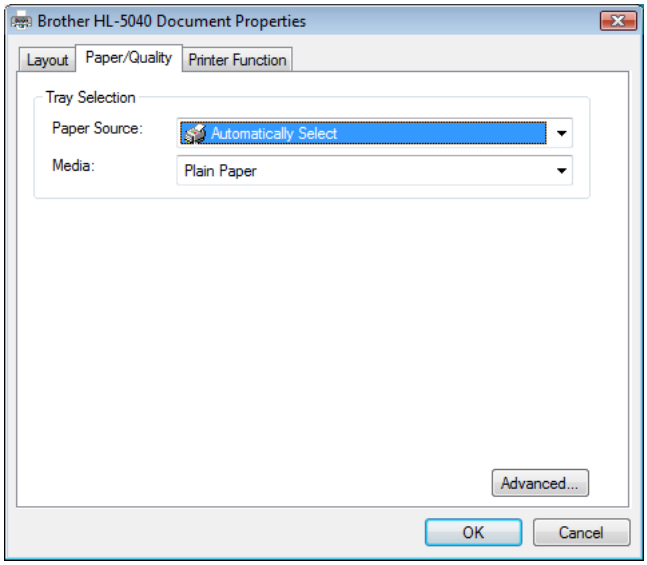
Configuring a printer profile

If you want documents printed to a particular tray or you need to use specific features of a printer, such as print quality, colour mode or duplexing, you will need to configure the printer. On the dialog window click on the **Setup** button. This will display the Print Setup dialog box. Clicking the **Properties** button will give you access to other printer options, however these options vary depending on the printer.

When you have finished configuring the printer the settings are stored in the registry on each users computer.



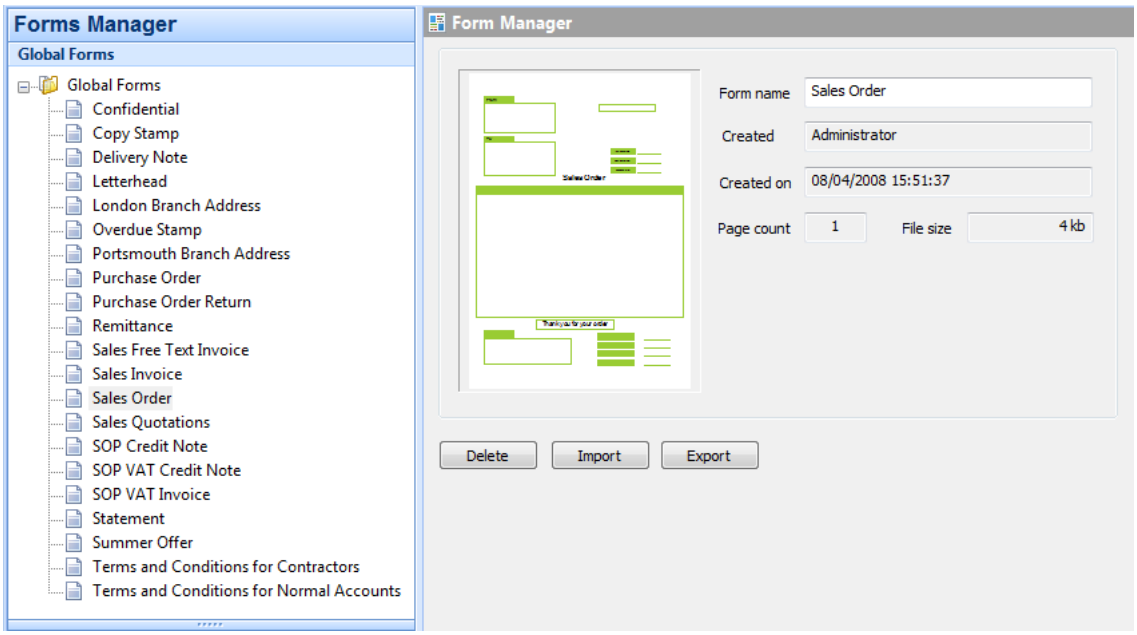
Print dialog box



Example properties for a Brother HL-5040 printer

7.8 Forms Manager

The Forms Manager controls the renaming, deleting, importing and exporting of form files. Forms cannot be created using the Forms Manager. Use the Spindle Pro Form Creator printer driver to create or update forms. For more information see the Creating new forms (see page 151) section or Creating a Form (see page 45) in Getting Started.



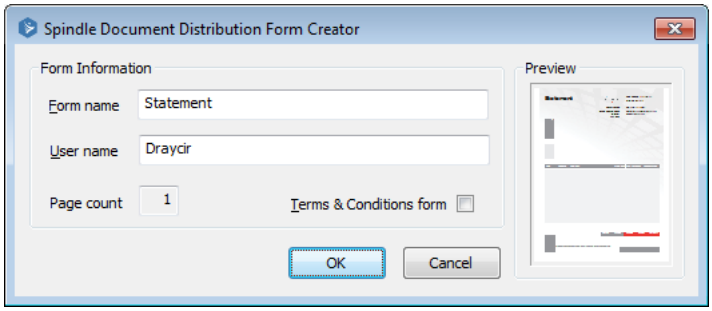
Forms Manager screen shot

7.8.1 Creating new forms

Forms can be created from virtually any Windows application that can print. Spindle Document Distribution comes supplied with several form templates that have been created using Microsoft Word.

To create a form:

1. Launch Microsoft Word and open your form design document or one of the Templates supplied. They can be found under the Templates folder where Spindle Document Distribution was originally installed.
2. Edit the document to your requirements by changing the address details, company logo etc.
3. From the **File** menu click the **Print** option. The Print dialog opens.
4. In **Name** select the printer called **Spindle Pro Form Creator**. Click **OK**. When completed printing the Form Creator dialog appears:



5. In **Form name** enter the name you want to call this form. Click **OK**. Only the first page of a printed document is saved as the form.
6. The form has now been saved. You can view this form in the Spindle Document Distribution Tools under Form Manager.

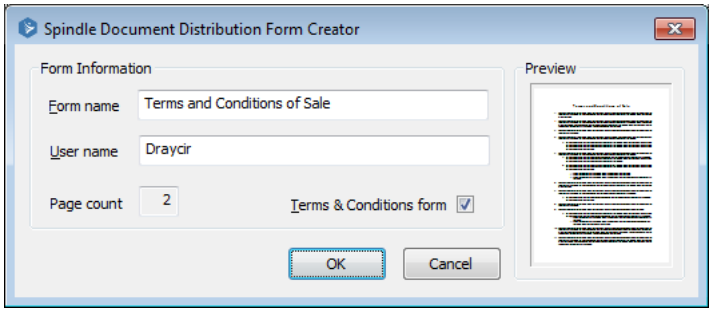
Tip: The default form name is extracted from the print job name which is generally the name of the document you are printing. If this name already exists as a form a message box will appear asking if you want to overwrite the current form.

7.8.2 Creating Terms & Conditions forms

Terms and Conditions forms are created in the same way as regular forms. They can be created from virtually any Windows application that can print. In this example we have used Microsoft Word to create a multi-page terms & conditions form.

To create a Terms & Conditions form:

1. Launch Microsoft Word and either open your standard terms & conditions document or type them in.
2. From the **File** menu click the **Print** option. The Print dialog opens.
3. In **Name** select the printer called **Spindle Pro Form Creator**. Click **OK**. When completed printing the Form Creator dialog appears:



4. In **Form name** enter the name you want to call this form.
5. Tick the box **Terms & Conditions**. This enables all the pages printed to be saved.
6. The Term & Conditions form has now been saved. You can view this form in the Spindle Document Distribution Tools under Form Manager.

7.8.3 Deleting existing forms

If you delete a form you must remove all references to it in Document Automation.

To delete a form

1. Launch Spindle Document Distribution Tools and select **Form Manager** from the shortcut bar.
2. In the tree window right-click on the form you want to delete and select **Delete Form** from the menu. You can also click the button from the Form Manager toolbar.
3. A dialog box will appear asking you to confirm that you want to delete the form. Click **Yes**.
4. The form has now been deleted.

7.8.4 Renaming forms

To rename a form

1. Launch Spindle Document Distribution Tools and select **Form Manager** from the shortcut bar.
2. In the tree window right-click on the form you want to rename and select **Rename Form** from the menu. You can also click the button from the Form Manager toolbar.
3. The form name in the tree window becomes highlighted.
4. Type in the new name of the form and press return.

5. The form has now been renamed.

or

1. Launch Spindle Document Distribution Tools and select **Form Manager** from the shortcut bar.
2. In the tree window left-click on the form you want to rename.
3. In the dialog window type in the new name of the form in the **Form name** edit box.
4. As soon as the edit window loses focus the form is renamed.

7.8.5 Importing and exporting forms

You can export and import forms using the Form Manager. This enables you to design and create forms and send them to other Spindle Document Distribution users, such as your clients.

To export a form

1. Launch Spindle Document Distribution Tools and select **Form Manager** from the shortcut bar.
2. In the tree window right-click on the form you want to export and select **Export Form** from the menu. You can also click the  button from the Form Manager toolbar.
3. When the **Save As** dialog box appears type in a name to save the file as. This will save the file as a Form Collection File with the extension .fmc
4. The form has been exported. You can now send this file to another Spindle Document Distribution user where they can import it in to another Spindle Document Distribution implementation.

To import a form

1. Launch Spindle Document Distribution Tools and select Form Manager from the shortcut bar.
2. In the tree window right-click anywhere and select **Import Form** from the menu. You can also press the  button from the Form Manager toolbar.
3. When the **Open** dialog box appears select the Form Collection file you want to import and click the **Open** button.
4. The form has been imported.

7.9 Device Manager

Spindle Document Distribution is a component based software application. By this we mean it can talk to many fax and email packages and archive data in a variety of ways. This is achieved by using Distribution Nodes and Distribution Devices.

Distribution Nodes

A distribution node is a method of distributing data, for example printing or faxing. Spindle Document Distribution supports the following ways of distributing:

- Printing
- Faxing
- Emailing
- Archiving
- CRM

Distribution Device

A distribution device is an interface to a hardware or a software package that can distribute data and allows Spindle

Document Distribution to communicate to that package or application. Each device is linked to a particular type of distribution node.

Device Manager

The Device Manager enables you to configure the individual fax, email, archive and other solutions used by the user. The Device Manager only affects the settings on the current computer. To affect the settings on other computers you must be at the physical computer. You only need to configure the devices used by this user and those used in the Document Automation rules.

Note: Most devices will require the fax, email or other solution to already be installed. For example, if you are configuring the Tobit FaxWare device, you need to have the Tobit FaxWare client installed on the computer first.

Archive Devices

Name	Description
PDF File Archive (see page 174)	Archives documents as Adobe PDF documents in a directory and optionally creates a corresponding CSV (Comma Separated Values) file. For further information see the PDF Archive (see page 96) section. Please see the PDF File Archive CSV file format (see page 176) section for details on the CSV file.
Microsoft SharePoint (see page 177)	Enables archiving of documents in to Microsoft SharePoint document libraries. Please see the Microsoft SharePoint Archive (see page 101) section for further information.
INVU Link Manager (see page 179)	Enables archiving of documents in to INVU Professional Series document management system using the INVU Link Manager. You will need to configure the INVU Link manager to monitor the output directory and to match the required indexes with the CSV file output by Spindle Document Distribution. Please see the INVU Link Manager Archive (see page 111) section for further information. See the INVU Link Manager CSV file format (see page 180) section for details on the CSV file.
Spindle Document Capture (see page 182)	The Spindle Document Capture Archive Device is used to set the default properties used in creating Spindle Document Capture archives in the Archive Manager.
Sage 200 2013+ (see page 182)	The Sage 200 2013+ Archive Device is used to set the default properties used in creating Sage 200 archives in the Archive Manager.

Email Devices

Name	Description
Outlook 2000-2016 (see page 155)	Sends emails using Microsoft Outlook, bypassing the security dialog boxes Microsoft added in Outlook 2000 SP2 to prevent 3rd-party applications automatically sending emails. This device bypasses the Outlook security dialog, enabling you to send emails without any user intervention.
Microsoft Exchange/Office 365 (see page 157)	Sends emails going directly through a Microsoft Exchange server, bypassing any email client. Additionally, this device supports Microsoft Exchange Online which can be either the stand-alone Exchange Online server or as part of Office 365.
IBM Lotus Notes (see page 161)	Sends emails using the IBM Lotus Notes client. To use this device you must have the Lotus Notes client installed on your computer and have a connection to a Lotus Domino server.
SMTP (see page 162)	Sends email using any SMTP (Simple Mail Transfer Protocol) compliant email server. SMTP is the defacto standard for email transmissions across the Internet. You can use this device to send emails directly to your Internet Service Provider's (ISP) mail server.
MAPI (see page 165)	Sends email using any Simple MAPI compliant email client.
Tobit David (see page 166)	Sends email using the Tobit David email server.

Legacy Outlook 2000-2016 (see page 167)	Sends emails using Microsoft Outlook. **Note:** This is a legacy device and you are advised to use the Outlook 2000-2016 (see page 155) device as this disables any security dialog boxes produced by Outlook. You should only use this device if you are having an issue using the Outlook 2000-2016 device.

Fax Devices

Name	Description
Microsoft Fax (see page 168)	Sends faxes using the Microsoft Fax printer driver component which is included free as part of the Windows operating system.
GFi FAXmaker (see page 169)	Sends faxes using GFi FAXmaker.
Tobit FaxWare/David (see page 170)	Sends faxes using Tobit FaxWare or Tobit David.
RedRock FaxNow! (see page 171)	Send faxes using RedRock FaxNow!
Microsoft SBS 2000 (see page 172)	Sends faxes using the Microsoft Small Business Server Shared Fax printer driver component which is included free as part of the Windows Small Business Server.
Microsoft SBS 2003 (see page 172)	Sends faxes using the Microsoft Small Business Server Shared Fax printer driver component which is included free as part of the Windows Small Business Server.
WinFax Pro 10 (see page 173)	Sends faxes using WinFax PRO. **Note:** WinFax PRO is no longer supported by Symantec and we highly recommend you upgrade to another faxing solution such as GFi FAXmaker.
Zetafax (see page 174)	Send faxes using Zetafax.

Print Devices

Name	Description
Standard Printer (see page 155)	Enables Spindle Document Distribution to print documents to virtually any Windows printer driver.

7.9.1 Print Devices

7.9.1.1 Standard Printer

Enables Spindle Document Distribution to print documents to virtually any Windows printer driver.

Capabilities

Not applicable

Configuration

No configuration is required for this device.

Supported Versions

- Virtually any Windows printer driver

7.9.2 Email Devices

7.9.2.1 Outlook 2000-2016

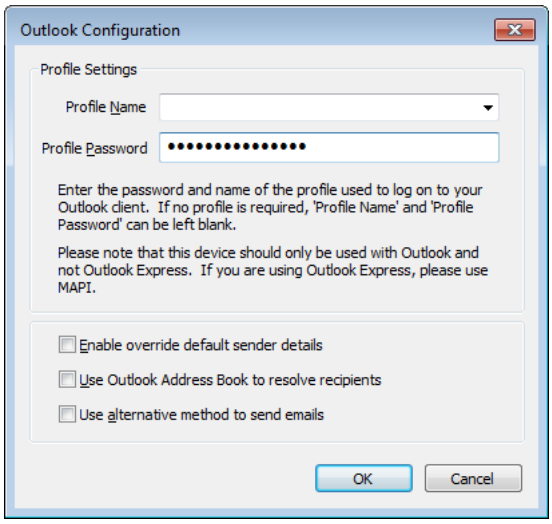
Sends emails using Microsoft Outlook, bypassing the security dialog boxes Microsoft added in Outlook 2000 SP2 to prevent

3rd-party applications automatically sending emails. This device bypasses the Outlook security dialog, enabling you to send emails without any user intervention.

Capabilities

- **Send email as HTML**
- **Override default sender details**
- **Place emails on hold**
- **Request read receipt**
- **Set message importance**

Configuration



In general you do not need to configure this device as it will use the default profile on your computer. To use the default profile press OK when the dialog box appears.

Profile name

Select the profile that you want Spindle Document Distribution to use when it logs on to Outlook. To use the default profile (recommended) leave this selection blank.

Profile password

Enter the password for the profile you have selected. If you are using the default profile (recommended) you do not need to enter your password.

Enable override default sender details

If you want to use the 'Override default sender details' (see page 83) feature in a document operation you need to tick this option. This will allow you to change the reply-to details on emails sent using this device, as long as the email account exists on the Exchange server.

Use Outlook Address Book to resolve recipients

Ticking this option means Spindle Document Distribution will validate the recipient specified in the ##EMAIL command against the Outlook Address Book.

Use alternative method to send emails

If you are experiencing any problems with distributing emails through this device, you can tick this option to switch to another method of sending emails.

Supported Versions

- Microsoft Outlook 2000
- Microsoft Outlook 2002
- Microsoft Outlook 2003
- Microsoft Outlook 2007
- Microsoft Outlook 2010
- Microsoft Outlook 2013
- Microsoft Outlook 2016

7.9.2.2 Microsoft Exchange/Office 365

Sends emails going directly through a Microsoft Exchange server, bypassing any email client. Additionally, this device supports Microsoft Exchange Online which can be either the stand-alone Exchange Online server or as part of Office 365.

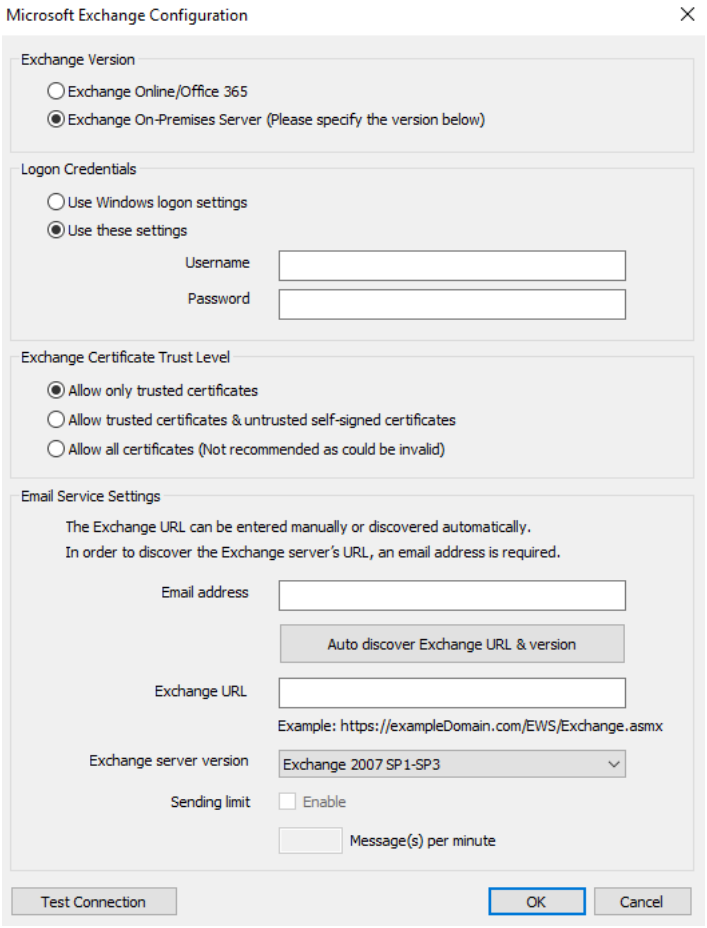
Capabilities

- **Send email as HTML**
- **Override default sender details**
- **Place emails on hold**
- **Request read receipt**
- **Set message importance**

Configuration

Select the Microsoft Exchange version you will be using, either Exchange Online/Office 365 or Exchange On-Premises server.

Exchange On-Premises Server



Logon Credentials

The Logon Credentials section is where you tell Spindle Document Distribution how to make the connection to the Exchange server. These settings also determine which user account is used to send emails via Spindle Document Distribution.

Use Windows logon settings

This option attempts to use the settings of the user logged on to the computer to connect to the Exchange server. If the user logs on to Windows with the same credentials they use to access their Exchange server, then select this option.

Use these settings

Select this option to specify the logon credentials to be used for the user. You can specify the user's credentials by entering their Username and Password.

Username

The logon name of the Windows user.

Password

Enter the password for the selected Windows account. This value is stored in an encrypted, unreadable format.

Exchange Certificate Trust Level

Every Exchange server uses certificates as a high level security mechanism for communication with the server, and to secure protocols such as SMTP, HTTP, POP and IMAP. In order for Spindle Document Distribution to make communication with the Exchange server's certificate, one of the following options must be selected;

Allow only trusted certificates

If the Exchange server certificate is valid and is trusted, then select this option. When we refer to a trusted certificate, we mean it chains up to the Trusted Root Certification Authorities store.

Note: This is the default option and is the most secure. Most commercial certificates conform to this requirement.

Allow trusted certificates & untrusted self-signed certificates

This option allows both a valid, trusted certificate and untrusted self-signed certificates to be accepted. A self-signed certificate is when the certificate's Issuer and the Subject of the certificate are the same. An untrusted certificate means the certificate does not chain up to the Trusted Root Certification Authorities store. This option does not allow invalid certificates, i.e. if the certificate has been revoked, or the certificate has exceeded its expiration date.

When Exchange server is initially installed, a self-signed untrusted certificate is provided by default, before a commercial certificate is applied, so this option is applicable in this environment.

Allow all certificates (Not recommended as could be invalid)

This option allows all certificates, whether valid or invalid, to be accepted.

Note: Be careful when using this option as it offers virtually no security. It is only recommended to use this option in temporary, exceptional circumstances.

Email Service Settings

These settings are used to create a connection to the Exchange server. The settings can be entered manually or discovered automatically. In order to automatically discover the Exchange server's URL, an email address is required.

Email address

Enter your On-Premises server Email address. This email address is used for the automatic discovery of the Exchange URL.

Note: By default, the first time you configure this device, the email address is obtained from the email address which was entered in the User Setup Wizard or the User Settings in the tools. You can override this setting by entering the email address here.

Auto discover Exchange URL & version

Click this button to automatically discover the Exchange URL and Exchange server version. In order to retrieve the correct Exchange URL and version, the user you are attempting the discovery for must be logged onto the same domain as the Exchange server. When retrieving the version, your credentials need to be correct and usable.

Note: The resultant settings will override any details you have already specified for the Exchange URL and Exchange server version.

Exchange URL

The Exchange URL is required to make a connection with the Exchange server. If the URL is already known, you can set it manually in this field.

For example; https://exampleDomain.com/EWS/Exchange.asmx

Alternatively, Spindle Document Distribution can automatically discover the correct Exchange URL by the clicking the 'Auto discover Exchange URL & version' button. As the location of the most suitable URL for a given user can change, for example when a new Client Access server is deployed, or can vary depending on the user, we recommend that you auto discover the settings.

Exchange server version

Select the correct version of your Exchange server from the drop down list. Spindle Document Distribution can automatically discover the correct version by the clicking the 'Auto discover Exchange URL & version' button.

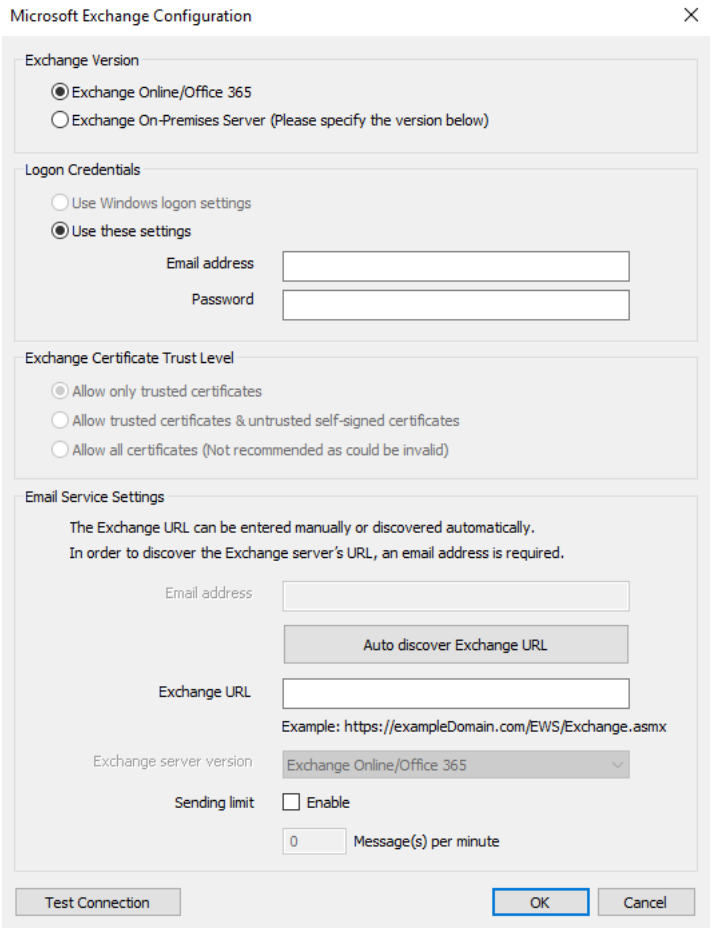
Sending Limit

Enabling this option allows the user to restrict the numbers of emails sent based on the Microsoft quota limit

Test Connection

Enables you to test the settings that have been entered are valid for the connection to Exchange.

Exchange Online/Office 365



Logon Credentials

The Logon Credentials section is where you tell Spindle Document Distribution how to make the connection to Exchange Online/Office 365. These settings determine which user account is used to send emails via Spindle Document Distribution.

Using Windows logon settings are not applicable to an Exchange Online/Office 365 setup, so this option is disabled.

Use these settings

Select this option to specify the logon credentials to be used for the user. You can specify the user's credentials by entering their Email Address and Password.

Email address

The email address of the Exchange Online/Office 365 account that you will be sending emails out from.

Password

Enter the password associated with the specified email address. This value is stored in an encrypted, unreadable format.

Exchange Certificate Trust Level

This section is not applicable to Exchange Online/Office 365, so it is disabled.

Email Service Settings

These settings are used to create a connection to Exchange Online/Office 365.

The settings can be entered manually or discovered automatically. In order to automatically discover the Exchange server's URL, an email address is required.

Email address

This email address is used for the automatic discovery of the Exchange URL. It is automatically populated with the Email address provided in the Logon Credentials.

Auto discover Exchange URL

Click this button to automatically discover the Exchange URL. To auto discover the URL, the logon credentials need to be correct and usable. For example, incorrect credentials mean you won't be able to fetch any information from the Exchange server.

Note: The resultant settings will override any details you have already specified for the Exchange URL.

Exchange URL

The Exchange URL is required to make the connection with the Exchange server. Spindle Document Distribution can automatically discover the correct Exchange URL by the clicking the 'Auto discover Exchange URL' button.

Exchange server version

This cannot be amended and the option is pre-populated with ‘Exchange Online/Office 365’.

Sending Limit

Enabling this option allows the user to restrict the numbers of emails sent based on the Microsoft quota limit

Test Connection

Enables you to test the settings that have been entered are valid for the connection to Exchange Online/Office 365.

Supported Versions

Exchange On-Premises

- Exchange 2007 SP1
- Exchange 2007 SP2
- Exchange 2007 SP3
- Exchange 2010
- Exchange 2010 SP1
- Exchange 2010 SP2
- Exchange 2010 SP3
- Exchange 2013
- Exchange 2016

Exchange Online/Office 365

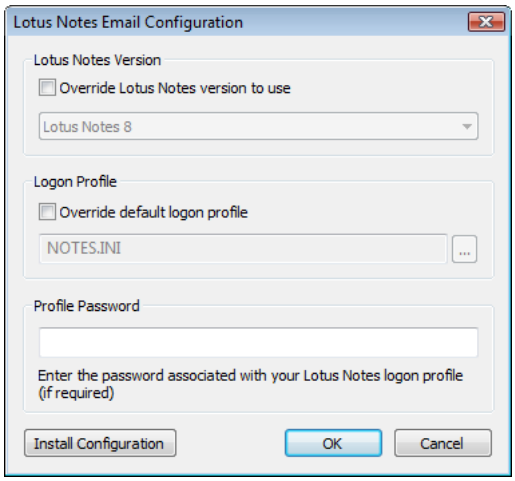
7.9.2.3 IBM Lotus Notes

Sends emails using the IBM Lotus Notes client. To use this device you must have the Lotus Notes client installed on your computer and have a connection to a Lotus Domino server.

Capabilities

- ☑ **Send email as HTML**
- ☐ **Override default sender details**
- ☑ **Place emails on hold**
- ☑ **Request read receipt (ONLY FUNCTIONS WHEN USED WITH OTHER LOTUS NOTES CLIENTS)**
- ☑ **Set message importance**

Configuration



Override Lotus Notes version to use

By default Spindle Document Distribution will attempt to auto-detect the version of the Lotus Notes Client automatically. Tick this option to override the auto-detection and manually select the required version from the drop-down list.

Override default logon profile

Spindle Document Distribution will automatically use the default email account profile on the client computer for sending emails. It is possible to select another logon profile by ticking this option and entering the path to a suitable .ini file containing the users account profile settings.

Profile Password

Enter the password for the selected email account profile. **Note:** this is the default profile, unless it has been explicitly overridden by the setting above.

Install Configuration

Installs the log-on extension add-in to the Lotus Notes client. This is necessary if you would like Spindle Document Distribution to automatically provide the password when performing a distribution. If the configuration is not installed, the password will have to be entered manually each time an email is sent using Spindle Document Distribution.

Supported Versions

- IBM Lotus Notes 6
- IBM Lotus Notes 7
- IBM Lotus Notes 8

7.9.2.4 SMTP

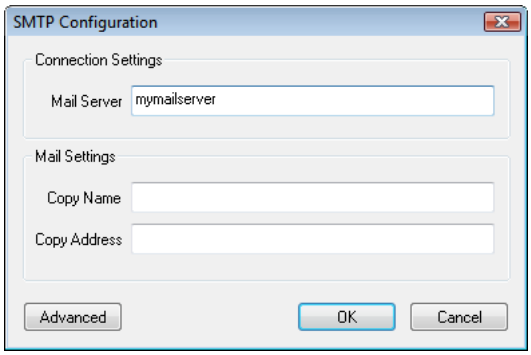
Sends email using any SMTP (Simple Mail Transfer Protocol) compliant email server. SMTP is the defacto standard for email transmissions across the Internet. You can use this device to send emails directly to your Internet Service Provider's (ISP) mail server.

Capabilities

- ☑ **Send email as HTML**
- ☑ **Override default sender details**
- ☐ **Place emails on hold**
- ☑ **Request read receipt**

Set message importance

Configuration



In general you do not need to configure this device as it will use the default profile on your computer. To use the default profile press OK when the dialog box appears.

Mail Server

Enter the name or IP address of the SMTP email server.

Copy Name

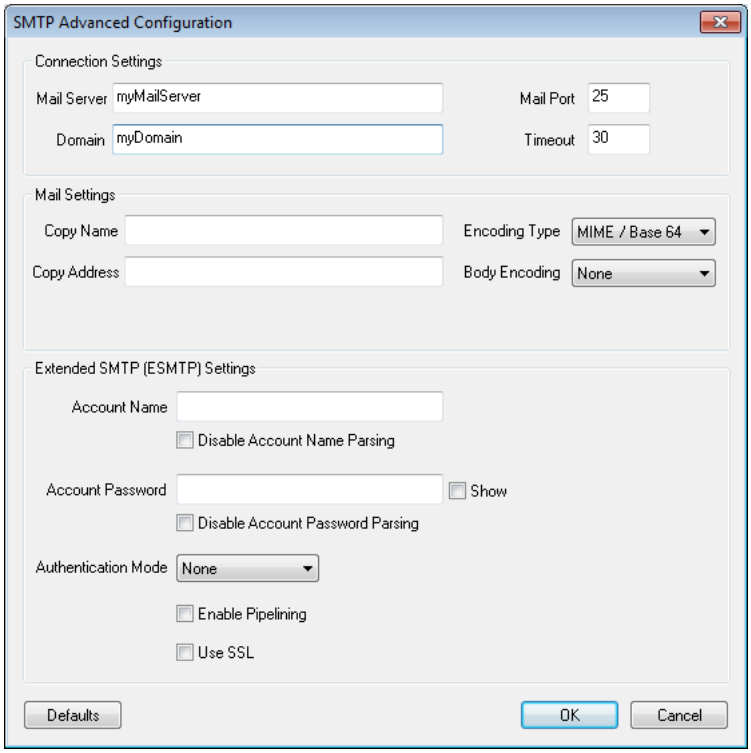
The name of the person you want to copy-in outgoing emails. This allows you to CC or copy-in a recipient to all emails going through the SMTP server. Using this feature you could send yourself a copy of all outgoing emails by entering your own email details here.

Copy Address

The email address of the person you want to copy-in outgoing emails.

Advanced

Use this section to configure more advanced settings for the SMTP server. Press the Advanced button to get to this dialog.



Domain

By default the domain is obtained from your email address which was entered in the User Setup Wizard (see page 22) or the User Settings (see page 189) in the tools. You can override this setting by entering the domain here. This is used to start a conversation with the SMTP server during the HELO command.

Mail Port

Specifies the port number used to communicate to the SMTP server. The default port is 25.

Timeout

This is the maximum amount of time in seconds that Spindle Document Distribution will wait for a response from the SMTP server before returning an error. The default value is 30 seconds.

Encoding Type

Sets the message format and encoding scheme. The options are either MIME/Base 64 or UUencoding.

Body Encoding

Sets the encoding options for the body text of a MIME formatted message. The options are None, Quoted Printable or Base 64.

Extended SMTP (ESMTP) Settings

ESMTP authentication is an extension to the SMTP protocol which enables a mail server to authenticate the mail sender. Only enter these settings if your SMTP mail servers requires extended authentication.

Account Name

The name of the account on the mail server you want to use for ESMTP authentication.

Spindle Document Distribution can parse any ## commands used in the Account Name field. This means you can set the Account Name via ## commands on your report designer. For example, on the report designer, a command like ##VAR5 could be set to 'testaccount@gmail.com'. By using ## commands for the account name (and password described below), you can dynamically specify, at the point of distribution, which email account would be used to send emails out.

You can then populate this 'Account Name' field in the SMTP Advanced dialog with, for example, ##VAR5##. At the point of distributing through Spindle Document Distribution, the command data in the field will be parsed and the account details extracted. The email can then go out from the specified email account.

Disable Account Name Parsing

By default this option is not enabled, so ## commands used in the Account Name field will be parsed by Spindle Document Distribution. If you would like to prevent Spindle Document Distribution from parsing the Account Name, enable this option. This means any # character(s) used in the field would be read literally.

Account Password

The password of the user account on the mail server.

The ##SMTPPASSWORD## command can be used to set this SMTP account password. On the report designer you can set the password by specifying the command and data, for example; ##SMTPPASSWORD abc123##.

This ##SMTPPASSWORD## command can then be used in this Account Password field in the SMTP Advanced dialog. Like the Account Name, at the point of distributing through Spindle Document Distribution, the command data in the field will be parsed and the account password extracted which means the email can go out from the specified email account.

Disable Account Password Parsing

By default this option is not enabled, so ## commands used in the Account Password field will be parsed by Spindle Document Distribution. The purpose of disabling the parsing on the password is for the event a user has password with ## in

it. Disabling the Account Password parsing (tick the checkbox) allows the # character(s) to be read literally.

Show

The Show checkbox, when enabled, displays the text that has been entered into the password field.

Authentication Mode

Specifies the ESMTP authentication mode. The options are None, AUTH LOGIN or CRAM-MD5. Consult your mail server administrator for more information.

Enable Pipelining

Pipelining is an ESMTP method which allows messages to be sent faster than with the regulations imposed by the basic SMTP protocol. Tick this box to enable this option.

Use SSL

The following table indicates the settings required for the main providers.

Service	Server	Port	SSL	Username	Password	Note
Gmail	smtp.gmail.com	465	Yes	Gmail email address	Gmail password	Maximum of 2000 outgoing emails per day
Hotmail	smtp.live.com	465	Yes	Hotmail email address	Hotmail Password	Maximum of 300 outgoing emails per day
Yahoo!	mail.yahoo.com	464	Yes	Yahoo! email address	Yahoo! Password	Maximum of 500 outgoing emails per day

Supported Versions

- Microsoft Exchange Server 5.5
- Microsoft Exchange Server 2000
- Microsoft Exchange Server 2003
- Microsoft Exchange Server 2007
- Any SMTP compliant email server

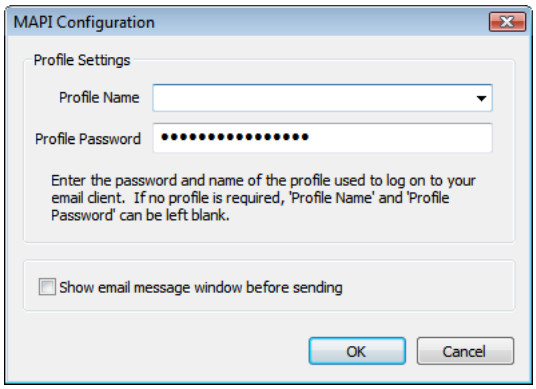
7.9.2.5 MAPI

Sends email using any Simple MAPI compliant email client.

Capabilities

- ☐ **Send email as HTML**
- ☐ **Override default sender details**
- ☑ **Place emails on hold**
- ☐ **Request read receipt**
- ☑ **Set message importance**

Configuration



In general you do not need to configure this device as it will use the default profile on your computer. To use the default profile press OK when the dialog box appears.

Profile name

Select the profile that you want Spindle Document Distribution to use when it logs on to your email program. To use the default profile (recommended) leave this selection blank.

Profile password

Enter the password for the profile you have selected. If you are using the default profile (recommended) you do not need to enter your password.

Show email message window before sending

By default Spindle Document Distribution will automatically send any emails through MAPI without stopping and asking for user confirmation. If you would prefer to see the email before it is sent then enable this tick box.

Supported Versions

- Outlook Express
- Any Simple MAPI compliant email client

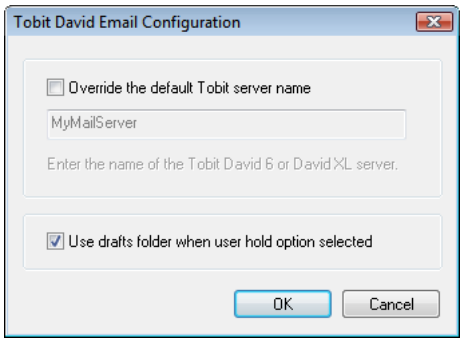
7.9.2.6 Tobit David

Sends email using the Tobit David email server.

Capabilities

- ✔ **Send email as HTML**
- ✔ **Override default sender details**
- ✔ **Place emails on hold**
- ✔ **Request read receipt**
- ✔ **Set message importance**

Configuration



In general you do not need to configure this device as it will use the default settings stored on your computer. To use the default settings press OK when the dialog box appears.

Override the default Tobit server name

Spindle Document Distribution will automatically use the default Tobit David mail server your Tobit client is currently using. To override this server, tick the check box and enter the name of the server where the Tobit David mail server is running.

Use drafts folder when user hold option selected

By default this option is ticked. When the "user hold" option is selected in document automation, all emails will be placed in the David client drafts folder. If not ticked, all emails will be placed in the jobs queue, but still on hold.

Supported Versions

- Tobit David 6.6
- Tobit David XL
- Tobit David Zehn!

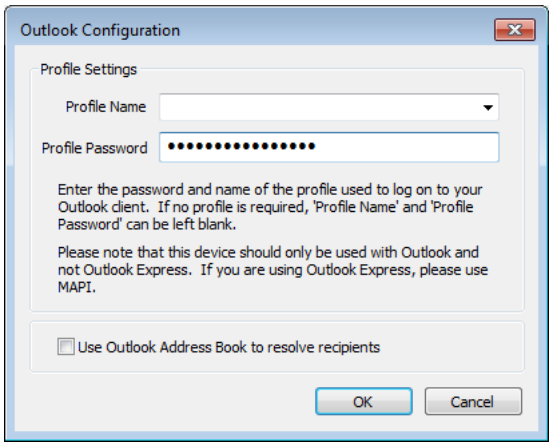
7.9.2.7 Legacy Outlook 2000-2016

Sends emails using Microsoft Outlook. **Note:** This is a legacy device and you are advised to use the Outlook 2000-2016 (see page 155) device as this disables any security dialog boxes produced by Outlook. You should only use this device if you are having an issue using the Outlook 2000-2016 device.

Capabilities

- ☑ **Send email as HTML**
- ☐ **Override default sender details**
- ☑ **Place emails on hold**
- ☑ **Request read receipt**
- ☑ **Set message importance**

Configuration



In general you do not need to configure this device as it will use the default profile on your computer. To use the default profile press OK when the dialog box appears.

Profile name

Select the profile that you want Spindle Document Distribution to use when it logs on to Outlook. To use the default profile (recommended) leave this selection blank.

Profile password

Enter the password for the profile you have selected. If you are using the default profile (recommended) you do not need to enter your password.

Use Outlook Address Book to resolve recipients

Enabling this option allows Spindle Document Distribution to validate the recipient specified in the ##EMAIL command against the Outlook Address Book.

Supported Versions

- Microsoft Outlook 2000
- Microsoft Outlook 2002
- Microsoft Outlook 2003
- Microsoft Outlook 2007
- Microsoft Outlook 2010
- Microsoft Outlook 2013
- Microsoft Outlook 2016

7.9.3 Fax Devices

7.9.3.1 Microsoft Fax

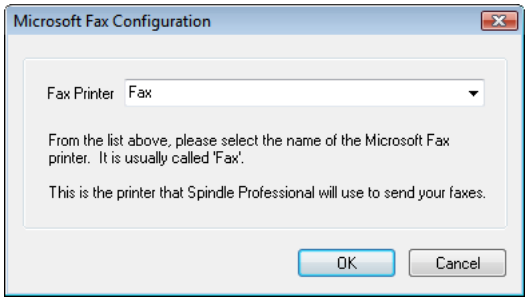
Sends faxes using the Microsoft Fax printer driver component which is included free as part of the Windows operating system.

Capabilities

- **Place faxes on hold**

- **Set priority**
- **Schedule sending of faxes**

Configuration



Fax Printer

Select the Windows Fax printer driver which Spindle Document Distribution will use to generate the faxes. The name of the printer is usually 'Fax'. If you are using Windows Server 2003 and are running on Windows XP or above you can also use this device to send faxes to the shared fax service on Windows Server 2003.

Supported Versions

- Microsoft Fax on Windows 2000
- Microsoft Fax on Windows XP
- Microsoft Fax on Windows Server 2003
- Microsoft Fax on Windows Vista
- Microsoft Fax on SBS 2008 and 2011

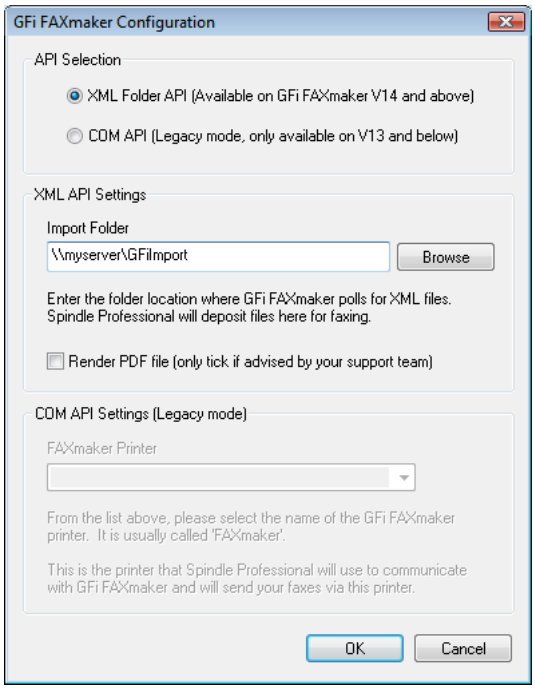
7.9.3.2 GFi FAXmaker

Sends faxes using GFi FAXmaker.

Capabilities

- **Place faxes on hold**
- **Set priority**
- **Schedule sending of faxes**

Configuration



API Selection

This selection depends on the version of GFi FAXmaker you are using. Select XMP Folder API if you are using V14 and above or COM API if you are using V12 and below. Various settings are available depending on your selection.

XML API Settings

Configures the device for sending faxes through FAXmaker using the XML import directory. To use this you will need to enable the XML import option on your GFi FAXmaker server. Once enabled and configured on your server you can send faxes by 'dropping' files into this import directory.

Import Folder

This is the location of the XML import folder where Spindle Document Distribution will generate the outgoing fax as a PDF file along with a corresponding XML file. This will be picked up by the GFi FAXmaker server and delivered to the fax recipient.

Render PDF file

Only use this option if advised by a support engineer.

COM API Settings (Legacy mode)

Configures the device for sending faxes through the FAXmaker printer driver.

FAXmaker Printer

Select the FAXmaker printer driver which Spindle Document Distribution will use to generate the faxes. The name of the printer is usually 'FAXmaker'.

Supported Versions

- GFi FAXmaker for for Exchange/SMTP V12 / V14
- GFI FAXmaker V10 / V11

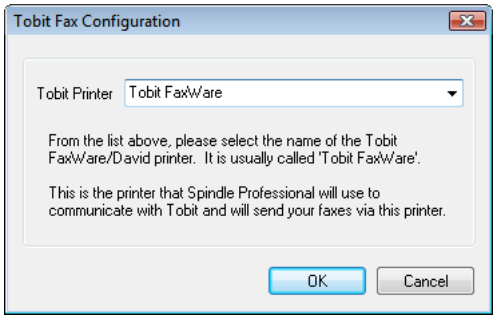
7.9.3.3 Tobit FaxWare/David

Sends faxes using Tobit FaxWare or Tobit David.

Capabilities

- ☑ **Place faxes on hold**
- ☑ **Set priority**
- ☑ **Schedule sending of faxes**

Configuration



Faxes are sent using the applications printer driver which is installed on the client computer and can be found in the printers list.

Tobit Printer

Select the FaxWare printer driver which Spindle Document Distribution will use to generate the faxes. The name of the printer is usually 'Tobit FaxWare'.

Supported Versions

- Tobit FaxWare V6 / V7 / Zehn
- Tobit David 6.6
- Tobit David XL
- Tobit David Zehn!

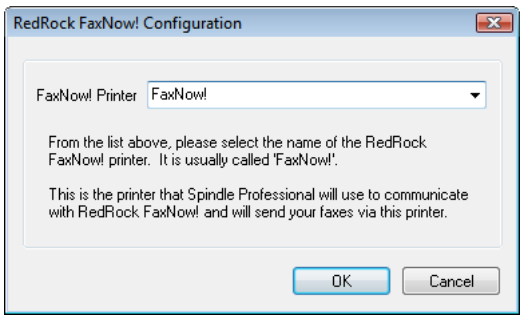
7.9.3.4 RedRock FaxNow!

Send faxes using RedRock FaxNow!

Capabilities

- ☐ **Place faxes on hold**
- ☐ **Set priority**
- ☐ **Schedule sending of faxes**

Configuration



Faxes are sent using the applications printer driver which is installed on the client computer and can be found in the printers list.

FaxNow! Printer

Select the FaxNow! printer driver which Spindle Document Distribution will use to generate the faxes. The name of the printer is usually 'FaxNow!'.

Supported Versions

- RedRock FaxNow! V5.5

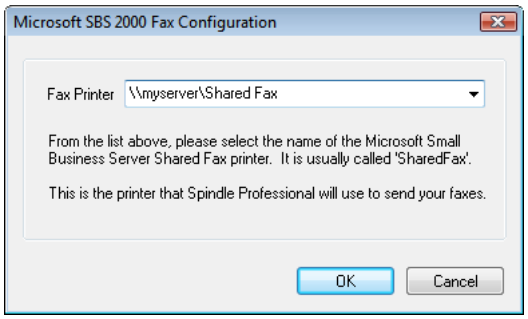
7.9.3.5 Microsoft SBS 2000

Sends faxes using the Microsoft Small Business Server Shared Fax printer driver component which is included free as part of the Windows Small Business Server.

Capabilities

- **Place faxes on hold**
- **Set priority**
- **Schedule sending of faxes**

Configuration



Faxes are sent using the Shared Fax printer driver which is installed on the client computer and can be found in the printers list.

Fax Printer

Select the SBS shared fax printer driver which Spindle Document Distribution will use to generate the faxes. The name of the printer is usually 'Fax'.

Supported Versions

- Microsoft Small Business Server 2000

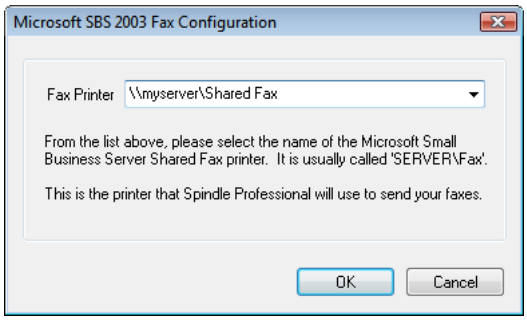
7.9.3.6 Microsoft SBS 2003

Sends faxes using the Microsoft Small Business Server Shared Fax printer driver component which is included free as part of the Windows Small Business Server.

Capabilities

- **Place faxes on hold**
- **Set priority**
- **Schedule sending of faxes**

Configuration



Faxes are sent using the Shared Fax printer driver which is installed on the client computer and can be found in the printers list.

Fax Printer

Select the SBS shared fax printer driver which Spindle Document Distribution will use to generate the faxes. The name of the printer is usually 'Fax'.

Supported Versions

- Microsoft Small Business Server 2003

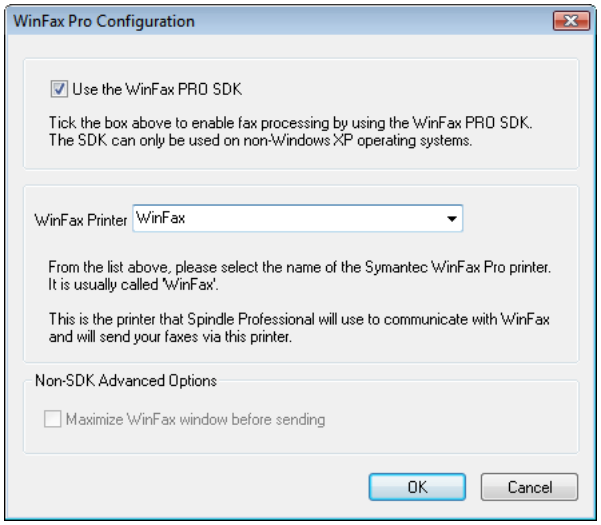
7.9.3.7 WinFax Pro 10

Sends faxes using WinFax PRO. **Note:** WinFax PRO is no longer supported by Symantec and we highly recommend you upgrade to another faxing solution such as GFi FAXmaker.

Capabilities

- **Place faxes on hold**
- **Set priority**
- **Schedule sending of faxes**

Configuration



Faxes are sent using the applications printer driver which is installed on the client computer and can be found in the printers list.

WinFax Printer

Select the WinFax printer driver which Spindle Document Distribution will use to generate the faxes. The name of the printer is usually 'WinFax'.

Supported Versions

- Symantec WinFax PRO V10.02

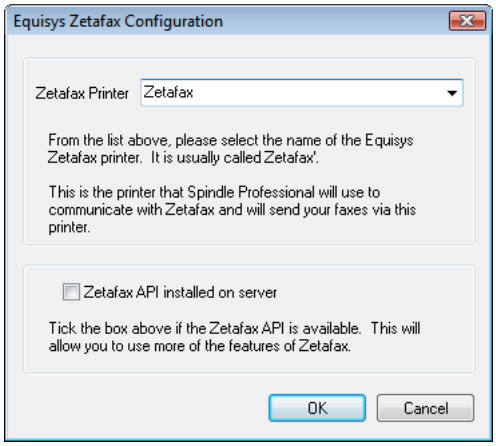
7.9.3.8 Zetafax

Send faxes using Zetafax.

Capabilities

- ✔ **Place faxes on hold (ONLY AVAILABLE IF YOU HAVE PURCHASED THE ZETAFAX API)**
- ✔ **Set priority (ONLY AVAILABLE IF YOU HAVE PURCHASED THE ZETAFAX API)**
- ✔ **Schedule sending of faxes (ONLY AVAILABLE IF YOU HAVE PURCHASED THE ZETAFAX API)**

Configuration



Faxes are sent using the applications printer driver which is installed on the client computer and can be found in the printers list.

Supported Versions

- Zetafax V8 onwards

7.9.4 Archive Devices

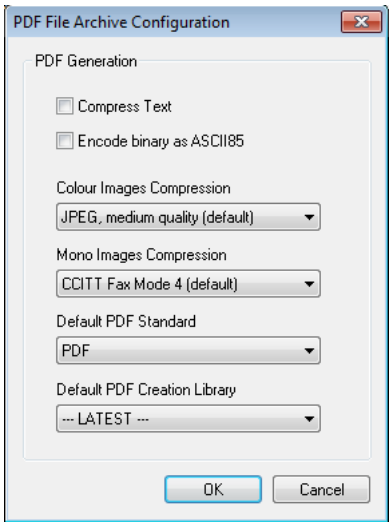
7.9.4.1 PDF File Archive

Archives documents as Adobe PDF documents in a directory and optionally creates a corresponding CSV (Comma Separated Values) file. For further information see the PDF Archive (see page 96) section. Please see the PDF File Archive CSV file format (see page 176) section for details on the CSV file.

Capabilities

- ✔ Archive as PDF documents
- ✔ Generates a CSV (Comma Separated Values) file

Configuration



PDF Generation

This section allows you to alter the parameters for the creation of PDF files. By default Spindle Document Distribution has already selected the most reasonable settings to maximise quality yet still produce reasonable sized PDF files.

Compress Text

Tick to compress the text within the PDF file. This should result in a smaller file size.

Encode binary as ASCII85

Ticking this option will encode information in the ASCII format. This will result in a larger file size.

Colour Images Compression

Sets the compression rate for colour images within the PDF file. A higher compression rate will reduce the file size but will also result in lower image quality.

Mono Images Compression

Sets the compression rate for mono images within the PDF file.

Default PDF Standard

This sets the PDF standard to be used on the processed document that is produced by Spindle Document Distribution. There are two options that can be selected from the Default PDF Standard drop down. These options are;

PDF

Selecting this option means a normal PDF file will be created.

PDF/A-1b

Select this option to produce a PDF file that conforms to the PDF/A-1b standard. The PDF/A-1b standard is a level of PDF/A compliance, which is used for the long-term preservation of digital documents.

Note: Only the PDF creation library v4.0.207 and later versions support the PDF/A-1b standard. If you attempt to select the PDF/A-1b option with an incompatible library version, you will be warned and advised to change the PDF Creation library to one that is supported.

Default PDF Creation Library

Spindle Document Distribution is used with a vast variety of documents and there have been occasions where documents have not rendered consistently between versions of the PDF library. The Default PDF Creation Library choice allows us to move forward by default to the latest version of the library and provide for alternative PDF rendering to be established for any problematic document type.

Note: Please be aware that the v4 PDF libraries offer a higher degree of PDF document protection as they use AES-256 encryption. The v3 PDF libraries use 40-bit RC4 encryption, which is not as up-to-date.

Supported Versions

- All versions of Windows

7.9.4.1.1 PDF File Archive CSV file format

The CSV (Comma Separated Values) file generated by this device contains various information on the document. The format of the file is as follows:

Output Value
Version of the CSV file generated, currently 1.00
Name of the archive as stored in the archive manager
The subject title used in this operation
Value of ##NAME##
Value of ##COMPANY##
Value of ##VAR1 (see page 246)##
Value of ##VAR2 (see page 246)##
Value of ##VAR3 (see page 246)##
Value of ##VAR4 (see page 246)##
Value of ##VAR5 (see page 246)##
Value of ##VAR6 (see page 246)##
Value of ##VAR7 (see page 246)##
Value of ##VAR8 (see page 246)##
Value of ##VAR9 (see page 246)##
Value of ##VAR10 (see page 246)##
Value of ##VAR11 (see page 246)##
Value of ##VAR12 (see page 246)##
Value of ##VAR13 (see page 246)##
Value of ##VAR14 (see page 246)##
Value of ##VAR15 (see page 246)##
Value of ##VAR16 (see page 246)##
Value of ##VAR17 (see page 246)##
Value of ##VAR18 (see page 246)##
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Value of ##VAR27 (see page 246)##
Value of ##VAR28 (see page 246)##

Value of ##VAR29 (see page 246)##
Value of ##VAR30 (see page 246)##
Value of ##EMAIL##
Value of ##FAX##
Value of ##CFG##
Value of ##USER##
Value of ##USER##
Value of ##TIME##
Value of ##DATE##

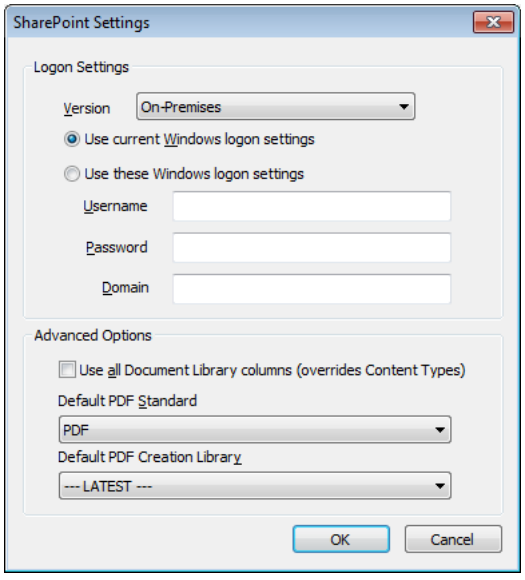
7.9.4.2 Microsoft SharePoint

Enables archiving of documents in to Microsoft SharePoint document libraries. Please see the Microsoft SharePoint Archive (see page 101) section for further information.

Capabilities

- ☑ Archive as PDF documents
- ☐ Generates a CSV (Comma Separated Values) file

Configuration



Version

Select either 'Online' or 'On-Premises' depending on your version of SharePoint.

If you have SharePoint 2013 Online (standalone on a plan) or SharePoint with Office 365, select 'Online'. If you have a hosted version of SharePoint, please check with your hosting company as to whether your SharePoint is truly Online or if they are hosting your SharePoint server. If your version of SharePoint uses Windows Authentication to connect, then you are on an On-Premises version of SharePoint.

Online

If you select the Version as 'Online', Spindle Document Distribution will use Forms based Authentication to connect to SharePoint. You will need to provide the Username and Password credentials of the SharePoint user that you want to archive the documents under. This user must have the relevant permissions in SharePoint.

On-Premises

If you select 'On-Premises', Spindle Document Distribution will use Windows Authentication to connect to SharePoint. You can either select 'Use current Windows logon settings' or 'Use these Windows logon settings' if you would like to specify the logon credentials.

Use current Windows logon settings

Attempts to use the settings of the user logged on to the computer when Spindle Document Distribution is processing the document. To use this option your logon details to the SharePoint site must be the same as your logon details to your computer/domain.

Use these Windows logon settings

Use this option if you want to use a specific Windows user to logon onto your SharePoint site. For example, on your domain you could have a user called 'Spindle Document Distribution' and always use this user to archive files. This way, in SharePoint you could easily distinguish when a document was archived by Spindle Document Distribution or by a normal user.

Username

The logon name of the Windows user to use.

Password

The users password. This value is stored in an encrypted, unreadable format.

Domain

The domain of the Windows user.

Use all Document Library columns (overrides Content Types)

All of the columns or 'meta-data' defined for a Document Library will be displayed in the 'Columns' tab of the SharePoint archive, and can have values assigned to them. **Note:** This setting overrides Content Types so the 'Select Content Type' drop down will be disabled in the 'Columns' tab of the SharePoint archive.

Default PDF Standard

This sets the PDF standard to be used on the processed document that is produced by Spindle Document Distribution. There are two options that can be selected from the Default PDF Standard drop down. These options are;

PDF

Selecting this option means a normal PDF file will be created.

PDF/A-1b

Select this option to produce a PDF file that conforms to the PDF/A-1b standard. The PDF/A-1b standard is a level of PDF/A compliance, which is used for the long-term preservation of digital documents.

Note: Only the PDF creation library v4.0.207 and later versions support the PDF/A-1b standard. If you attempt to select the PDF/A-1b option with an incompatible library version, you will be warned and advised to change the PDF Creation library to one that is supported.

Default PDF Creation Library

Spindle Document Distribution is used with a vast variety of documents and there have been occasions where documents have not rendered consistently between versions of the PDF library. The Default PDF Creation Library choice allows us to move forward by default to the latest version of the library and provide for alternative PDF rendering to be established for any problematic document type.

Note: Please be aware that the v4 PDF libraries offer a higher degree of PDF document protection as they use AES-256 encryption. The v3 PDF libraries use 40-bit RC4 encryption, which is not as up-to-date.

Supported Versions

- Microsoft Windows SharePoint Services V2.0
- Microsoft Windows SharePoint Services V3.0
- Microsoft SharePoint Server 2007
- Microsoft SharePoint Foundation & Server 2010
- Microsoft SharePoint Foundation & Server 2013
- Microsoft SharePoint Foundation & Server 2016
- Microsoft SharePoint Online

7.9.4.3 INVU Link Manager

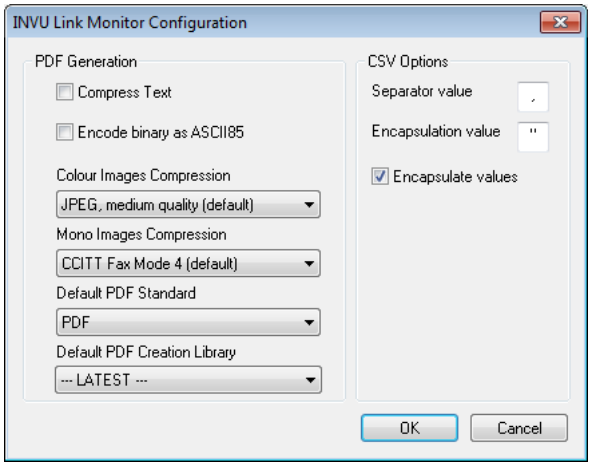
Enables archiving of documents in to INVU Professional Series document management system using the INVU Link Manager. You will need to configure the INVU Link manager to monitor the output directory and to match the required indexes with the CSV file output by Spindle Document Distribution.

Please see the INVU Link Manager Archive (see page 111) section for further information. See the INVU Link Manager CSV file format (see page 180) section for details on the CSV file.

Capabilities

- ✔ Archive as PDF documents
- ✔ Generates a CSV (Comma Separated Values) file

Configuration



PDF Generation

This section allows you to alter the parameters for the creation of PDF files when archiving into Invu. By default Spindle Document Distribution has already selected the most reasonable settings to maximise quality yet still produce reasonable sized PDF files.

Compress Text

Tick to compress the text within the PDF file. This should result in a smaller file size.

Encode binary as ASCII85

Ticking this option will encode information in the ASCII format. This will result in a larger file size.

Colour Images Compression

Sets the compression rate for colour images within the PDF file. A higher compression rate will reduce the file size but will

also result in lower image quality.

Mono Images Compression

Sets the compression rate for mono images within the PDF file.

Default PDF Standard

This sets the PDF standard to be used on the processed document that is produced by Spindle Document Distribution. There are two options that can be selected from the Default PDF Standard drop down. These options are;

PDF

Selecting this option means a normal PDF file will be created.

PDF/A-1b

Select this option to produce a PDF file that conforms to the PDF/A-1b standard. The PDF/A-1b standard is a level of PDF/A compliance, which is used for the long-term preservation of digital documents.

Note: Only the PDF creation library v4.0.207 and later versions support the PDF/A-1b standard. If you attempt to select the PDF/A-1b option with an incompatible library version, you will be warned and advised to change the PDF Creation library to one that is supported.

Default PDF Creation Library

Spindle Document Distribution is used with a vast variety of documents and there have been occasions where documents have not rendered consistently between versions of the PDF library. The Default PDF Creation Library choice allows us to move forward by default to the latest version of the library and provide for alternative PDF rendering to be established for any problematic document type.

Note: Please be aware that the v4 PDF libraries offer a higher degree of PDF document protection as they use AES-256 encryption. The v3 PDF libraries use 40-bit RC4 encryption, which is not as up-to-date.

CSV Options

This section allows you to customise the output options for the CSV (Comma Separated Values) file.

Separator value

The character used to separate each value in the CSV file. By default the comma [,] character is used.

Encapsulation value

The character used to encapsulate each value in the CSV file. This character is placed at the beginning and end of each value. By default the double quotes ["] character is used.

Encapsulate values

Tick this box to use the character specified above to encapsulate each value. If you do not want to encapsulate the values make sure this box is un-ticked.

Supported Versions

- INVU Series 6
- INVU Series 5

7.9.4.3.1 INVU Link Manager CSV File Format

The CSV (Comma Separated Values) file generated by this device contains various information on the document. The format of the file is as follows:

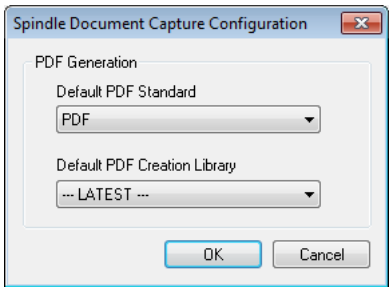
Output Value
Version of the CSV file generated, currently 1.00

Name of the archive as stored in the archive manager
The subject title used in this operation
Value of ##NAME##
Value of ##COMPANY##
Value of ##VAR1 (see page 246)##
Value of ##VAR2 (see page 246)##
Value of ##VAR3 (see page 246)##
Value of ##VAR4 (see page 246)##
Value of ##VAR5 (see page 246)##
Value of ##VAR6 (see page 246)##
Value of ##VAR7 (see page 246)##
Value of ##VAR8 (see page 246)##
Value of ##VAR9 (see page 246)##
Value of ##VAR10 (see page 246)##
Value of ##VAR11 (see page 246)##
Value of ##VAR12 (see page 246)##
Value of ##VAR13 (see page 246)##
Value of ##VAR14 (see page 246)##
Value of ##VAR15 (see page 246)##
Value of ##VAR16 (see page 246)##
Value of ##VAR17 (see page 246)##
Value of ##VAR18 (see page 246)##
Value of ##VAR19 (see page 246)##
Value of ##VAR20 (see page 246)##
Value of ##VAR21 (see page 246)##
Value of ##VAR22 (see page 246)##
Value of ##VAR23 (see page 246)##
Value of ##VAR24 (see page 246)##
Value of ##VAR25 (see page 246)##
Value of ##VAR26 (see page 246)##
Value of ##VAR27 (see page 246)##
Value of ##VAR28 (see page 246)##
Value of ##VAR29 (see page 246)##
Value of ##VAR30 (see page 246)##
Value of ##EMAIL##
Value of ##FAX##
Value of ##CFG##
Value of ##USER##
Value of ##USER##
Value of ##TIME##
Value of ##DATE##

7.9.4.4 Spindle Document Capture

The Spindle Document Capture Archive Device is used to set the default properties used in creating Spindle Document Capture archives in the Archive Manager.

Configuration



PDF Generation

This section allows you to alter the parameters for the creation of PDF files.

Default PDF Standard

This sets the PDF standard to be used on the processed document that is produced by Spindle Document Distribution. There are two options that can be selected from the Default PDF Standard drop down. These options are;

PDF

Selecting this option means a normal PDF file will be created.

PDF/A-1b

Select this option to produce a PDF file that conforms to the PDF/A-1b standard. The PDF/A-1b standard is a level of PDF/A compliance, which is used for the long-term preservation of digital documents.

Note: Only the PDF creation library v4.0.207 and later versions support the PDF/A-1b standard. If you attempt to select the PDF/A-1b option with an incompatible library version, you will be warned and advised to change the PDF Creation library to one that is supported.

Default PDF Creation Library

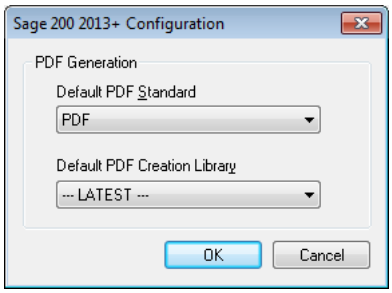
Spindle Document Distribution is used with a vast variety of documents and there have been occasions where documents have not rendered consistently between versions of the PDF library. The Default PDF Creation Library choice allows us to move forward by default to the latest version of the library and provide for alternative PDF rendering to be established for any problematic document type.

Note: Please be aware that the v4 PDF libraries offer a higher degree of PDF document protection as they use AES-256 encryption. The v3 PDF libraries use 40-bit RC4 encryption, which is not as up-to-date.

7.9.4.5 Sage 200 2013+

The Sage 200 2013+ Archive Device is used to set the default properties used in creating Sage 200 archives in the Archive Manager.

Configuration



PDF Generation

This section allows you to alter the parameters for the creation of PDF files.

Default PDF Standard

This sets the PDF standard to be used on the processed document that is produced by Spindle Document Distribution. There are two options that can be selected from the Default PDF Standard drop down. These options are;

PDF

Selecting this option means a normal PDF file will be created.

PDF/A-1b

Select this option to produce a PDF file that conforms to the PDF/A-1b standard. The PDF/A-1b standard is a level of PDF/A compliance, which is used for the long-term preservation of digital documents.

Note: Only the PDF creation library v4.0.207 and later versions support the PDF/A-1b standard. If you attempt to select the PDF/A-1b option with an incompatible library version, you will be warned and advised to change the PDF Creation library to one that is supported.

Default PDF Creation Library

Spindle Document Distribution is used with a vast variety of documents and there have been occasions where documents have not rendered consistently between versions of the PDF library. The Default PDF Creation Library choice allows us to move forward by default to the latest version of the library and provide for alternative PDF rendering to be established for any problematic document type.

Note: Please be aware that the v4 PDF libraries offer a higher degree of PDF document protection as they use AES-256 encryption. The v3 PDF libraries use 40-bit RC4 encryption, which is not as up-to-date.

7.9.5 CRM Devices

CRM devices allow you to either link a previously archived document against a company contact, or to copy and store a previously archived document against a company contact. The differences between a linked and stored document are explained below.

Linked document

The CRM system stores a link or path to the archived document but does not keep a copy of the document itself. For example, if you were to archive a document under the path 'C:\My Archives\Quote 025593.pdf', then the CRM would store the path string in its own database and would retrieve the file from the path when requested. If you were to delete the file from the folder then the CRM system would no longer be able to access or display the file.

Stored document

With a stored document the CRM will take a copy of the archived document and store the document in its own file storage system or database. When requested to display the document the CRM system would retrieve it from its own database. If

you were to delete the original file from the archive folder the CRM system would still retain its own copy and you would still be able to access the document.

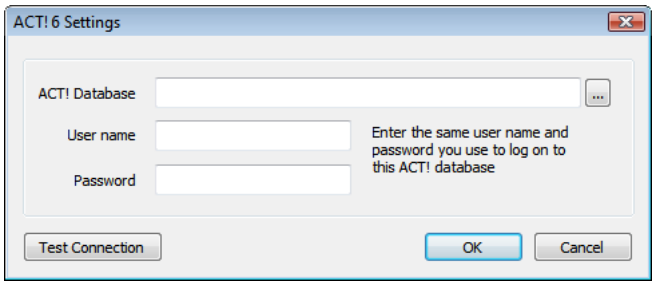
7.9.5.1 Sage Act! 6

Enables you to add notes and attach PDF documents to an Act! database.

Capabilities

- ☐ Store a PDF document from an archive against a contact
- ☑ Link a PDF document from an archive against a contact

Configuration



ACT! Database

Path to the ACT! database you want Spindle Document Distribution to connect to.

User name

The name of the ACT! user to use to logon to the database. This will also be the user name attached to any notes or documents created in the ACT! database.

Password

The password of the above user.

Test Connection

Enables you to test the user logon details are valid for the selected database.

Supported Versions

- Act! V6

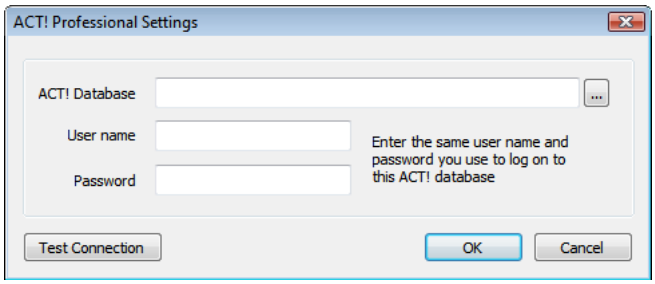
7.9.5.2 Sage Act! Professional

Enables you to add notes and attach PDF documents to an Act! Professional database.

Capabilities

- ☐ Store a PDF document from an archive against a contact
- ☑ Link a PDF document from an archive against a contact

Configuration



ACT! Database

Path to the ACT! database you want Spindle Document Distribution to connect to.

User name

The name of the ACT! user to use to logon to the database. This will also be the user name attached to any notes or documents created in the ACT! database.

Password

The password of the above user.

Test Connection

Enables you to test the user logon details are valid for the selected database.

Supported Versions

- Act! Professional V7 / V8
- Act! Professional for Workgroups V7 / V8
- Act! 2007 / 2008 / 2009
- Act! Premium for Workgroups 2007 / 2008 / 2009

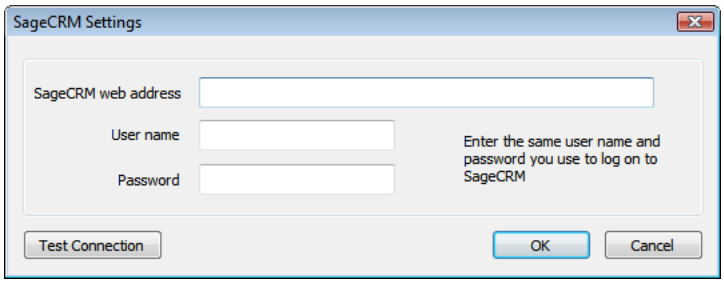
7.9.5.3 Sage 200 CRM

Enables you to add communications and attach PDF documents within the Sage 200 CRM application.

Capabilities

- ☑ Store a PDF document from an archive against a contact
- ☐ Link a PDF document from an archive against a contact

Configuration



SageCRM web address

URL web address of the Sage 200 CRM system you want Spindle Document Distribution to connect to.

User name

The name of the Sage 200 CRM user to use to logon to the database. This will also be the user name attached to any notes or documents created in the Sage 200 CRM database.

Password

The password of the above user.

Test Connection

Enables you to test the user logon details are valid for the selected database.

Supported Versions

- Sage 200 CRM

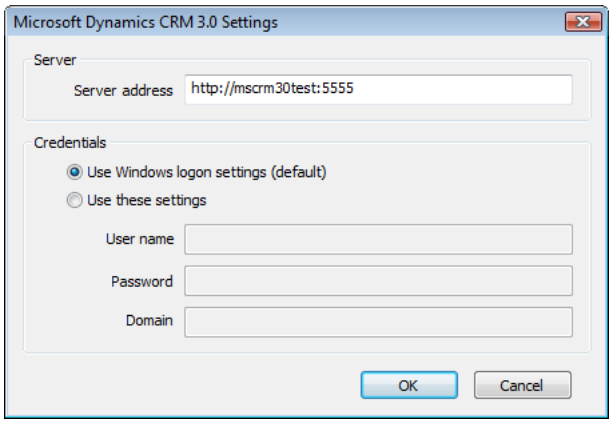
7.9.5.4 Microsoft Dynamics CRM 3.0

Enables you to add communications and attach PDF documents to the Microsoft Dynamics CRM 3.0.

Capabilities

- ☑ Store a PDF document from an archive against a contact
- ☐ Link a PDF document from an archive against a contact

Configuration



Server address

The web address of the server hosting the CRM service. You must be able to access this site successfully via a web browser. The format of the server address is typically "http://<crm_server_name>:<crm_server_port>". For example. http://mycrmserver:5454

Credentials

Spindle Document Distribution needs to logon to your CRM server. This is where you can select the logon credentials to use.

Use Windows logon settings (default)

Uses the Windows account settings of the user currently logged on to Windows. This is the default option and does not need any other information to be supplied.

Use these settings

If you need to logon to your CRM site as another user you will need to select this option. **Note:** You may not need to fill in these details if your site accepts your current Windows logon credentials.

User Name

The name of the user you want to use for authentication.

Password

The password of the above user.

Domain

The domain of the user.

Supported Versions

- Microsoft Dynamics CRM 3.0

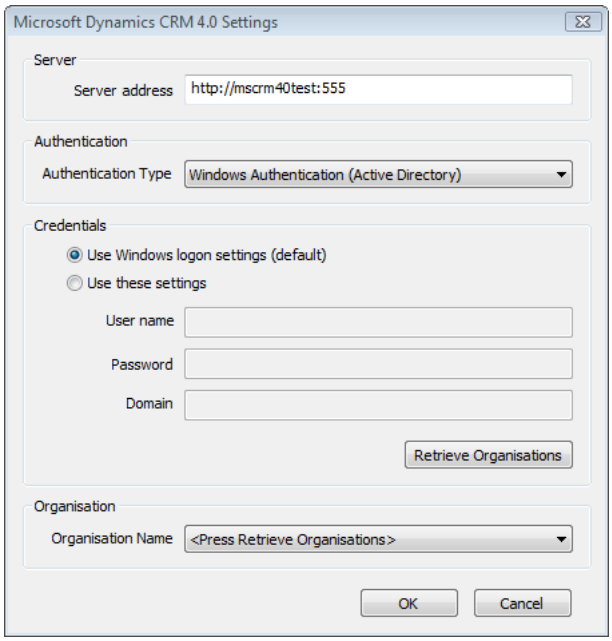
7.9.5.5 Microsoft Dynamics CRM 4.0

Enables you to add communications and attach PDF documents to the Microsoft Dynamics CRM 4.0.

Capabilities

- ☑ Store a PDF document from an archive against a contact
- ☐ Link a PDF document from an archive against a contact

Configuration



Server address

The web address of the server hosting the CRM service. You must be able to access this site successfully via a web browser. The format of the server address is typically "http://<crm_server_name>:<crm_server_port>". For example. http://mycrmserver:5454

Authentication Type

Selects the authentication scheme of the CRM server. The options are:

Windows Authentication (Active Directory)

Uses standard Windows user authentication. This scheme is used by intranet and local network based CRM servers.

Forms Authentication (Internet Facing)

Uses web page based authentication. This scheme is used when providing server access over the internet or a different network subnet.

Use Windows logon settings (default)

Uses the Windows account settings of the user currently logged on to Windows. This is the default option and does not need any other information to be supplied.

Use these settings

If you need to logon to your CRM site as another user you will need to select this option. **Note:** You may not need to fill in these details if your site accepts your current Windows logon credentials.

User Name

The name of the user you want to use for authentication.

Password

The password of the above user.

Domain

The domain of the user.

Retrieve Organisations

Click to retrieve the organisation list from the CRM server. The selections are stored within the Organisation Name drop-down list. The server address, authentication type & credentials are used to access the server.

Organisation Name

Select your required organisation from the list. Click the Retrieve Organisations button first to retrieve the organisation list from the CRM server.

Supported Versions

- Microsoft Dynamics CRM 4.0

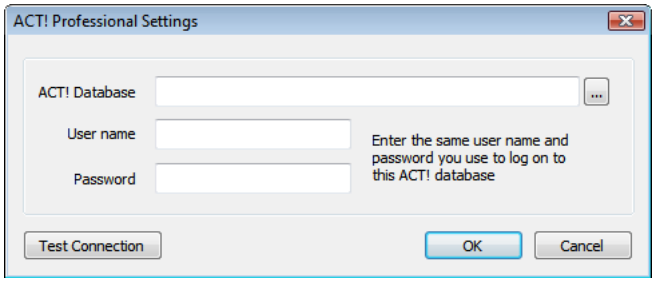
7.9.5.6 Sage ACT! Pro 2013

Enables you to add notes and attach PDF documents to an Act! Professional database.

Capabilities

- ☐ Store a PDF document from an archive against a contact
- ✔ Link a PDF document from an archive against a contact

Configuration



ACT! Database

Path to the ACT! database you want Spindle Document Distribution to connect to.

User name

The name of the ACT! user to use to logon to the database. This will also be the user name attached to any notes or documents created in the ACT! database.

Password

The password of the above user.

Test Connection

Enables you to test the user logon details are valid for the selected database.

Supported Versions

- Sage ACT! Prof 2013

7.10 User Settings

User Settings enable you to edit the current users preferences and configure the users default email, fax and CRM device. Spindle Document Distribution uses these settings when distributing documents. Each user of Spindle Document Distribution can use different default devices. For example one user could use the SMTP device for sending emails whilst another could use Outlook 2007, but both use the same Document Type and Document Operation.

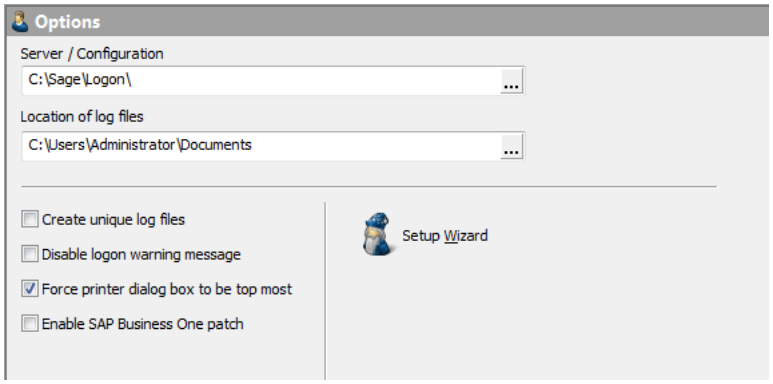
When a user logs on to a computer with Spindle Document Distribution installed for the first time, the User Setup Wizard launches. The details the wizard collects are stored in the user settings.

User Information

This section is used to identify the current user. This information can be used by Spindle Document Distribution to personalise emails by using commands such as ##SPUSERNAME## and ##SPUSEREMAIL##.

7.10.1 Options

The Options tab controls the location of the shared data along with several miscellaneous options.



User Settings Options

Server / Configuration

This is the location of the Spindle Document Distribution configuration files. If you are using Spindle Document Distribution in a multi-user environment then this folder is usually located on your network server. The location contains your forms, document automation rules and operations etc.

Location of log files

This is the location of the Spindle Document Distribution log files. The default location of the log files is in the My Documents directory of the current user.

Creative unique log files

Each time a user performs an action within Spindle Document Distribution a log file is either created or updated. The log files are replaced each time an action is repeated, for example if a user distributes a statement run followed by an invoice run only one processor log file will exist. Logs files can be quite large and therefore they are overwritten each time. However you can tick this option if you wish to keep all of the files and not overwrite them.

Disable logon warning message

As the user logs onto their workstation Spindle Document Distribution attempts to start the monitor program that enables Spindle Document Distribution to work. The monitor program will attempt to access the server immediately after the user logs on. However, sometimes network drives are not ready for the monitor to access them. If this occurs the user will get a warning message from Spindle Document Distribution which says that it could not connect to the server. Spindle Document Distribution will automatically try to connect by itself at a later point in time. Tick this option to disable the warning message.

Note: If this option is ticked then the user will not be alerted even if there is a genuine failure to connect to the server.

Force printer dialog box to be top most

When a user prints to Spindle Document Distribution printer driver a preview dialog box will appear asking them to confirm the document and settings are ok before distributing the document. However if between printing to the printer and the preview box appearing you have continued to work on your application, the preview box may be behind, or hidden from your screen's current window. Tick this option to force the printer dialog box to be on top of all other windows.

Enable SAP Business One patch

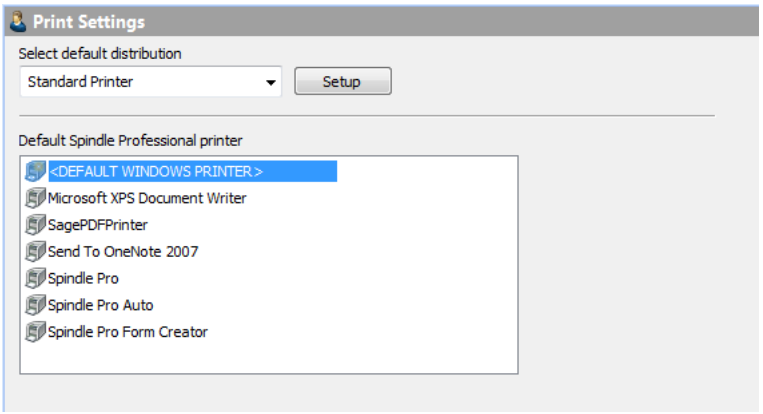
Tick this option to enable Spindle Document Distribution to work correctly with documents produced from SAP Business One.

Setup Wizard

Select this option if you wish to re-run the User Setup Wizard, which guides you through all of the User Settings in sequence.

7.10.2 Print Settings

Configures the printer settings for this user.



User Settings Print Settings

Select default distribution

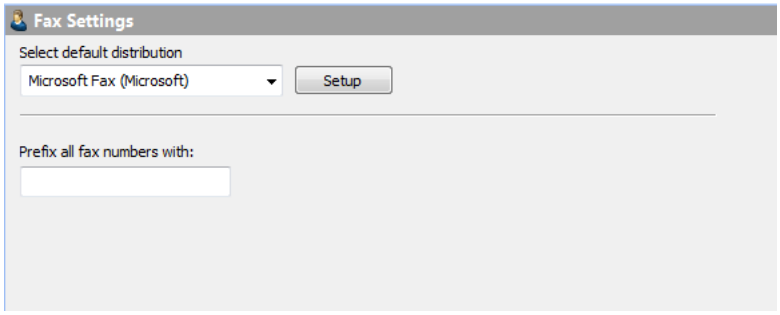
From the drop-down list you can select the default distribution device to use for this user when '---DEFAULT DEVICE---' is selected in a Document Operation (see page 61). **Note:** There is only one type of printer device available, the Standard Printer.

Default Spindle Document Distribution printer

Sets the printer driver to use for this user when the <DEFAULT SPINDLE PRINTER> is selected in a Document Operation.

7.10.3 Fax Settings

Configures the fax settings for this user. The fax software needs to be installed on the computer first and must be one of the fax solutions supported by Spindle Document Distribution.



User Settings Fax Settings

Select default distribution

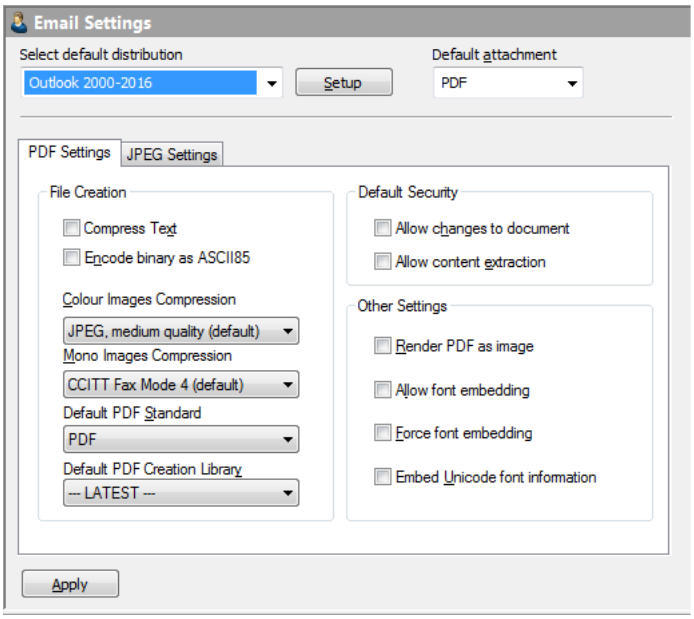
From the drop-down list you can select the default distribution device to use for this user when '---DEFAULT DEVICE---' is selected in a Document Operation (see page 61). You can configure the device by pressing the Setup button. The setup of each device may differ, please follow the on-screen instructions.

Prefix all fax numbers with:

Some telephone systems require a number to be dialled first to obtain an outside line, e.g. '9'. If your faxing software does not support the ability to select an outside line, you can enter the number here. This number will be prefixed to all fax numbers before they are passed to the faxing software.

7.10.4 Email Settings

Configures the email settings for this user. The email software needs to be installed on the computer first and must be one of the email solutions supported by Spindle Document Distribution.



User Settings Email Settings

Select default distribution

From the drop-down list you can select the default distribution device to use for this user when '---DEFAULT DEVICE---' is selected in a Document Operation (see page 61). You can configure the device by pressing the Setup button. The setup of each device may differ, please follow the on-screen instructions.

Default attachment

Selects the attachment type to generate when sending documents via email. Spindle Document Distribution can create email attachments as PDF files (the Adobe Portable Document Format) or as JPEG graphic files (Joint Photographic Experts Group). This attachment type can be overridden in the Document Operation.

PDF Settings Tab

The PDF settings tab allows you to alter the parameters for the creation of PDF files when emailing. By default Spindle Document Distribution has already selected the most reasonable settings to maximise quality yet still produce reasonable sized PDF files.

Compress Text

Tick to compress the text within the PDF file. This should result in a smaller file size.

Encode binary as ASCII85

Ticking this option will encode information in the ASCII format. This will result in a larger file size.

Colour Images Compression

Sets the compression rate for colour images within the PDF file. A higher compression rate will reduce the file size but will also result in lower image quality.

Mono Images Compression

Sets the compression rate for mono images within the PDF file.

PDF Standard

This sets the PDF standard to be used on the processed document that is produced by Spindle Document Distribution. There are three options that can be selected from the PDF Standard drop down. These options are;

PDF

Selecting this option means a normal PDF file will be created.

PDF/A-1b

Select this option to produce a PDF file that conforms to the PDF/A-1b standard. The PDF/A-1b standard is a level of PDF/A compliance, which is used for the long-term preservation of digital documents.

Since PDF/A-1b, in its essence, is related to long-term archiving, there are certain requirements and some functionality that is prevented from being applied to the file. For example, PDF passwords are not supported by the PDF/A-1b standard. Also fonts must be embedded into the PDF. As such, when selecting the PDF/A-1b option, the Allow content extraction, Allow changes to document, PDF Password fields and font fields are disabled.

Note: Only the PDF creation library v4.0.207 and later versions support the PDF/A-1b standard. If you attempt to select the PDF/A-1b option with an incompatible library version, you will be warned and advised to change the PDF Creation library to one that is supported.

Default PDF Creation Library

Spindle Document Distribution is used with a vast variety of documents and there have been occasions where documents have not rendered consistently between versions of the PDF library. The PDF Creation Library choice allows us to move forward by default, to the latest version of the library and provide for alternative PDF rendering to be established for any problematic document type.

Note: Please be aware that the v4 PDF libraries offer a higher degree of PDF document protection as they use AES-256 encryption. The v3 PDF libraries use 40-bit RC4 encryption, which is not as up-to-date.

Allow changes to the document

Tick this option to allow the recipient of the PDF file to change the contents of the document.

Allow content extraction

Tick this option to allow the recipient to copy and paste the contents of the PDF file into another package, for example Microsoft Word.

Render PDF as image

The documents printed to Spindle Document Distribution are converted into Adobe PDF files and contain complex shading, company branding, images and text. Sometimes not all of these elements can be converted correctly into a format that the PDF understands. This can result in a PDF file that contains invalid text items, corrupted images or some other undesired result. Ticking this option attempts to convert the document correctly by creating each document page as an image. However, the quality of the file is decresed, the file size is increased and the text within the PDF file is not searchable. This option should only be enabled if directed to do so by an authorised Draycir Partner.

Allow font embedding

Font embedding enables Spindle Document Distribution to store the fonts used within the PDF file itself. This enables the person viewing the PDF file to see the text in the original fonts even if that font is not installed on their computer. Embedding fonts within the PDF file will increase its file size. Within each font there is a copyright flag which authorises the distributing of that font. This option will only embed fonts that are authorised for distribution.

Force font embedding

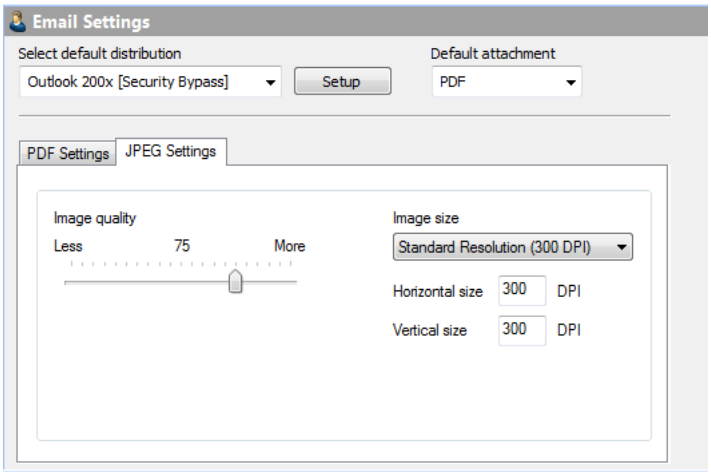
This option works in conjunction with Allow font embedding. Normally, only fonts that are authorised for distribution are embedded into PDF files created by Spindle Document Distribution. However, this option overrides this setting and forces the font to be embedded in to the PDF file. You will need to get permission from the owner of the font you want to embed before you enable this option. **Note: if you enable this setting without obtaining the font owners permission you may be breaking copyright law.**

Embed Unicode font information

Unicode is a technical specification of the amount of space that is required to store a character in any of the world's languages. Tick this option if the PDF file needs to support larger character sets.

7.10.4.1 JPEG Settings Tab

The JPEG settings tab allows you to alter the parameters for the creation of JPEG files when emailing. By default Spindle Document Distribution has already selected the most reasonable settings to maximise quality yet still produce reasonable sized files.



User Settings Email Settings JPEG Tab

Image quality

This option allows you to set the quality of the JPEG image that is created. The higher the image quality the greater the file size.

Image size

Contains pre-defined DPI (Dots Per Inch) selections for the image size. Adjust this setting to create higher or lower resolution images. Higher resolution images will increase the size of the created file.

Horizontal size

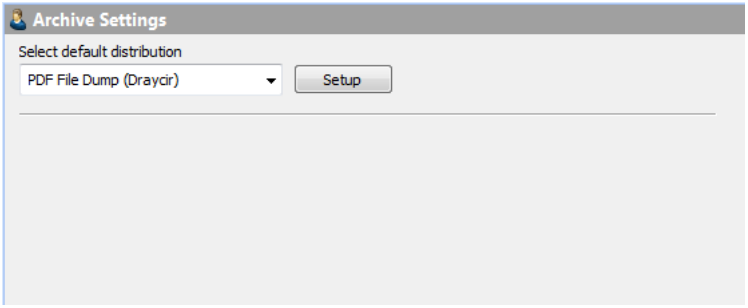
The horizontal size of the image to create in DPI. The value is set depending on the item selected in Image size. However you can override this setting by entering a value directly.

Vertical size

The vertical size of the image to create in DPI. The value is set depending on the item selected in Image size. However you can override this setting by entering a value directly.

7.10.5 Archive Settings

Configures the archive settings for this user.



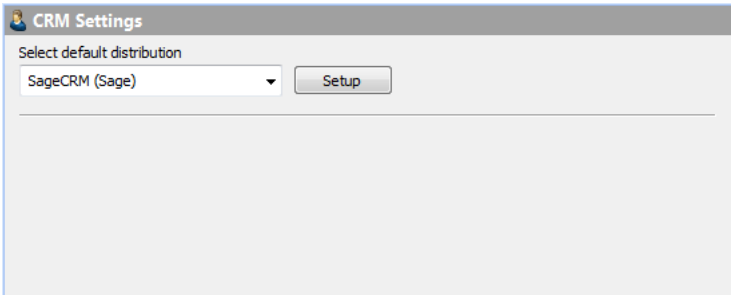
User Settings Archive Settings

Select default distribution

From the drop-down list you can select the default distribution device to use for this user when '---DEFAULT DEVICE---' is selected in a Document Operation (see page 61). You can configure the device by pressing the Setup button. The setup of each device may differ, please follow the on-screen instructions.

7.10.6 CRM Settings

Configures the CRM settings for this user.



User Settings CRM Settings

Select default distribution

From the drop-down list you can select the default distribution device to use for this user when '---DEFAULT DEVICE---' is selected in a Document Operation (see page 61). You can configure the device by pressing the Setup button. The setup of each device may differ, please follow the on-screen instructions.

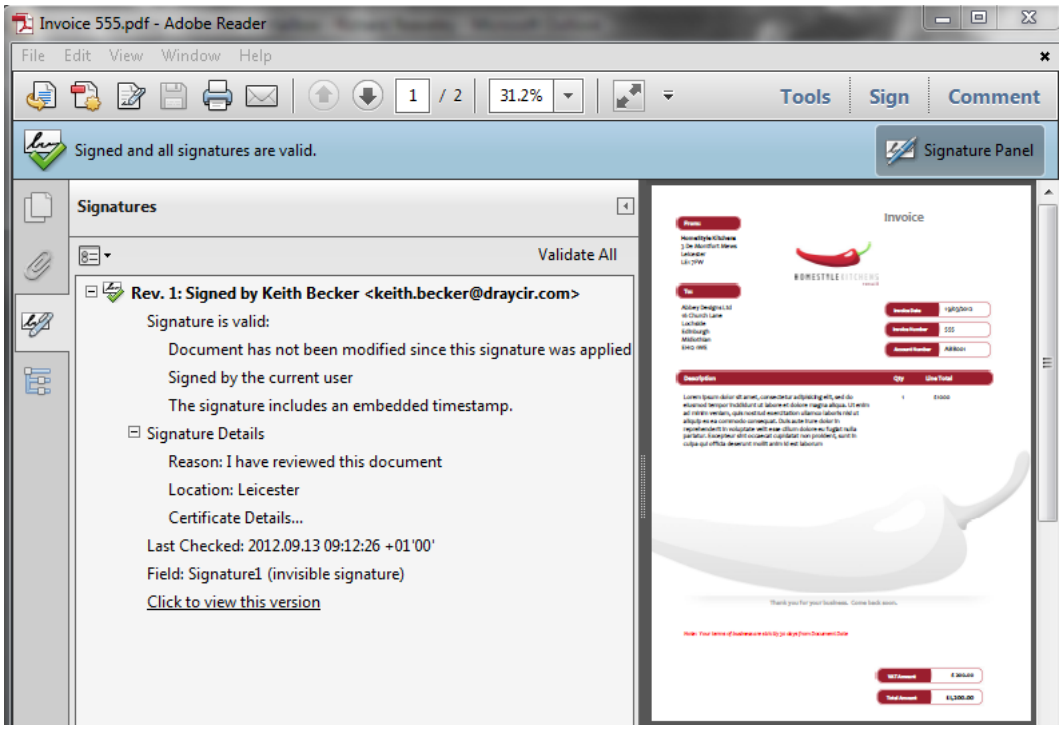
7.10.7 Digital Signature Settings

The Digital Signature capability within Spindle Document Distribution has been designed to provide Certified Document Services (CDS) through an Adobe CDS provider's certificate which guarantees to the recipient of the signed PDF, that the author's identity has been verified by a trusted organisation.

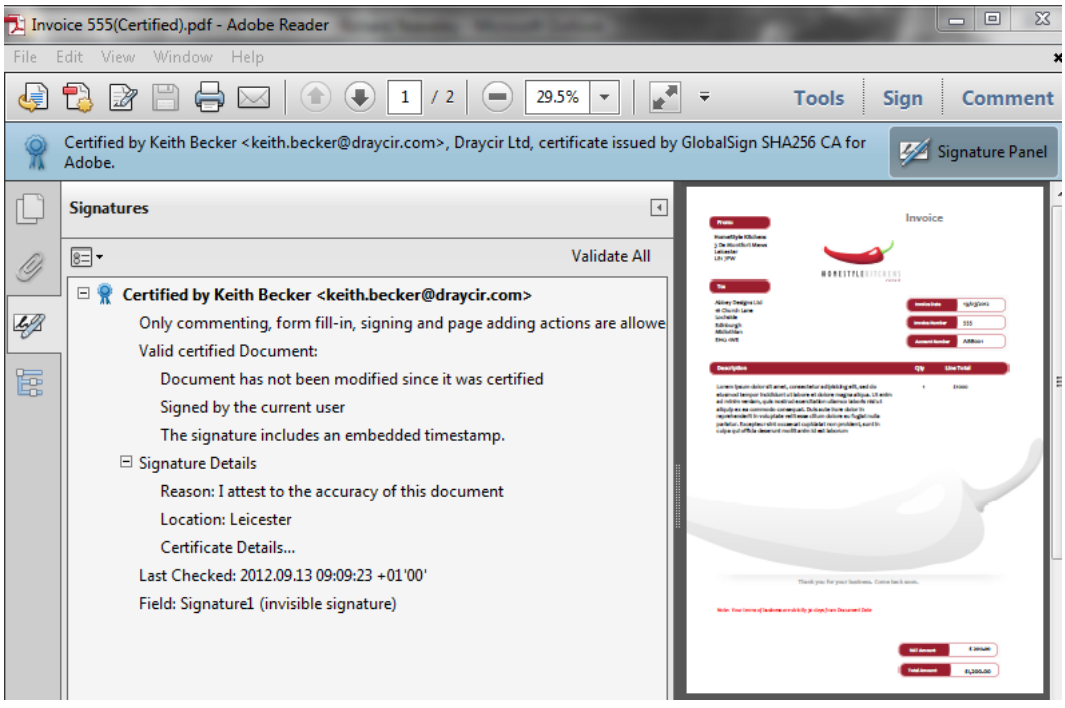
The two types of signatures available within Adobe CDS are Approval and Certification.

1. The Approval or "Green Tick" signature, is tied to the contents of the document at the point of signing. Any subsequent changes to the document invalidates the signature and would be highlight in compliant Adobe PDF reading applications. A document may have multiple Approval signatures and document content can be rolled back to verify "as was" at the time of any signature. This type of signature guarantees a secure audit trail in support of a variety of work flows.
2. The Certification or "Blue Rosette" signature, provides the option for either a total lock or controlled additions to the PDF. When signing with Spindle Document Distribution the additions are restricted to annotations and Approval signatures. Only the first person to sign the document can provide a Certification signature.

Either of the CDS compliant signatures guarantee the document content at the time of signing. The trusted status of the PDF is displayed in Adobe PDF reading applications in an information panel and also by either a blue ribbon or a green tick, in the Signature Panel at the top of the screen. Example CDS compliant Approval and Certification signatures are shown below.

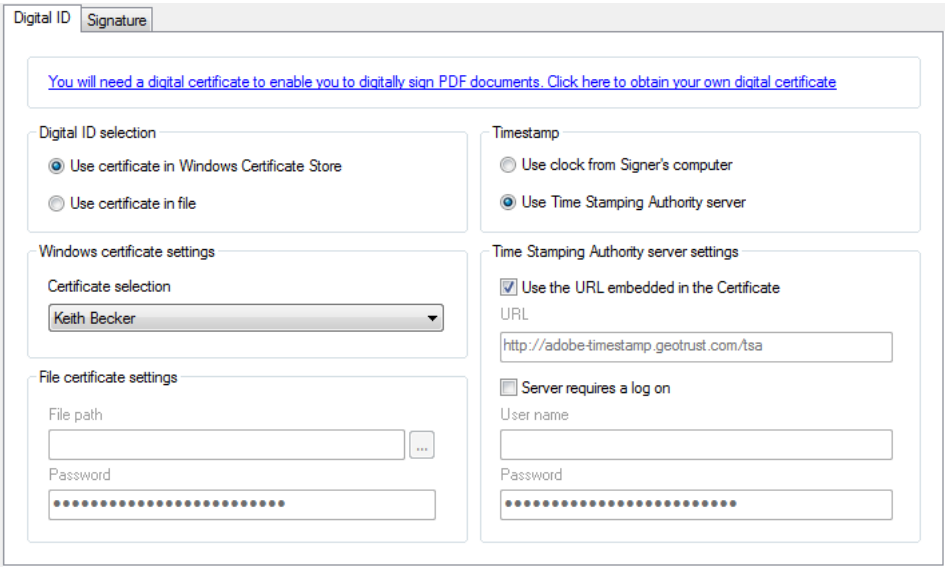


Approval Signature



Certification Signature

Configuring your signature



User Settings Digital ID tab.

Use certificate in Windows Store.

Enables the Windows certificate settings area. In order to be CDS compliant, the certificate of identity must be held in an approved secure manner. For smaller installations the device typically used is a USB token device. The USB token device must be plugged directly into the user's machine when they enter the Spindle Tools program for configuration purposes and while the processor is executing to generate a signed PDF. With the certificate installed to the token device and the device plugged in to the user's machine, the certificate is available for selection from the Windows Certificate Store.

Use certificate in File

Enables file certificate settings area.

Windows certificate settings

The Certificate selection control allows selection from the certificates contained in the Windows Certificate Store.

File certificate settings

Non Adobe CDS compliant certificates may be delivered from a file and these controls allow the file's path and an access password to be specified.

Timestamp

The timestamp is used to record the time of signing and where using a recognised Time Stamping Authority, proves the existence of the document in the signed state, at a specific point in time.

Time Stamp Authority Server settings

A Time Stamping Authority is a trusted service that confirms the current date and time. By default the time stamp server settings imbedded within the certificate are used, however options are provided here to log on to your choice of Time Stamping Authority server.

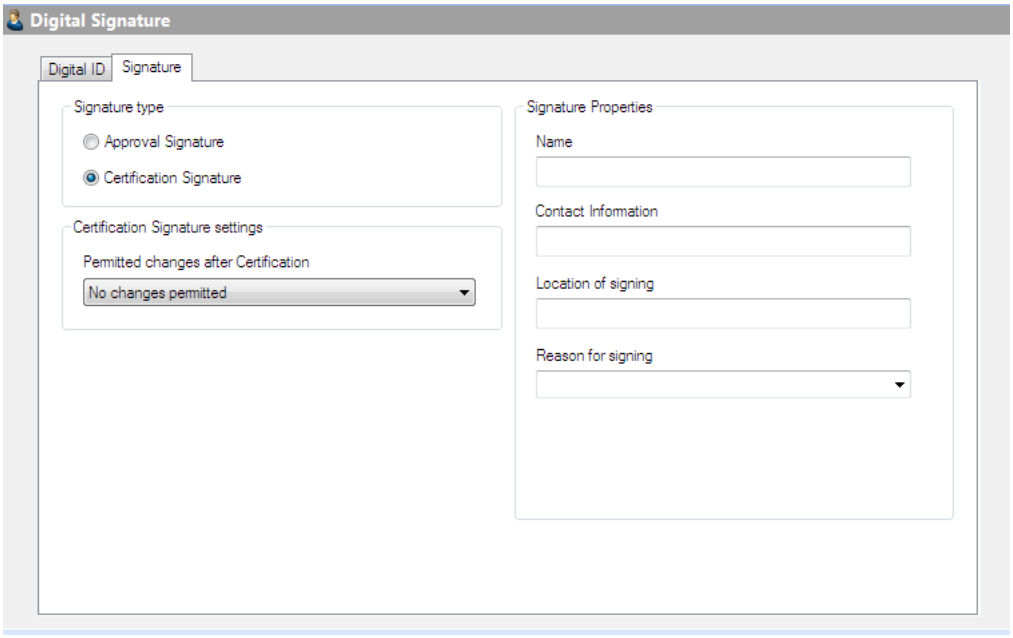
Use the URL embedded in the certificate

Check this option to use the time stamp mechanism contained within the certificate, to confirm the data and time of signing.

Server requires a logon

Used to indicate that the user's authentication details are to be presented to the Time Stamping Authority server.

Signature Settings



Digital Signature tab

Signature type

The two types of signatures available within CDS are Approval and Certification signatures.

- The Approval Green Tick signature, is tied to the contents of the document at the point of signing. Any subsequent changes to the document invalidates the signature and would be highlighted in compliant Adobe PDF reading applications. A document may have multiple Approval signatures and document content can be rolled back to verify "as was" at the time of any Approval signature. This type of signature guarantees a secure audit trail in support of a variety of work flows.
- The Certification Blue Rosette signature provides the option for either a total lock or controlled additions to the PDF. When signing with Spindle Document Distribution the additions are restricted to annotations and Approval signatures. Only the first person to sign the document can provide a Certification signature.

Certification signature settings

Permitted changes after Certification are:

- No changes permitted;
- Allow Approval signatures;
- Allow annotations and Approval signatures.

Signature Properties

These properties are optional default values for all types of signatures and appear in the certificate's information panel within Adobe Reader.

Name of the signatory

Enter the name of the Spindle Document Distribution user. **Note:** This field does not overwrite the name directly associated with the certificate when it was first installed.

Contact information

Enter the contact details to be displayed within the digital signature.

Location of signing

Enter the location of signing to be displayed within the digital signature.

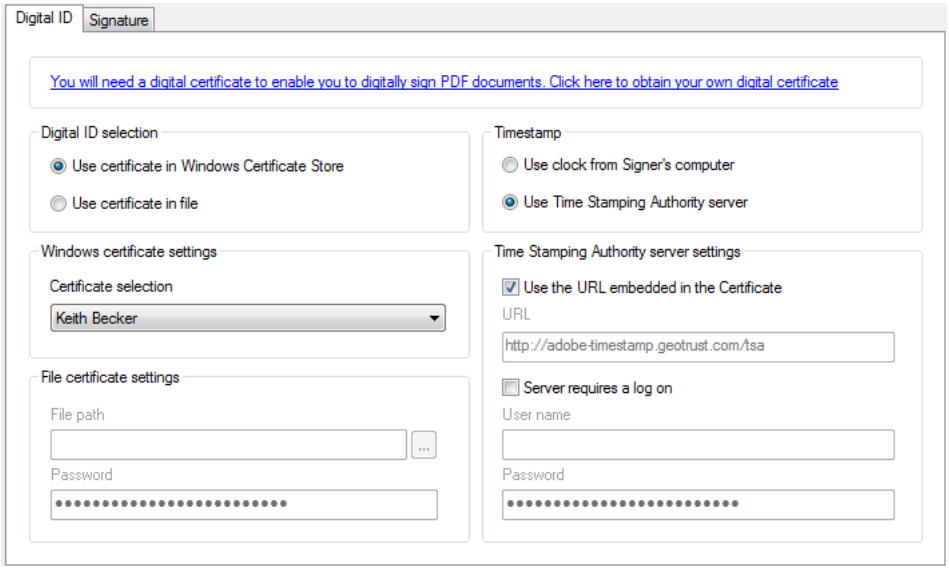
Reason for signing

Choose one from the following:

- I am the author of this document;
- I have reviewed this document;
- I have approved this document;
- I attest to the accuracy of this document.
- You can enter into the text box your own alternative reason for signing.

7.10.7.1 Digital ID

Use this tab to establish the user's default digital signature type and associated options, to use within Spindle Document Distribution document e-mail and archive automations.



User Settings Digital ID Tab

Use certificate in Windows Store.

Enables the Windows certificate settings area. In order to be CDS compliant, the certificate of identity must be held in an approved secure manner. For smaller installations the device typically used is a USB token device. The USB token device must be plugged directly into the user's machine when they enter the Spindle Tools program for configuration purposes and while the processor is executing to generate a signed PDF. With the certificate installed to the token device and the device plugged in to the user's machine, the certificate is available for selection in the Windows Certificate Store.

Use certificate in File

Enables file certificate settings area.

Windows certificate settings

The Certificate selection allows selection from the certificates contained in the Windows Certificate Store.

File certificate settings

Non Adobe CDS compliant certificates may be delivered from a file and these controls allow the file's path and an access

password to be specified.

Timestamp

The timestamp is used to record the time of signing and where using a recognised Time Stamping Authority, proves the existence of the document in the signed state, at a specific point in time.

Time Stamp Authority Server settings

A Time Stamping Authority is a trusted service that confirms the current date and time. By default the time stamp server settings imbedded within the certificate are used, however options are provided here to log on to your choice of Time Stamping Authority server.

Use the URL embedded in the certificate

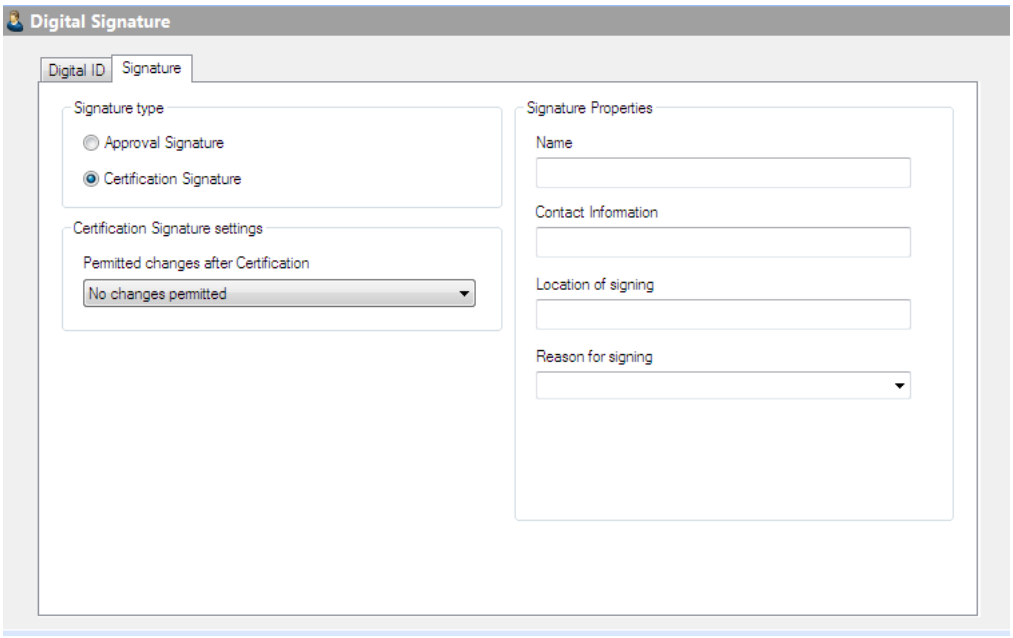
Check this option to use the time stamp mechanism contained within the certificate, to confirm the data and time of signing.

Server requires a logon

Used to indicate that the user's authentication details are to be presented to the Time Stamping Authority server.

7.10.7.2 Digital Signature

Signature Settings



Digital Signature tab

Signature type

The two types of signature available within CDS are Approval and Certification signatures.

- The Approval Green Tick signature, is tied to the contents of the document at the point of signing. Any subsequent changes to the document invalidates the signature and would be highlighted in compliant Adobe PDF reading applications. A document may have multiple Approval signatures and document content can be rolled back to verify "as was" at the time of any Approval signature. This type of signature guarantees a secure audit trail in support of a variety of work flows.
- The Certification Blue Rosette signature provides the option for either a total lock or controlled additions to the PDF. When signing with Spindle Document Distribution the additions are restricted to annotations and Approval signatures. Only the first person to sign the document can provide a Certification signature.

Certification signature settings

Permitted changes after Certification are:

- No changes permitted;
- Allow Approval signatures;
- Allow annotations and Approval signatures.

Signature Properties

These properties are optional default values for all types of signing that appear in the certificate's information panel within Adobe Reader.

Name of the signatory

Enter the name of the Spindle Document Distribution user. **Note:** This field does not overwrite the name directly associated with the certificate when it was first installed.

Contact information

Enter the contact details to be displayed within the digital signature.

Location of signing

Enter the location of signing to be displayed within the digital signature.

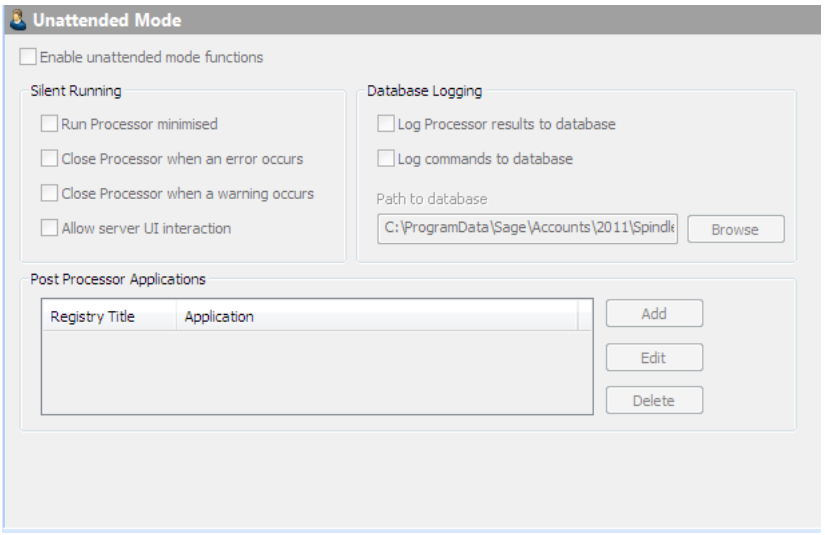
Reason for signing

Choose one from the following:

- I am the author of this document;
- I have reviewed this document;
- I have approved this document;
- I attest to the accuracy of this document.
- You can enter into the text box your own alternative reason for signing.

7.10.8 Unattended Mode

The Unattended Mode section contains a number of options targeted at providing flexibility in the way Spindle Document Distribution can be configured on a server.



Unattended mode dialog

Enable unattended mode functions

If the prerequisite licence has been purchased the user can select the "Enable unattended functions" option to enable the "Silent Running", "Database Logging" and "Post Processor Applications" options.

Silent Running

This group of options are provided to inhibit the need for user interaction with Spindle Document Distribution so that it can be run unattended.

Run Processor minimised

It is often not desirable to see a user interface for applications running on a server.

Close processor when an error or warning occurs

If Spindle Document Distribution errors a dialog box would normally be presented, which effectively stops Spindle Document Distribution from continuing until the user clicks ok. The two "Close Processor..." options suppress the error and warning dialogs, allowing Spindle Document Distribution to continue to the next job.

Allow server UI interaction

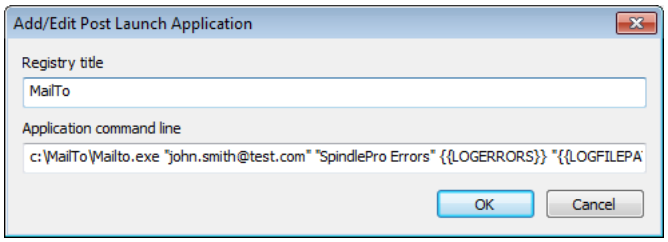
If unchecked (default value) and a print job is sent to the non-auto printer or no valid document automation type is found, the processor will exit. If checked then the processor will display the Spindle dialog that allows manual selection of the document automation parameters.

Database Logging

The option to record the jobs and even details of the automations undertaken to a database, are particularly beneficial when serving multiple users and running unattended. The fact that information is recorded to a database provides the option to generate reports on the system's usage. **Note:** Such reports are not currently provided within Spindle Document Distribution.

Post Processor Applications

In order to continue smooth operation of the system when running unattended, it may still be necessary sometimes to take action. Spindle Document Distribution will at the end of each job, execute and pass status parameters to the applications registered here. An example of such an application would be one which in the event of an error, sends an e-mail notification to a system administrator, with details from the error log.



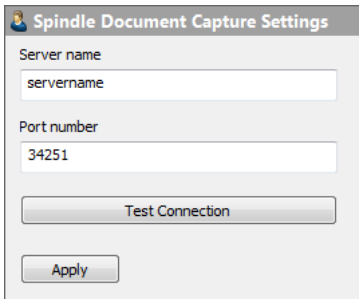
The available parameters are :

- {{LOGFILEPATH}} – Path and filename of the log file
- {{LOGFILENAME}} – Just the filename of the log file
- {{LOGERRORS}} – The number of errors (LERR) logged
- {{LOGWARNINGS}} – The number of warnings (LWARN) logged
- {{PSTITLE}} – Short title of the product (Spindle Document Distribution)
- {{PLTITLE}} – Long title of the product (Spindle Document Distribution)
- {{PSCOMPANY}} – Short title of our company (Draycir)
- {{PLCOMPANY}} – Long title of our company (Draycir Ltd)
- {{PSVERSION}} – Version of the product as taken from the registry

7.10.9 Spindle Document Capture Settings

Specify the connection details to your Spindle Document Capture server.

Note: These are global settings and will apply to both the Spindle Document Capture Archive (see page 116) device and the SDCATTACH (see page 217) command.



User Settings Spindle Document Capture Settings

Server name

Specify the server name (or IP address) of your Spindle Document Capture server.

Port number

Specify the port number that your Spindle Document Capture service is listening on.

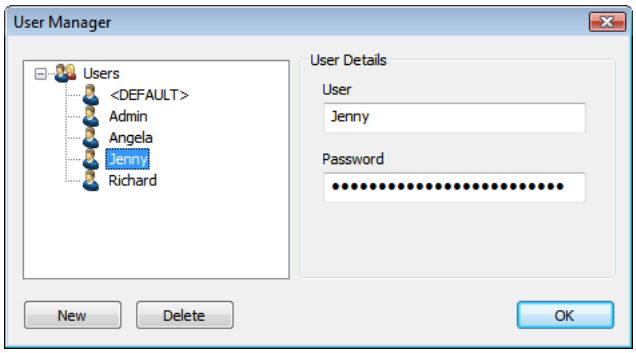
Test Connection

Click on Test Connection to test that the Spindle Document Capture service is reachable on the server and port you have specified.

7.11 User Manager

The User Manager allows you to control and grant access to Spindle Document Distribution Tools. When Spindle Document Distribution is first installed only one user exists in the user manager; Admin. The default password for the Admin is blank.

Note: These settings are only required if you want to limit access to Spindle Document Distribution Tools. They are not required to access other parts of Spindle Document Distribution, they do not use licences and they have nothing to do with accounting users.



User Manager dialog

7.11.1 Creating new users

To create a new user manager user:

1. Launch Spindle Document Distribution Tools.
2. From the **Tools** menu select **User Manager**.
3. In the **User Manager** dialog box click **New**.
4. A new entry will appear in the tree window called **New User**. Rename the entry.
5. In **Password** enter the password associated to this user.
6. Click **OK**.

7.11.2 Deleting users

To delete a user manager user:

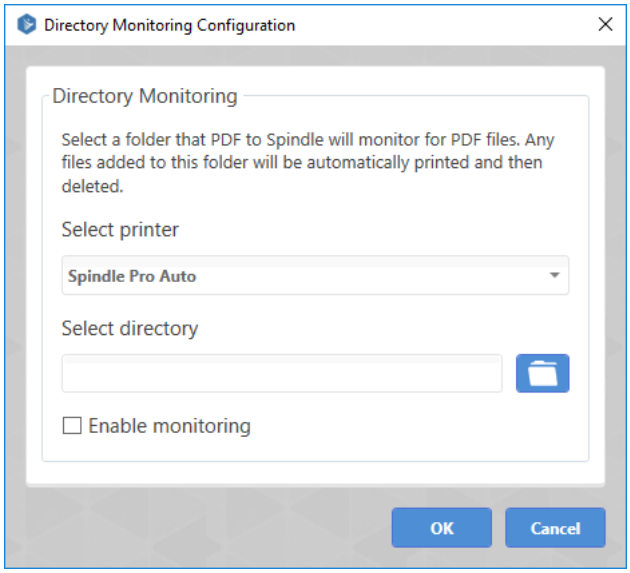
1. Launch Spindle Document Distribution Tools.
2. From the **Tools** menu select **User Manager**.
3. In the **User Manager** dialog box select the user you want to delete.
4. Click **Delete**.
5. A dialog box will appear asking you to confirm that you want to delete the user. Click **Yes**.
6. Click **OK**.

7.12 PDF to Spindle

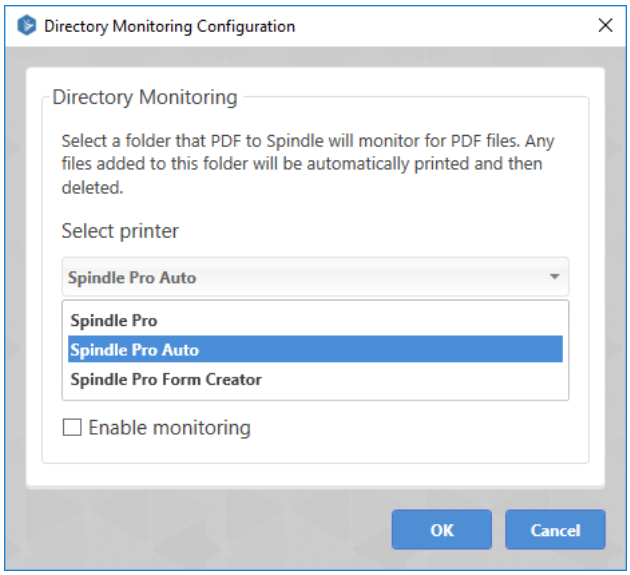
PDF to Spindle is a feature that allows users to process PDF files in Spindle Document Distribution and retain the file's integrity including ## commands. Users can select single files and print them or use the monitored directory function. This function allows users to nominate a folder that the system monitors continuously, when PDF files are added to this folder they are picked up and processed automatically. The monitoring service will only pick up PDF files or PDF files directly within a zipped folder.

The feature has it's own UI and to use the monitored directory you must configure it first.

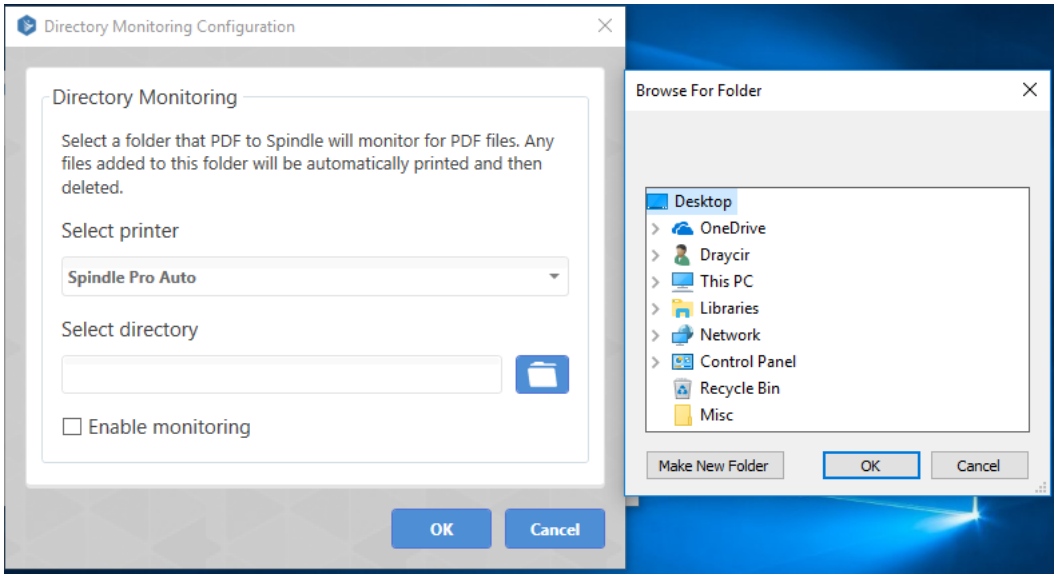
What the UI looks like when a user first accesses it:



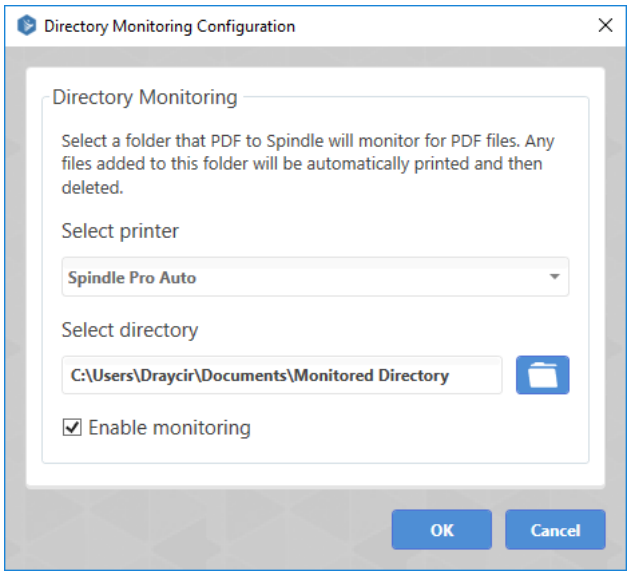
Click on the drop down box to select the printer:



Select a folder to be monitored by clicking on the blue folder icon:



Once a user has selected the printer to use and the folder that will be monitored the "Enable monitoring" box will be checked, then once the user clicks the "OK" button, the monitoring service will start:



At this point any PDF files added to the folder will be processed.

8 How Do I?

8.1 Send one document to multiple printers

Problem

You want to print the same document to multiple places at the same time. The printers can be where you want but they need to appear in your Windows printer list.

Solution

To do this you need to create ‘Multiple operations’ within your ‘Document Type’ rule, one operation per printer is required. So if you want to print your document to 3 different printers you will need to create 3 ‘Operations’.

Load Spindle Document Distribution tools, select ‘Document Automation’, right click on your ‘Document Type’ and select ‘New Operation’. Fill in an Operation name and fill in the ‘Subject’ field, click on the ‘Distribution’ tab and select 1st as ‘Print’. Print Settings then appears under your new Operation, simply select the printer you want your document to be printed to. Repeat the steps for every printer you want to print to.

8.2 Email the sales rep when distributing an invoice

There are three different ways to achieve this and the method depends on how many sales people you have.

For one sales person

Here we assume you have a document rule that is already setup and you wish to add the sales persons copy. Simply follow the steps below.

Load Spindle Document Distribution tools, select ‘Document Automation’, right click on your ‘Document Type’ and select ‘New Operation’. Fill in an Operation name and fill in the ‘Subject’ field, click on the ‘Distribution’ tab and select 1st as ‘Email’. The Email Settings list item then appears under your new Operation, click on Email Settings. Enter the message you want in the email to your sales person, then on the ‘Details’ tab click on ‘Send email to these recipients’. Click the ‘Add’ button and fill in their name and enter their email address.

Now every time you print an invoice a copy will be sent to your sales person.

For a few sales people

Using this method we create an Operation for each sales person and use ‘Criteria’ to ensure only the right sales person gets the email. However you do need some method of telling Spindle Document Distribution which sales person each invoice is for. Normally this is done by using an analysis code or some other value on a sales account or the invoice itself. This depends on your accounting system.

Here we assume you have a document rule that is already setup and you wish to add the sales persons copy. Simply follow the steps below.

Load Spindle Document Distribution tools, select ‘Document Automation’, right click on your ‘Document Type’ and select ‘New Operation’. Fill in an Operation name and click on the ‘Criteria’ button at the top.

Tick ‘Enable criteria’, and then select the ## command that identifies the sales person. This ensures that only invoices that

match this criteria will be sent to this sales person. Click ‘Ok’. Now fill in the ‘Subject’ field, click on the ‘Distribution’ tab and select 1st as ‘Email’. The Email Settings list item then appears under your new Operation, click on Email Settings. Enter the message you want in the email to the sales person, then on the ‘Details’ tab click on ‘Send email to these recipients’. Click the ‘Add’ button and fill in their name and enter their email address.

Now repeat the above steps for each sales person changing the criteria each time and changing the email address. To do this quickly, use the ‘Copy Operation’ feature, right click on your operation and select ‘Copy Operation’.

For many sales people

If you have a larger number of sales people it is not efficient to create a different operation for each sales person. This way uses ‘External Data’ to gather email addresses from a database. We are assuming that you want to distribute your invoices via email to your customers; this should be the first operation. Use ‘External Data’ with ‘Data Sources’ and ‘Data Links’ to override the customers email addresses with the sales person’s email address. For this you may need to create a simple database using something like Microsoft Access just so Spindle Document Distribution can look up the sales persons email address unless your accounting system supports email addresses for sales people.(See the Data Links (see page 133) section of the help file for more information.)

Load Spindle Document Distribution tools, select ‘Document Automation’, right click on your ‘Document Type’ and select ‘New Operation’. Fill in an Operation name and fill in the ‘Subject’ field, click on the ‘Distribution’ tab and select 1st as ‘Email’, select ‘Data Links’ and add the data links you’ve previously created. Under Email Settings enter the message you want to tell your sales people when they receive the emails.

8.3 Attach a document to an account in my CRM system

Problem

You are already archiving your documents and now you want to link them into your CRM system at the same time. **Note:** You can’t link previously archived documents, only documents processed in the future will be linked to your CRM system.

Solution

Load the Spindle Document Distribution tools, select the ‘Document Automation’, select your document type and click on the plus symbol, select your Operation, select the ‘Distribution’ tab and tick ‘Enable CRM module’, ‘CRM Settings’ then appears under your operation. Select ‘CRM Settings’ and then pick ‘Attachment’ under Update Type. Now select the archive manager you have used against the operation, if you are not sure select ‘Archive Settings’ and check the archive manager you are using. **Note:** You must archive on the same operation as you are linking to your CRM. Under message add the text you want to see in the CRM system. Remember you can use ## commands to inform the CRM user about the document you have attached. **Note:** The CRM linkage relies on the matching of ##COMPANY and ##NAME on your document with a company and a contact within the CRM system.

8.4 Email my customer and print an internal copy of a document at the same time

Problem

To do this you need to create ‘Multiple operations’ within your ‘Document Type’ rule, one operation will process the document using your settings for emailing and the second operation using your settings for printing.

Solution

Here we assume you have a document rule that already does the emailing to your customer. To add the printing of an internal copy follow the steps below.

Load Spindle Document Distribution tools, select ‘Document Automation’, right click on your ‘Document Type’ and select ‘New Operation’. Fill in an Operation name and fill in the ‘Subject’ field, click on the ‘Distribution’ tab and select 1st as ‘Print’. The list item Print Settings will then appear under your new Operation, simply select the printer you want your document to be printed to.

8.5 Print my terms and conditions on the back of a page

Problem

To do this you firstly need a printer that can do duplex printing.

Solution

Load Spindle Document Distribution tools, select the ‘Document Automation’, select your document type and click on the plus symbol, select your Operation, click on the plus symbol, click on ‘Print Settings’, click ‘Enable Duplex’ , select the ‘Forms Tab’ and select the copy you want to add your Terms and Conditions form to. Click on the ‘Duplex’ button and then click ‘Add’ and select the form that is your Terms and Conditions form.

Note: Forms used for Duplex can only be one page and not a multi-page form. With multi-page forms only the first page will be printed.

8.6 Add a Spindle Document Capture barcode on my document

As part of the Spindle Document Capture integration, you are able to add a ##SDCBARCODE## command onto your documents. This will then add a special barcode onto your document when printed through Spindle Document Distribution. This barcode will be registered with Spindle Document Capture meaning the physical document can then be scanned into Spindle Document Capture to be archived and associated within your host system.

Example:

- Print a Despatch Note to Spindle Document Distribution
- The document has an SDC barcode and is sent to the warehouse printer
- The warehouse sends the Despatch Note with the delivery driver to deliver the goods
- The recipient of the goods signs the Despatch Note to confirm receipt
- The driver returns the signed Despatch Note
- The signed Despatch Note is scanned directly into Spindle Document Capture
- The barcode is recognised and the user is able to auto-archive and link the document to the host system at a click of a button

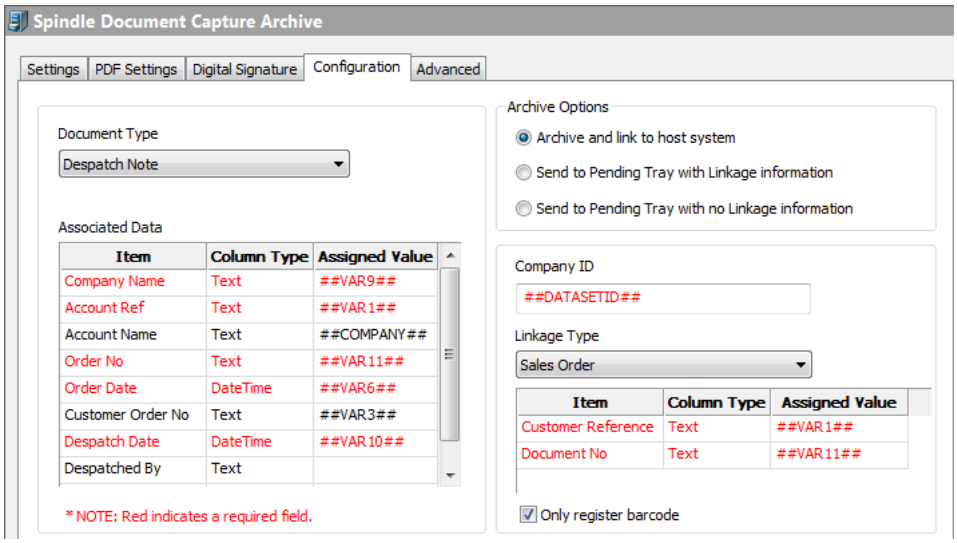
You will need to follow a few steps in order to achieve this as described below.

1. **Setup a Spindle Document Capture Archive**

The barcode that you place on your document will need to be registered with Spindle Document Capture so that when your

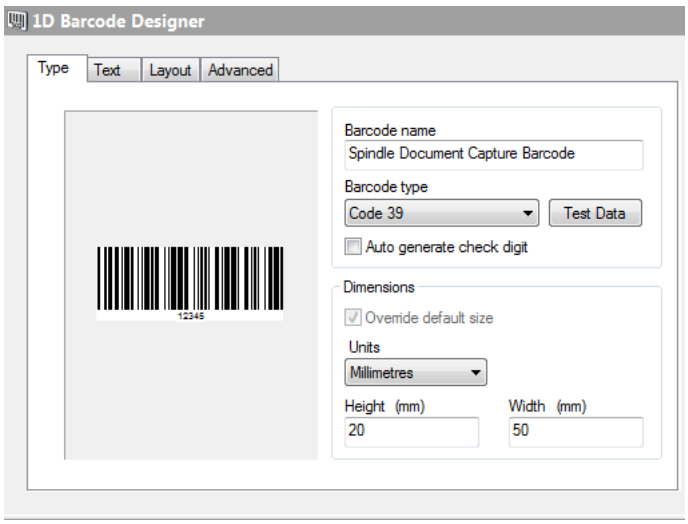
physical document is scanned back into Spindle Document Capture, Spindle Document Capture knows how it should be archived and has the correct linkage information to be able to associate it with the correct entity in your host system. Spindle Document Capture will therefore need to know the Document Type that the scanned document needs to be archived as, and requires all of the mandatory associated data items and linkage information items to also be supplied. See Data Configuration Tab (see page 121) for more information.

Note: If you do not want to archive the actual document that you print to Spindle Document Distribution, but only want to register the barcode in Spindle Document Capture, please tick 'Only register barcode'. An example would be when printing Delivery Notes. You may not want to archive the unsigned copy, but may only want to register the barcode with Spindle Document Capture so that when the signed copy is returned, you can scan this in and the barcode is recognised.



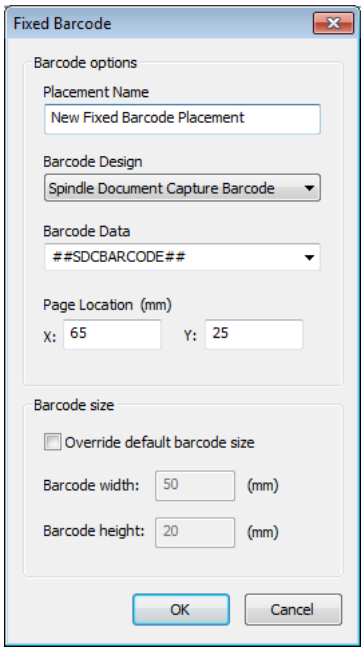
2. **Add a new Spindle Document Capture barcode design**

In Barcode Designer, add a new Code 39 barcode as specified in Creating barcodes (see page 136).



3. **Add a Fixed Barcode or Listing Barcode on your Operation**

On the appropriate Operation (under your Document Automation) add either a fixed or listing barcode. You must choose the Barcode Design you added in Step 2 above. On the Barcode Data drop down you must select ##SDCBARCODE##.



4. **Enable your Spindle Document Capture archiving module on your Operation or add a new Spindle Document Capture archive operation**

You must either:

- add your Spindle Document Capture archive module under the same operation that your SDC barcode resides on
- or Add a new Spindle Document Capture Archive Operation

(See Step 1 above for more information on setting up a Spindle Document Capture archive.)

Note:

- if you add a separate Archive Operation, if it is the first operation in the list, it must have the SDC barcode added on the Barcodes tab
- if you have multiple operations that require barcodes, they must all have the same split variable. If the operations are split on different variables, the barcodes will not be registered correctly in Spindle Document Capture.

5. **Place the ##SDCBARCODE command onto the report layout**

You must add a ##SDCBARCODE## variable onto the report layout that you are processing.

8.7 Use the Direct Print functionality

The Direct Print functionality is used to send one-off distributions of a document on-the-fly without going through a Document Automation.

To use this functionality and for the Direct Print dialog to appear, you can do one of the following;

- Print to the Spindle Pro printer driver
- Print a document to the Spindle Pro or Spindle Pro Auto printer driver and you do not have a matching ##CFG command on your report
- Print to the Spindle Pro printer driver, have a matching ##CFG command but change the Document Type Configuration from <AUTOMATION> to <NONE>

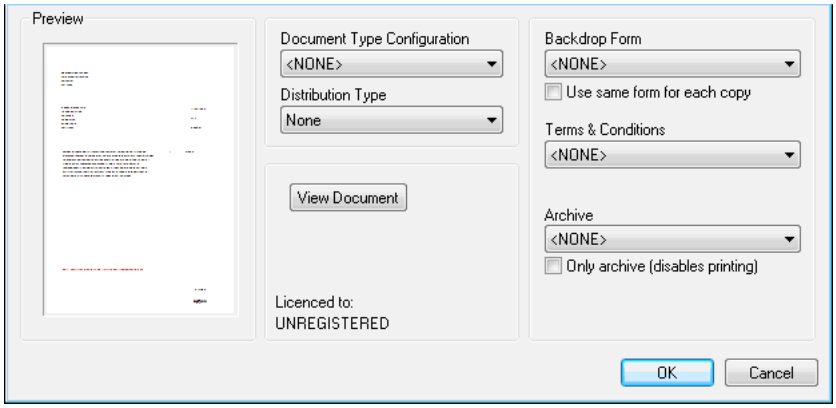
Next, from the Direct Print dialog, select the configurations for your distribution.

Document Type Configuration

From this drop down, you can keep <NONE> selected to continue with a one-off print of a document.

Distribution Type

This drop down allows you to select the distribution method of your document. You can select from None, Printer, Fax or Email.



View Document

Click this button to display a preview of the document in the Spindle Document Distribution Viewer. You can view how the backdrop form will appear by selecting it from the backdrop form drop down.

The settings common to all Distribution Types are;

Backdrop Form

Select the Backdrop Form that you would like to apply to your document.

Use same form for each copy: This setting applies the same backdrop form to each copy, if multiple copies are to be processed.

Terms & Conditions

You can select a Terms & Conditions backdrop form which will be added on to the end of your document.

Archive

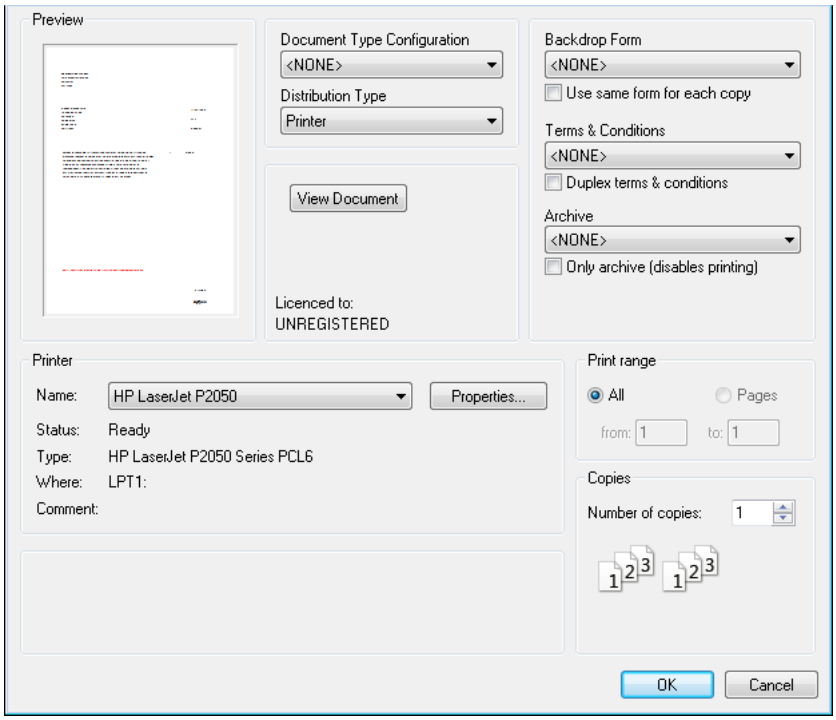
You can select an archive from those defined in the Archive Manager in Spindle Document Distribution Tools. This will archive the document to the specified archive location.

Only archive (disables printing): Selecting this option means only the Archive will be performed and any distribution method selected under Distribution Type will not be performed.

The content below details the options available dependent on the Distribution Type selected;

Printer

Printer settings are enabled if you have selected Printer as the Distribution Type.



Duplex terms & conditions

Applying this option means any ‘Terms & Conditions’ forms selected will be printed duplex.

Name

Select the destination printer to use from the drop down list. You can change the printer properties by clicking the ‘Properties…’ button.

Print Range

All

All pages in the document will be processed by Spindle Document Distribution.

Pages

If the printer has more than one page, you can specify the pages you would like to print. Just select the ‘Pages’ radio button and then specify the range **from** and **to**.

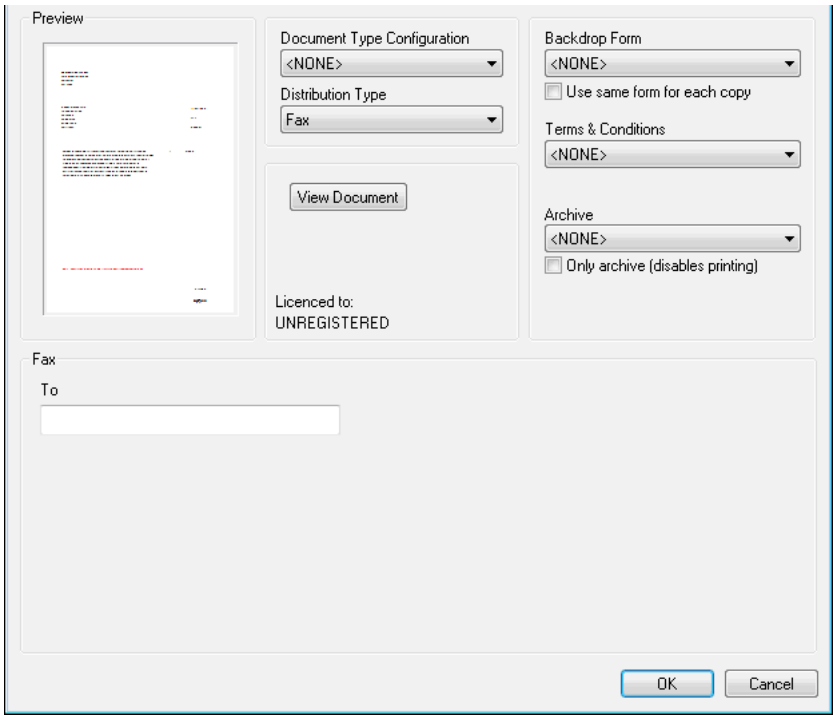
Number of copies

This sets the number of copies to print.

Collate: Tick this option to collate the pages together if you have printed a multi-page document and have set the number of copies to be greater than 1.

Fax

Fax settings are enabled if you have selected Fax as the Distribution Type.

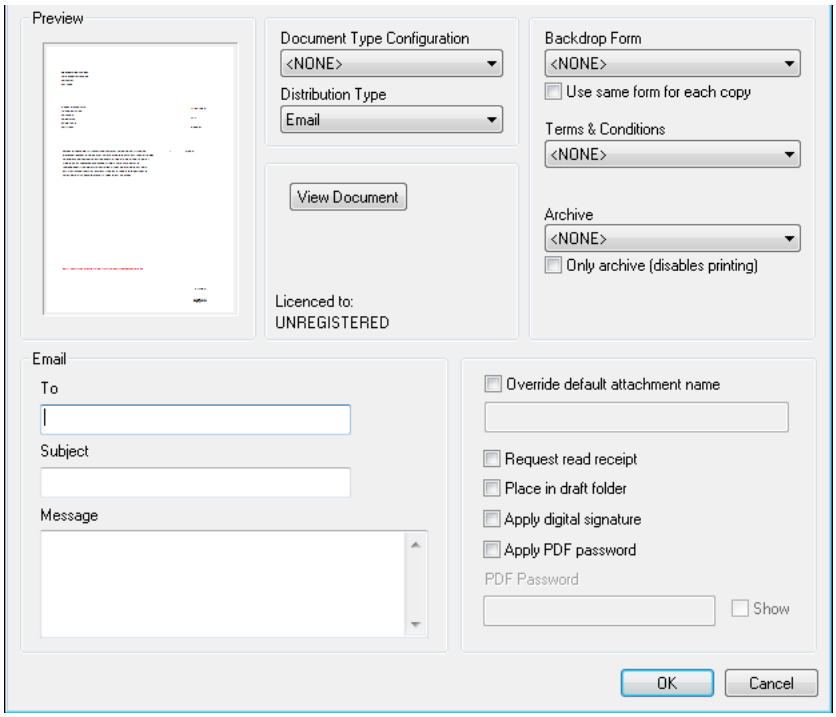


To

Specify the recipient fax number that you want to send the Fax to in this field.

Email

Email settings are enabled if you have selected Email as the Distribution Type. The email will be distributed via the Email device that has been configured in Device Manager/User Settings - Email Settings in Spindle Document Distribution Tools



To

Specify a recipient email address in the ‘To’ field. If you have a value assigned to a ##EMAIL command on your report

design, this field will be auto-populated with that value.

Subject

Specify the subject of the email in the 'Subject' field. You can customise this using ## commands.

Message

Specify the email message that will be sent to the email recipient. ## commands can be used to personalise the message.

Note: Only plain text emails are supported.

Override default attachment name

Allows the name of the generated attachment to be customised, making it more suitable for the contents of the document. Any attachment name not overridden will be called IMG.PDF. The attachment name can be customised using the ## commands.

Request read receipt

Tick this option if you want to be notified via email that the recipient received and read your email. **Note:** You will only receive a receipt if it is supported by your selected email solution and the recipients email package.

Place in draft folder

This will prevent an email from being sent out and instead placed in the user's drafts folder.

Note: Not all email solutions support this feature, therefore emails maybe sent out even if this option is ticked.

Apply digital signature

This provides the facility to electronically sign PDF files. The digital signature will inherit the values that have been configured in the current user's settings. Please refer to the User Settings - Digital Signature Settings User Settings (see page 195) section of this help file for further information and details on how to configure the digital signature.

Apply PDF password

Select this option to enter a manual password in the PDF Password field. To set a password you can;

- Enter free text for a static password.
- Use ## commands.
- Use a combination of both text and ## commands.

For example:

INV##VAR1##ACC##VAR2##

would set the password as INV0005105ACCABC001 when distributed. (Where INV and ACC are free text and ##VAR1 is 0005105 and ##VAR2## is ABC001.)

The **Show** checkbox when enabled displays the text that has been entered into the password field. **Note:** You will notice the 'Apply PDF password' checkbox is disabled when you select 'Apply digital signature' and vice versa when you select 'Apply PDF password', 'Apply digital signature' is disabled. This is because these options are mutually exclusive and cannot be performed together.

Once have configured your distribution type and its corresponding settings, click **OK** and Spindle Document Distribution will process the document according to your distribution method and its settings.

8.8 Attach documents archived in Spindle Document Capture to my email distributions

As part of the Spindle Document Capture integration, you are able to add a '##SDCATTACH <*search criteria*>##' command onto your documents. Dependent on the search criteria supplied, Spindle Document Capture will return all matching files from its archive repository and attach them to the outgoing email distribution.

Example scenarios:

- Email a Sales Invoice and attach archived Proof of Delivery documents
- Email a Sales Invoice and attach the archived Customers Purchase Order
- Email a Sales Invoice and attach your archived Terms and Conditions of Purchase
- Email a Sales Order Acknowledgement and attach the archived Customers Purchase Order
- Email a Purchase Order and attach the archived Quotation from the supplier
- Email a Statement and attach related archived Sales Invoices

Configuring SDCATTACH

1. Configure the connection details to your Spindle Document Capture server (see page 203).
2. Add the SDCATTACH command with search criteria onto your documents.

The search criteria on the SDCATTACH command must be represented using special syntax that Spindle Document Capture understands. A combination of the following parameters can be supplied:

[DATASETID=*value*]*

The dataset / company in your accounting system that you would like to return files for.

[DT=*value*]*

The **D**ocument **T**ype of the files you would like to attach. Examples of Document Types in Spindle Document Capture are Sales Invoice, Proof of Delivery and Supplier Statement.

[LT=*value*]

The **L**inkage **T**ype (identifying the Sage object) that the files you would like to attach are linked to in the accounting system.

Valid options for Sage 200 include - Customer, Sales Order, Sales Quotation, Sales Order Return, Pro Forma, Customer Transaction, Supplier, Purchase Order, Purchase Order Return, Supplier Transaction, Nominal Transaction, Expense Claims and Timesheets.

[LR *key*=*value*]

The **L**ink **R**eference items (related to the Linkage Type) that uniquely identify the Sage entity that the files you would like to attach are linked to in the accounting system. Examples of LR items are Company Id, Customer Reference and Document No.

[AD *key*=*value*]

The **A**ssociated **D**ata items that are associated to the files you would like to attach.

Additional parameters that can be supplied to narrow down the search results:

[LASTUPLOADED]

If LASTUPLOADED is supplied, Spindle Document Capture will only return the last uploaded file meaning only 1 file will ever be attached.

[EXT=*value*]

You can specify a file extension if you are only interested in files of a particular type being returned by Spindle Document Capture e.g. PDF.

*required

Note:

- At least one LR or AD must also be supplied.
- If supplying dates as part of your search criteria, then the date format will be assumed from your current culture settings. If you would like to specify a different date format, please use the global ##DATEFORMAT command. For example ##DATEFORMAT ddmmyyyy##.

3. You can specify if you would like Spindle Document Distribution to error and stop the email distribution if the SDCATTACH command returns no files. By default, the email distribution will continue even if there are no files to attach. See Configuring Spindle Document Distribution > Document Automation > Document Settings > Email Settings > File Attachments Tab (see page 85) for more information.

Example SDCATTACH commands for Sage 200 layouts

If you are using Spindle Document Capture with Sage 200, below you will find some example expressions that can be placed on your Sage 200 layouts. When these documents are then printed to Spindle Document Distribution, archived files that match the search criteria supplied will be attached to the outgoing email distributions.

- Attach Proof of Delivery documents on outbound Sales Invoices. On the Sales Invoice layout add:

"##SDCATTACH [DT=Proof of Delivery][LT=Sales Order][LR Customer Reference="+ SLCustomerAccounts.CustomerAccountNumber +"][LR Document No="+ SOPOrderReturns.DocumentNo +"]##"

- Attach Customers Purchase Order documents on outbound Sales Invoices. On the Sales Invoice layout add:

"##SDCATTACH [DT=Customer Purchase Order][LT=Sales Order][LR Customer Reference="+ SLCustomerAccounts.CustomerAccountNumber +"][LR Document No="+ SOPOrderReturns.DocumentNo +"]##"

- Attach your Terms and Conditions of Purchase on outbound Sales Invoices. On the Sales Invoice layout add:

"##SDCATTACH [DT=Terms and Conditions of Purchase][LT=Customer][LR Customer Reference="+ SLCustomerAccounts.CustomerAccountNumber +"][LASTUPLOADED]##"

- Attach Customers Purchase Order documents on outbound Sales Order Acknowledgements. On the Sales Order Acknowledgment layout add:

"##SDCATTACH [DT=Customer Purchase Order][LT=Sales Order][LR Customer Reference="+ SLCustomerAccounts.CustomerAccountNumber +"][LR Document No="+ SOPOrderReturns.DocumentNo +"]##"

- Attach suppliers Quotations on outbound Purchase Orders. On the Purchase Order layout add:

"##SDCATTACH [DT=Quotation from Supplier][LT=Purchase Order][LR Supplier Reference="+ PLSupplierAccounts.SupplierAccountNumber +"][LR Document No="+ POPOrderReturns.DocumentNo +"]##"

- Attach Sales Invoices on outbound Statements. On the Statement and Advice layout add:

"##SDCATTACH [DT=Sales Invoice][LT=Customer Transaction][LR Customer Reference="+ SLCustomerAccounts.CustomerAccountNumber +"][LR Transaction Reference="+ SLPostedCustomerTrans.TransactionReference +"][LR Transaction Date="+ SLPostedCustomerTrans.TransactionDate +"][LR Transaction Type=Invoice]##"

8.9 Add a Pay Now button onto outbound documents

Using the Spindle Document Distribution PayThem functionality, you will be able to place a clickable 'Pay Now' button on your outbound PDF documents, or add a payment link on your outbound emails (see page 223). Clicking the button or payment link will allow the recipient to pay you via the payment provider you have set up in Integration Manager (see page 141).

Steps to add a 'Pay Now' button onto outbound PDF documents:

1. Ensure you have entered a valid PayThem licence key (see page 54).
2. Set up a PayThem service.
3. Map the required fields on your document layouts.
4. Select the PayThem service on your Document Operation > PayThem tab (see page 72).
5. Place a ##PAYTHEM## command on your layout. The position of the 'Pay Now' button will be determined my the placement of the ##PAYTHEM## command.

8.9.1 Add a Sage Pay - Pay Now button onto Sage 200 layouts

To use the Pay Now button on your Sage 200 documents, you will need to add some additional commands onto the corresponding Sage 200 layouts. These commands will extract relevant data relating to the document required by the PayThem functionality.

The Sage 200 Add-On package supplied with the Spindle Document Management installer, deploys layout files with all of the necessary Sage Pay commands pre-populated on them.

From the layouts that are deployed, the following relevant layouts have the Sage Pay commands already on them:

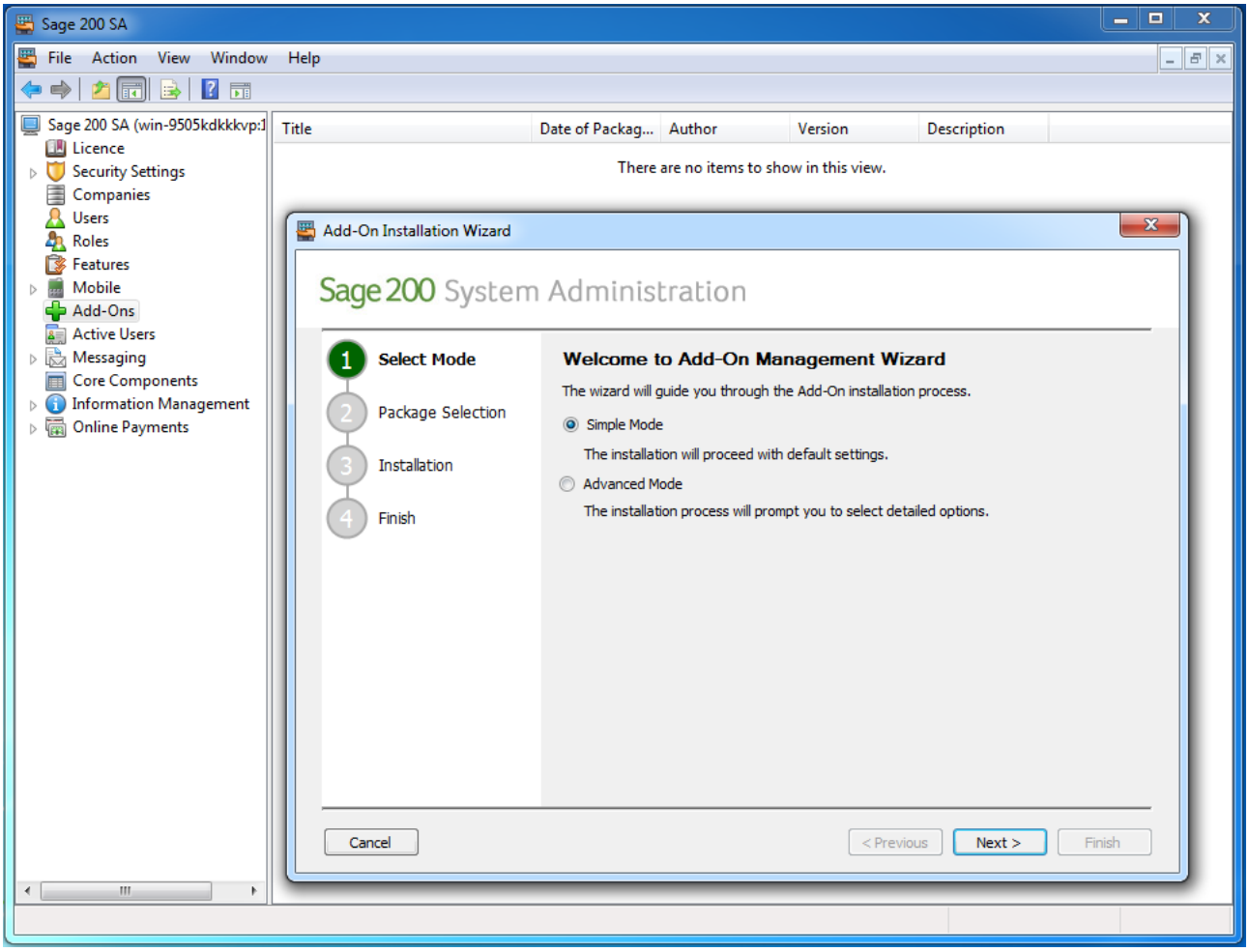
- SOP Invoice (Single)
- SOP Pro Forma (Single)
- Sales Ledger Statement with Advice (Single)

If you have already added the Spindle Custom Layouts add-on package (for SDC archives) you will already have these layouts in your Sage 200 (custom) layouts folder. (As per Adding custom Sage 200 layouts with archive commands (see page 16))

Note: We strongly recommend that you back up all of your existing layout files within the Sage custom layouts folder prior to deploying the add-on package.

Steps to add the Add-On package:

1. Log into the Sage 200 System Administration tool
2. On the left hand navigation bar, right-click on **Add-Ons**
3. Select **Add New Add-On**
4. Select Simple Mode and click **Next**



5. **Browse** for the Spindle Custom Layouts.sdbx package in:

C:\Program Files (x86)\Draycir\Spindle Document Management\Spindle Document Management Server\Add-Ons\Sage 200 - *then select the version of Sage 200 that you have*

6. Click **Open**
7. Click **Install**
8. Click **Finish** to complete the wizard

For Sage 200 200 2010 and 2011, when the Add-On package is installed, the file is deployed to 'C:\Sage\Layouts'.

For Sage 200 200 2013, 2015 and 2016, when the Add-On package is installed, the file is deployed to 'C:\Sage\reporting\custom\layouts'.

Using your own custom layouts

If you are not using the supplied packaged Sage 200 layouts which have the Sage Pay commands on them, then you can follow the steps below to customise your own layouts to include the necessary commands for the Sage Pay functionality.

SOP Invoice (Single)

To retrieve the Billing Address Country Code, Delivery Address Country Code and the Currency ISO Code on the SOP Invoice (Single) layout, there needs to be some table joins added to the layout. Please follow the steps below:

- Open your Sage 200 SOP Invoice layout
- If you are using Sage 200 2010 or 2011

From the toolbar click on the ‘Data’ menu item and then select ‘Joins’

- If you are using Sage 200 2013, 2015 or 2016

From the toolbar click on the ‘Report’ menu item and then select ‘Joins’

- From the resultant ‘Join Editor’ screen click on ‘Use raw text editor’ in the bottom left corner.
- The Join Editor appears which has all the joins for the report layout defined. You will need to Copy and Paste the following lines to the bottom of the existing join statements:

LEFT OUTER JOIN [SYSCountryCodes] AS [SYSCountryCodes1] ON SOPInvCredAddresses.Country = SYSCountryCodes1.Name

LEFT OUTER JOIN [SYSCountryCodes] AS [SYSCountryCodes2] ON SOPInvCredDelAddresses.Country = SYSCountryCodes2.Name

INNER JOIN [SYSCurrencyISOCodes] ON SYSCurrencies.SYSCurrencyISOCodeID = SYSCurrencyISOCodes.SYSCurrencyISOCodeID

- Click ‘OK’

You can now copy the contents of the expression Spindle1 from the packaged SOP Invoice (Single) layout into an expression on your own layout.

- Add the ##PAYTHEM## command (the expression is called Spindle2 on the packaged layout in the footer) wherever you would like the 'Pay Now' button to appear on your invoice. The positioning of the button on the PDF file is determined by the placement of the ##PAYTHEM## command on the layout.

SOP Pro Forma (Single)

To retrieve the Billing Address Country Code, Delivery Address Country Code and the Currency ISO Code on the SOP Pro Forma (Single) layout, there needs to be some table joins added to the layout. Please follow the steps below:

- Open your Sage 200 SOP Pro Forma layout
- If you are using Sage 200 2010 or 2011

From the toolbar click on the ‘Data’ menu item and then select ‘Joins’

- If you are using Sage 200 2013, 2015 or 2016

From the toolbar click on the ‘Report’ menu item and then select ‘Joins’

- From the resultant ‘Join Editor’ screen click on ‘Use raw text editor’ in the bottom left corner.
- The Join Editor appears which has all the joins for the report layout defined. You will need to Copy and Paste the following lines to the bottom of the existing join statements:

INNER JOIN [SYSCountryCodes] AS [SYSCountryCodes1] ON SLCustomerLocations.SYSCountryCodeID = SYSCountryCodes1.SYSCountryCodeID

LEFT OUTER JOIN [SYSCountryCodes] AS [SYSCountryCodes2] ON SOPDocDelAddresses.CountryCodeID = SYSCountryCodes2.SYSCountryCodeID

INNER JOIN [SYSCurrencyISOCodes] ON SYSCurrencies.SYSCurrencyISOCodeID = SYSCurrencyISOCodes.SYSCurrencyISOCodeID

- Click ‘OK’

You can now copy the contents of the expression Spindle1 from the packaged SOP Pro Forma (Single) layout into an expression on your own layout:

If you use the report header 2, you can do the same and copy the contents of the expression Spindle2 from the packaged SOP Pro Forma (Single) layout into an expression on your own layout.

- Add the ##PAYTHEM## command (the expression is called Spindle3 on the packaged layout in the footer) wherever you would like the 'Pay Now' button to appear on your Pro Forma. The positioning of the button on the PDF file is determined by the placement of the ##PAYTHEM## command on the layout.

Sales Ledger Statement with Advice (Single)

To retrieve the Currency ISO Code on the Sales Ledger Statement with Advice (Single) layout, there needs to a table joins added to the layout. Please follow the steps below:

- Open your Sage 200 Sales Ledger Statement with Advice layout
- If you are using Sage 200 2010 or 2011

From the toolbar click on the ‘Data’ menu item and then select ‘Joins’

- If you are using Sage 200 2013, 2015 or 2016

From the toolbar click on the ‘Report’ menu item and then select ‘Joins’

- From the resultant ‘Join Editor’ screen click on ‘Use raw text editor’ in the bottom left corner.
- The Join Editor appears which has all the joins for the report layout defined. You will need to Copy and Paste the following lines to the bottom of the existing join statements:

INNER JOIN [SYSCurrencyISOCodes] ON SYSCurrencies.SYSCurrencyISOCodeID = SYSCurrencyISOCodes.SYSCurrencyISOCodeID

- Click ‘OK’

You can now copy the contents of the expression Spindle1 from the packaged Sales Ledger Statement with Advice (Single) layout into an expression on your own layout.

If you use the report header 2, you can do the same and copy the contents of the expression Spindle2 from the packaged Sales Ledger Statement with Advice (Single) layout into an expression on your own layout.

In the footer, you will need to assign a value to the amount field. The recipient of the statement will be able to pay this amount via Sage Pay. For example, you can assign the whole amount of the Statement to the ##AMOUNT command using the following:

"##AMOUNT " + Sum(SLPostedCustomerTrans.OutstandingValue) + "##"

- Add the ##PAYTHEM## command (the expression is called Spindle4 on the packaged layout in the footer) wherever you would like the 'Pay Now' button to appear on your invoice. The positioning of the button on the PDF file is determined by the placement of the ##PAYTHEM## command on the layout.

Mapping ##DATASETID## on layout

When using the Spindle Reconciler to allocate payments back into Sage 200, the DATASETID (Sage 200 Company ID) will need to be supplied via the layout.

If using Sage 200 2013, 2015 or 2016

The following command is already populated on the supplied custom layouts:

“##DATASETID " + SYSCompanies.CompanyNumber + "##"

If using Sage 200 2010 or 2011

SYSCompanies.CompanyNumber was not exposed.

A suggested solution would be to use the DateTimeCreated field on the SYSCompanies table, and map the DATASETID against this value.

In SQL Server Management Studio:

- Open the Company database
- On the SYSCompany table, make a note of the DateTimeCreated value
- Convert the dates to the format yyyyMMddHHmmss. e.g. ‘15/06/2009 15:18:52’ becomes ‘20090615151852’.
- Once you have all of your dates in that format, you assign each of those to the appropriate DATASETID. The DATASETID can be retrieved from Sage200Configuration.tblCompany – CompanyID field.

Example expression to be added to your Sage 200 2010 or 2011 layouts (where '6' and '5' are examples of Company ID's):

"##DATASETID " + (DateTimeToFormattedString(SYSCompanies.DateTimeCreated, "yyyyMMddHHmmss") = "20090615151852" ? 6: DateTimeToFormattedString(SYSCompanies.DateTimeCreated, "yyyyMMddHHmmss") = "20100615151852" ? 5: DateTimeToFormattedString(SYSCompanies.DateTimeCreated, "yyyyMMddHHmmss")) + "##"

Note: If a new company is created in Sage 200, this expression will need to be amended on every layout it has been used on.

8.10 Add a payment link onto outbound emails

Using the Spindle Document Distribution PayThem functionality, you will be able to place a clickable 'Pay Now' button on your outbound PDF documents (see page 219), or add a payment link on your outbound emails. Clicking the button or payment link will allow the recipient to pay you via the payment provider you have set up in Integration Manager (see page 141).

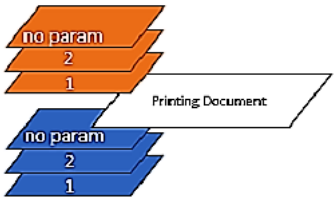
Steps to add a payment link onto outbound emails:

1. Ensure you have entered a valid PayThem licence key (see page 54).
2. Set up a PayThem service.
3. Map the required fields on your document layouts.
4. Select the PayThem service on your Document Operation > PayThem tab (see page 72).
5. On the Document Operation > Email Settings (see page 81), you will need to add a ##PAYTHEMURL## command inside a href tag (using the HTML editor) to add the payment link on your emails. e.g. Click here to pay the invoice

8.11 Use multiple form layers

Using the OVERFORM and FORM commands you can layer multiple forms both above and below the documents text. By adding a parameter into the commands you can choose how close or far away from the document test the forms are layered.

The diagram below shows the parameters set which layer each form is on:



When using the ##OVERFORM## command if you don't specify a parameter and other overlays with parameters are being used it will be placed on top of the stack. When using the ##FORM## command if you don't specify a parameter and other underlay forms with parameters are being used it will be placed closest to the document test i.e above the other underlay forms.

A document that needs an overdue stamp and some confidential information redacted.

Create forms for each layer e.g Redacted and Overdue Stamp and add to Spindle using the form creator.

Add the command ##OVERFORM[1] Redacted## to your document. Spindle will add the form above the text on the document so confidential information can be blanked out. Then, to add the Overdue form above the document text and the Redacted form use the command ##OVERFORM[2] Overdue Stamp## .

A document that needs a watermark and an aged debt note.

Create form for each layer e.g Watermark and Aged Debt 90 and add to Spindle using the form creator.

Add the command ##FORM[1] Watermark## to your document. Spindle will add the form below any text on the document and other forms with parameters. Then, to add the Aged Debt note form above the watermark and below the actual document text use the command ##FORM[2] Aged Debt 90## .

9 Command Reference

Document Automation is achieved by placing Spindle Document Distribution 'commands' in your documents and/or using data sources. When the document is printed to the Spindle Document Distribution printer these commands are removed from the document and used to determine how the document should be processed.

All command strings begin with the characters ##. This is followed by the command name which, depending on the particular command, can be followed by data. Finally the command string is terminated with another ##.

Commands fall into two main categories; Embedded and Parse.

Embedded Commands

These commands are 'embedded' or written into the document and are used to either gather data such as email addresses, account numbers, statement value etc, or to perform an action within Spindle Document Distribution such as set the Document Automation record to use or override a backdrop form. Examples of embedded commands:

##CFG Invoices##

##EMAIL accounts@draycir.com##

VAR1 ABC0001##

VAR16 1,364.76##

Parsed Commands

Parsed commands are used throughout Document Automation and are used to insert variable information into email messages, subject titles, archive folder paths, email addresses and much more. Commands that are classed as embedded can also be used in this way but there are commands that can only be used as parse commands and cannot be embedded into document layouts. Examples of parse commands:

##DATE##

##SENTTYPE##

##USER

9.1 ACCOUNTREF

Capabilities

ACCOUNTREF <account reference>

✔Embedded ✔Data ✔Parse ✔Split

Description

Specify the Account Reference.

Example

```
##ACCOUNTREF ABB001##
```

9.2 AMOUNT

Capabilities

AMOUNT <amount value>

☑Embedded ☑Data ☐Parse ☐Split

Description

Specify an amount value e.g. an Invoice amount.

Example

```
##AMOUNT 1000.00##
```

9.3 ATTACH

Capabilities

ATTACH <name of file to attach>

☑Embedded ☑Data ☐Parse ☐Split

Description

Attaches a file to an outgoing email. If the full path to the file is not provided then Spindle Document Distribution will search for the file in the paths provided by the ATTACHDIR command. Standard file wildcards can be used. This command can appear more than once on the same page.

Can also attach files which are located on the web by using a URL within the ATTACH command. This includes support for HTTP, HTTPS and FTP.

Note: Authenticated websites and authenticated FTP are not supported.

Example

```
##ATTACH C:\Archives\Invoices\Invoice3672.pdf##
```

This example attaches the file 'Invoice3672.pdf' from the folder 'C:\Archives\Invoices\'

```
##ATTACHDIR \\Server\Data\Sales Information##
##ATTACHDIR C:\Archives\Marketing Leaflets\##
##ATTACH MaySpecialOffer.pdf##
```

This example first searches for the file 'MaySpecialOffer.pdf' in the folder '\\Server\Data\Sales Information'. If it can't be found it then searches the folder 'C:\Archives\Marketing Leaflets'.

```
##ATTACH C:\Marketing\*.pdf##
```

This example attaches all PDF files found in the folder 'C:\Marketing\'.

```
##ATTACH http://www.draycir.com/invoices/Invoice123.pdf##
```

This example attaches the file 'Invoice123.pdf' from the website 'http://www.draycir.com/invoices'.

```
##ATTACH https://www.draycir.com/invoices/Invoice456.pdf##
```

This example attaches the file 'Invoice456.pdf' from the website 'https://www.draycir.com/invoices'.

```
##ATTACH ftp://ftp.example.com/documents/MarketingOffer.pdf##
```

This example attaches the file 'MarketingOffer.pdf' from the ftp server 'ftp://ftp.example.com/documents'.

9.4 ATTACHDIR

Capabilities

ATTACHDIR <path to attachment folder>

☑Embedded ☑Data ☐Parse ☐Split

Description

Adds the path to the list of attachment directories/folders. These paths are used by the ##ATTACH## command when searching for files. This command can appear more than once on the same page.

Example

```
##ATTACHDIR C:\Archives\Marketing Leaflets\##
```

Adds the path 'C:\Archives\Marketing Leafles' to the list of attachment folders.

9.5 BC

Capabilities

BC01 <custom barcode data> to BC30 <custom barcode data>

☑Embedded ☑Data ☑Parse ☐Split

Description

There are 30 barcode fields which are used to define the data that you want to encode into a barcode. The BC commands are used when creating fixed barcodes or listing barcodes. BC commands have a special ability in that you can define the same BC command on the same page more than once when using them with the listing barcode functions.

Usually, if the same command appears on the same document more than once only the first instance is used and the rest are ignored. See 'Add a listing barcode' for more information.

Example

```
##BC01 PN127389##
##BC02 LE1 7FW##
```

9.6 CFG

Capabilities

CFG <document type name>

☑Embedded ☑Data ☑Parse ☐Split

Description

Defines the name of a pre-defined set of instructions for each document being distributed by Spindle Document Distribution called the Document Type. The Document Type contains a list of Document Operations to be performed on that document. The parameter passed as <document type name> must match up with a Document Type name stored in the Document Automation database. Document Type names are not case sensitive.

Example

```
##CFG Invoices##
```

Would use the Document Type called 'Invoices'

9.7 COMPANY

Capabilities

COMPANY <recipients company name>

☑Embedded ☑Data ☑Parse ☑Split

Description

Specifies the name of the recipients company. This can be left blank.

Example

```
##COMPANY Abbey Retail Ltd##
```

9.8 COMPUTER

Capabilities

COMPUTER

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the name of the computer that the Spindle Document Distribution application is being executed on.

Example

```
This document was processed on the workstation ##COMPUTER##
```

would result in the following string if it were executed on the computer called JASONSXPLT

```
This document was processed on the workstation JASONSXPLT
```

9.9 CRMCOMPANY

Capabilities

CRMCOMPANY <CRM recipients company name>

☑Embedded ☑Data ☑Parse ☑Split

Description

Specify the name of the recipient company stored in the CRM system. This is used to reference the correct CRM account where notes will be created. If this field is empty then the data found in COMPANY is used.

Example

```
##CRMCOMPANY Abbey Retail##
```

9.10 CRMFNAME

Capabilities

CRMFNAME <CRM recipients forename>

✔Embedded ✔Data ✔Parse ✔Split

Description

Specify the forename of the recipient stored in the CRM system. This is used to reference the correct CRM account where notes will be created. If this field is empty then the data found in NAME is used.

Example

```
##CRMFNAME Paul##
```

9.11 CRMSNAME

Capabilities

CRMSNAME <CRM recipients surname>

✔Embedded ✔Data ✔Parse ✔Split

Description

Specify the surname of the recipient stored in the CRM system. This is used to reference the correct CRM account where notes will be created. If this field is empty then the data found in NAME is used.

Example

```
##CRMSNAME Smith##
```

9.12 CURRENCY

Capabilities

CURRENCY <currency code>

✔Embedded ✔Data ✔Parse ✔Split

Description

Specify the currency code.

Example

```
##CURRENCY GBP##
```

9.13 DATE

Capabilities

DATE

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the current date in short hand format taking into account regional settings.

Example

```
The date today is ##DATE##
```

would result in the following string

```
The date today is 14/04/2008
```

9.14 DATEMONDAY

Capabilities

DATEMONDAY

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the date of the next Monday in short hand format taking into account regional settings. If Monday is today then it will insert today's date. This command is primarily used in fax scheduling. See Fax Settings (see page 80) for further information.

Example

```
The next Monday falls on ##DATEMONDAY##
```

would result in the following string

```
The next Monday falls on 8/12/2008
```

9.15 DATETUESDAY

Capabilities

DATETUESDAY

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the date of the next Tuesday in short hand format taking into account regional settings. If Tuesday is today then it will insert today's date. This command is primarily used in fax scheduling. See Fax Settings (see page 80) for further information.

Example

```
The next Tuesday falls on ##DATETUESDAY##
```

would result in the following string

```
The next Tuesday falls on 9/12/2008
```

9.16 DATEWEDNESDAY

Capabilities

DATEWEDNESDAY

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the date of the next Wednesday in short hand format taking into account regional settings. If Wednesday is today then it will insert today's date. This command is primarily used in fax scheduling. See Fax Settings (see page 80) for further information.

Example

```
The next Wednesday falls on ##DATEWEDNESDAY##
```

would result in the following string

```
The next Wednesday falls on 10/12/2008
```

9.17 DATETHURSDAY

Capabilities

DATETHURSDAY

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the date of the next Thursday in short hand format taking into account regional settings. If Thursday is today then it will insert today's date. This command is primarily used in fax scheduling. See Fax Settings (see page 80) for further information.

Example

```
The next Thursday falls on ##DATETHURSDAY##
```

would result in the following string

```
The next Thursday falls on 11/12/2008
```

9.18 DATEFRIDAY

Capabilities

DATEFRIDAY

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the date of the next Friday in short hand format taking into account regional settings. If Friday is today then it will insert today's date. This command is primarily used in fax scheduling. See Fax Settings (see page 80) for further information.

Example

`The next Friday falls on ##DATEFRIDAY##`

would result in the following string

`The next Friday falls on 12/12/2008`

9.19 DATESATURDAY

Capabilities

DATESATURDAY

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the date of the next Saturday in short hand format taking into account regional settings. If Saturday is today then it will insert today's date. This command is primarily used in fax scheduling. See Fax Settings (see page 80) for further information.

Example

`The next Saturday falls on ##DATESATURDAY##`

would result in the following string

`The next Saturday falls on 13/12/2008`

9.20 DATESUNDAY

Capabilities

DATESUNDAY

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the date of the next Sunday in short hand format taking into account regional settings. If Sunday is today then it will insert today's date. This command is primarily used in fax scheduling. See Fax Settings (see page 80) for further information.

Example

`The next Sunday falls on ##DATESUNDAY##`

would result in the following string

`The next Sunday falls on 14/12/2008`

9.21 DAYL

Capabilities

DAYL

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the current day of the week in long hand format taking into account regional settings.

Example

```
The day today is ##DAYL##
```

would result in the following string

```
The day today is Monday
```

Tip: You can use this command to build up archive directory structures, e.g. 'F:\Archives\Statements\##YEARS##-##MONTHS##\##VAR1##'

9.22 DAYN

Capabilities

DAYN

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the current day of the month as a number.

Example

```
##DAYN##-##MONTHN##-##YEARS##
```

would result in the following string

```
14-04-08
```

Tip: You can use this command to build up archive directory structures, e.g. 'F:\Archives\Statements\##YEARS##-##MONTHS##\##VAR1##'

9.23 DAYS

Capabilities

DAYS

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the current day of the week in short hand format taking into account regional settings.

Example

```
##DAYS##
```

would result in the following string

```
Mon
```

Tip: You can use this command to build up archive directory structures, e.g. 'F:\Archives\Statements\##YEARS##-##MONTHS##\##VAR1##'

9.24 DBVAR01

Capabilities

DBVAR01 <custom variable data> to DBVAR30 <custom variable data>

✔Embedded ✔Data ✔Parse ☐Split

Description

There are 30 DBVAR fields which are used primarily by 'Data Links' to assign field values from database records. These fields can be used to build up subject titles, personalise email messages and be used as the key data to lookup information in other databases. However, these commands can also be embedded into documents.

Example

```
##DBVAR01 ABC001##
##DBVAR02 PO123456##
##DBVAR15 from Document Date##
```

9.25 DOCUMENTNO

Capabilities

DOCUMENTNO <document number>

✔Embedded ✔Data ✔Parse ✔Split

Description

Specify the Document Number from your ERP system.

Example

```
##DOCUMENTNO 123456##
```

9.26 EMAIL

Capabilities

EMAIL <recipients email address>

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the recipients email address. This command is only required if you wish to email documents. You can send to multiple email addresses by separating them with a semi-colon.

Example

```
##EMAIL accounts@draycir.com##
```

or

```
##EMAIL accounts@draycir.com;sales@draycir.com##
```

9.27 ENDDOC

Capabilities

ENDDOC

☑Embedded ☐Data ☐Parse ☐Split

Description

Forces Spindle Document Distribution to stop checking further pages and to distribute the pages it has currently gathered. Once these pages have been distributed, Spindle Document Distribution will continue checking the remaining pages. **This command is here for historical reasons and generally should not be used.**

Example

```
##ENDDOC##
```

9.28 ERPCOMPANY

Capabilities

ERPCOMPANY <your company name>

☑Embedded ☑Data ☑Parse ☑Split

Description

Specifies the name of your company from your ERP system.

Example

```
##ERPCOMPANY HomeStyle Kitchen Ltd##
```

9.29 FAX

Capabilities

FAX <recipients fax number>

☑Embedded ☑Data ☑Parse ☑Split

Description

Specifies the recipients fax number. This command is only required if you wish to fax documents.

Example

```
##FAX 0870 011 8910##
##FAX 08700118910##
```

9.30 FORM

Capabilities

FORM <form name>

☑Embedded ☑Data ☐Parse ☐Split

Description

Selects the name of the backdrop form to use on the current page. This command can be used to override any forms that have been selected in the Document Operation.

Example

```
##FORM Invoice GBP##
```

would use the form called 'Invoice GBP' on the page this command was found on.

💡Tip: This command can be disabled in a Document Operation and in each distribution method type within the Document Operation by ticking the 'Disable FORM override commands' box.

9.31 OVERFORM

Capabilities

OVERFORM <form name>

☑Embedded ☑Data ☐Parse ☐Split

Description

Selects the name of the overlay form to use on the current page. This command can be used to override any forms that have been selected in the Document Operation.

Example

```
##OVERFORM Overdue##
```

would add the form called Overdue on the page this command was found on, it would be added over the top of the text.

9.32 MONTHL

Capabilities

MONTHL

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the current month in long hand format taking into account regional settings.

Example

```
##DAYN## ##MONTHL## ##YEARL##
```

would result in the following string

```
14 April 2008
```

Tip: You can use this command to build up archive directory structures, e.g. 'F:\Archives\Statements\##YEARL##-##MONTHL##\##VAR1##'

9.33 MONTHN

Capabilities

MONTHN

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the current month as a number.

Example

```
##DAYN##-##MONTHN##-##YEARS##
```

would result in the following string

```
14-04-08
```

Tip: You can use this command to build up archive directory structures, e.g. 'F:\Archives\Statements\##YEARL##-##MONTHN##\##VAR1##'

9.34 MONTHS

Capabilities

MONTHS

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the current month in short hand format taking into account regional settings.

Example

```
##DAYN## ##MONTHS## ##YEARS##
```

would result in the following string

```
14 Apr 08
```

Tip: You can use this command to build up archive directory structures, e.g. 'F:\Archives\Statements\##YEARS##-##MONTHS##\##VAR1##'

9.35 NAME

Capabilities

NAME <recipients name>

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the name of the recipient. This can be left blank.

Example

```
##NAME Andrew Lowe##
```

9.36 PAYTHEM

Capabilities

PAYTHEM

✔Embedded ☐Data ☐Parse ☐Split

Description

The PAYTHEM command inserts a 'Pay Now' button onto your PDF document if you have configured and enabled a PAYTHEM Service. See How do I add a Pay Now button onto outbound documents (see page 219) for more information.

Example

```
##PAYTHEM##
```

9.37 PAYTHEMURL

Capabilities

PAYTHEMURL

☐Embedded ☐Data ✔Parse ☐Split

Description

The PAYTHEMURL command inserts a payment URL to be used on outbound emails, if you have configured and enabled a PAYTHEM Service. The PAYTHEMURL command is intended to be used inside a href tag (using the HTML editor) e.g. Click here to pay the invoice. See How do I add a payment link onto outbound emails (see page 223) for more information.

Example

```
##PAYTHEMURL##
```

9.38 PDFPASSWORD

Capabilities

PDFPASSWORD <password to be applied>

✔Embedded ✔Data ✔Parse ✔Split

Description

A PDFPASSWORD command can be used to set a Document Open Password on your PDF documents. If using this command you will also need to ensure you select the appropriate option on the PDF Settings interface in Spindle Document Distribution Tools.

Example

```
##PDFPASSWORD test##
```

9.39 PREF

Capabilities

PREF <preferred distribution method>

✔Embedded ✔Data ✔Parse ☐Split

Description

Describes the preferred distribution method to be used and the distribution methods to exclude. This is used in conjunction with, and to override the order of, the methods selected in the Document Automation record. The preference command can be made up of the following characters:

- P = Print method
- E = Email method
- F = Fax method
- ! = Exclude methods - any methods following this character are excluded

Example 1

In this example the methods of distribution have been setup in the Document Operation as follows:

- 1st Fax
- 2nd Email
- 3rd None

By default if the ##FAX command contained data then the document would be faxed. If there was no fax number and the ##EMAIL command contained data then the document would be emailed. If neither ##FAX or ##EMAIL was found the document would be skipped.

However, if the following was used:

```
##PREF EFP##
```

This means the preferred method of distribution is, 1st Email, 2nd Fax and 3rd Print. If the ##EMAIL command contained data then the document would be emailed. This would override the order in the Document Operation as Fax was selected as the first method to use.

Example 2

In this example the methods of distribution are the same as in example 1.

The preference command has been setup as:

```
##PREF E##
```

This means that the preferred method of distribution is email. Because there is no reference to F or P (Fax and Print) we are not concerned if these methods are used or not, we are just stating our preferred method is email.

If the ##EMAIL command contained data then the document would be emailed. However, if no email address was found but the ##FAX command contained data, the document would be faxed as this is still a valid method of distribution as it is an option available in the Document Operation.

Example 3

In this example the methods of distribution have been setup in the Document Operation as follows:

- 1st Email

- 2nd Fax
- 3rd Print

If the ##EMAIL command contained data then the document would be emailed. If there was no email address and the ##FAX command contained data then the document would be faxed. If neither the ##EMAIL or ##FAX commands contained data then the document would be printed.

However, if the preference command was set up as:

```
##PREF FP!E##
```

This means the preferred distribution method is fax followed by printing. In this case the command is also stating that email should never be used. It has been excluded as a distribution method.

Tip: The Spindle Document Distribution Sage 200 / Sage MMS contacts database uses the PREF command to setup the distribution method for each client. Use Microsoft Access to take a look at the contacts database to see how this works.

9.40 REFERENCENO

Capabilities

REFERENCENO <reference number>

✔Embedded ✔Data ✔Parse ✔Split

Description

Specify a reference number from your ERP system e.g. the Customer's Order Number

Example

```
##REFERENCENO HS542##
```

9.41 SDCATTACH

Capabilities

SDCATTACH <specify search criteria to return files that are archived in Spindle Document Capture>

✔Embedded ✔Data ☐Parse ☐Split

Description

Attach a file(s) that is archived in Spindle Document Capture to an outgoing email distribution.

This is achieved by supplying search criteria (using special syntax that Spindle Document Capture understands) within an SDCATTACH command. A combination of the following parameters can be supplied:

[DATASETID=*value*]*

The dataset / company in your accounting system that you would like to return files for.

[DT=*value*]*

The **D**ocument **T**ype of the files you would like to attach. Examples of Document Types in Spindle Document Capture are Sales Invoice, Proof of Delivery and Supplier Statement.

[LT=*value*]

The **L**inkage **T**ype (identifying the Sage object) that the files you would like to attach are linked to in the accounting system.

Valid options for Sage 200 include - Customer, Sales Order, Sales Quotation, Sales Order Return, Pro Forma, Customer Transaction, Supplier, Purchase Order, Purchase Order Return, Supplier Transaction, Nominal Transaction, Expense Claims and Timesheets.

[LR *key=value*]

The **L**ink **R**eference items (related to the Linkage Type) that uniquely identify the Sage entity that the files you would like to attach are linked to in the accounting system. Examples of LR items are Company Id, Customer Reference and Document No.

[AD *key=value*]

The **A**ssociated **D**ata items that are associated to the files you would like to attach.

Additional parameters that can be supplied to narrow down the search results:

[LASTUPLOADED]

If LASTUPLOADED is supplied, Spindle Document Capture will only return the last uploaded file meaning only 1 file will ever be attached.

[EXT=*value*]

You can specify a file extension if you are only interested in files of a particular type being returned by Spindle Document Capture e.g. PDF.

*required

Note:

- At least one LR or AD must also be supplied.
- If supplying dates as part of your search criteria, then the date format will be assumed from your current culture settings. If you would like to specify a different date format, please use the global ##DATEFORMAT command. For example ##DATEFORMAT ddmmyyyy##.

Example

```
##SDCATTACH [DT=Proof of Delivery][LT=Sales Order][LR Customer Reference=Test][LR Document
No=123456]##
```

9.42 SDCBARCODE

Capabilities

SDCBARCODE

✔Embedded ✔Data ✔Parse ☐Split

Description

The SDCBARCODE command generates a unique barcode value to be used with Spindle Document Capture. The Barcode Design (only Code 39 is compatible) and the barcode placement will be determined by the Fixed Barcode or Barcode Listing settings on the Operation.

Example

```
##SDCBARCODE##
```

9.43 SENTTYPE

Capabilities

SENTTYPE

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts how the document was distributed, e.g. Email, Fax or Printer.

Example

```
Invoice number ##VAR1## was sent to the client by ##SENTTYPE##
```

would result in the following string if the document had been distributed via email

```
Invoice number 003847 was sent to the client by Email
```

Tip: This command can be used in the CRM module to note how the document was sent to a client.

9.44 SMTPPASSWORD

Capabilities

SMTPPASSWORD <password to be applied>

☑Embedded ☑Data ☑Parse ☐Split

Description

The SMTPPASSWORD command can be used to set a password for use in the Account Password field of the SMTP Email Device. See Device Manager - SMTP (see page 162) for further information.

Example

```
##SMTPPASSWORD test123##
```

9.45 SPCOMPANY

Capabilities

CMD <params>

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the Spindle Document Distribution users company name. This can be set in the user options area of Spindle Document Distribution Tools.

Example

```
Please find attached your invoice.

Best regards
##SPUSERNAME##
##SPCOMPANY##
Email: ##SPUSEREMAIL##
```

```
Tel: ##SPUSERTEL##
Fax: ##SPUSERFAX##
```

would result in the following output

```
Please find attached your invoice.

Best regards
John Smith
ABC Company Ltd
Email: john.smith@abccompany.com
Tel: 0845 123 2941
Fax: 0870 011 8910
```

9.46 SPUSEREMAIL

Capabilities

SPUSEREMAIL

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the Spindle Document Distribution users email address. This can be set in the user options area of Spindle Document Distribution Tools.

Example

```
Please find attached your invoice.

Best regards
##SPUSERNAME##
##SPCOMPANY##
Email: ##SPUSEREMAIL##
Tel: ##SPUSERTEL##
Fax: ##SPUSERFAX##
```

would result in the following output

```
Please find attached your invoice.

Best regards
John Smith
ABC Company Ltd
Email: john.smith@abccompany.com
Tel: 0845 123 2941
Fax: 0870 011 8910
```

9.47 SPUSERFAX

Capabilities

SPUSERFAX

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the Spindle Document Distribution users fax number. This can be set in the user options area of Spindle Document Distribution Tools.

Example

```
Please find attached your invoice.
```

```
Best regards
##SPUSERNAME##
##SPCOMPANY##
Email: ##SPUSEREMAIL##
Tel: ##SPUSERTEL##
Fax: ##SPUSERFAX##
```

would result in the following output

```
Please find attached your invoice.

Best regards
John Smith
ABC Company Ltd
Email: john.smith@abccompany.com
Tel: 0845 123 2941
Fax: 0870 011 8910
```

9.48 SPUSERNAME

Capabilities

SPUSERNAME

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the Spindle Document Distribution users name. This can be set in the user options area of Spindle Document Distribution Tools.

Example

```
Please find attached your invoice.

Best regards
##SPUSERNAME##
##SPCOMPANY##
Email: ##SPUSEREMAIL##
Tel: ##SPUSERTEL##
Fax: ##SPUSERFAX##
```

would result in the following output

```
Please find attached your invoice.

Best regards
John Smith
ABC Company Ltd
Email: john.smith@abccompany.com
Tel: 0845 123 2941
Fax: 0870 011 8910
```

9.49 SPUSERTEL

Capabilities

SPUSERTEL

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the Spindle Document Distribution users telephone number. This can be set in the user options area of Spindle

Document Distribution Tools.

Example

```
Please find attached your invoice.

Best regards
##SPUSERNAME##
##SPCOMPANY##
Email: ##SPUSEREMAIL##
Tel: ##SPUSERTEL##
Fax: ##SPUSERFAX##
```

would result in the following output

```
Please find attached your invoice.

Best regards
John Smith
ABC Company Ltd
Email: john.smith@abccompany.com
Tel: 0845 123 2941
Fax: 0870 011 8910
```

9.50 SPUSERWEBSITE

Capabilities

SPUSERWEBSITE

☐ Embedded ☐ Data ☑ Parse ☐ Split

Description

Inserts the Spindle Document Distribution users website. This can be set in the user options area of Spindle Document Distribution Tools.

Example

```
Please find attached your invoice.

Best regards
##SPUSERNAME##
##SPCOMPANY##
Email: ##SPUSEREMAIL##
Tel: ##SPUSERTEL##
Fax: ##SPUSERFAX##
Website: ##SPUSERWEBSITE##
```

would result in the following output

```
Please find attached your invoice.

Best regards
John Smith
ABC Company Ltd
Email: john.smith@abccompany.com
Tel: 0845 123 2941
Fax: 0870 011 8910
Website: www.ABC-Company.com
```

9.51 TIME

Capabilities

TIME

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the current time taking into account regional settings.

Example

```
The current time is ##TIME##
```

would result in the following string

```
The current time is 20:14
```

9.52 USER

Capabilities

USER

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the Windows user name of the person currently logged onto the computer.

Example

```
This document was distributed by user ##USER##
```

would result in the following string

```
This document was distributed by user Paul.Smith
```

9.53 VAR

Capabilities

VAR1 <custom variable data> to VAR50 <custom variable data>

☑Embedded ☑Data ☑Parse ☑Split

Description

There are 50 custom variable fields available which can contain any information that you require during a document distribution. These fields can be used to split up the document pages, build up subject titles, personalise email messages and be used as the key data to lookup information in other databases.

Notes

Variables are used extensively to 'pull in' data from the pages of a document such as invoice numbers, invoice values, overdue amounts etc. The variables are then used in areas such as email messages to create custom emails. For example:

Dear ##NAME##

Please find attached your invoice number ##VAR1## . The total value is ##VAR2##.

Many thanks,

Example

```
##VAR1 ABC001##
##VAR2 1285.95##
##VAR15 from Document Date##
```

9.54 YEARL

Capabilities

YEARL

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the current year in long hand format taking into account regional settings.

Example

```
##DAYN## ##MONTHL## ##YEARL##
```

would result in the following string

```
14 April 2008
```

Tip: You can use this command to build up archive directory structures, e.g. 'F:\Archives\Statements\##YEARL##-##MONTHL##\##VAR1##'

9.55 YEARS

Capabilities

YEARS

☐Embedded ☐Data ☑Parse ☐Split

Description

Inserts the current year in short hand format.

Example

```
##DAYN##-##MONTHN##-##YEARS##
```

would result in the following string

```
14-04-08
```

Tip: You can use this command to build up archive directory structures, e.g. 'F:\Archives\Statements\##YEARS##-##MONTHS##\##VAR1##'

9.56 BILLFNAME

Capabilities

##BILLFNAME <recipients first name>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies person's first name

Example

```
##BILLFNAME Tony##
```

9.57 BILLLNAME

Capabilities

##BILLLNAME <recipients last name>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies person's last name

Example

```
##BILLLNAME Aldred##
```

9.58 BILLADD1

Capabilities

##BILLADD1 <first line of billing address>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the first line of the address (street number)

Example

```
##BILLADD1 412 Sever Rd##
```

9.59 BILLADD2

Capabilities

##BILLADD2 <second line of billing address>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the second line of the address (apartment or suite number)

Example

```
##BILLADD2 Shop SP02##
```

9.60 BILLADD3

Capabilities

##BILLADD3 <third line of billing address>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the third line of the address

Example

```
##BILLADD3 Wythenshawe##
```

9.61 BILLCITY

Capabilities

##BILLCITY <city of billing address>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the billing city

Example

```
##BILLCITY Norcross##
```

9.62 BILLSTATE

Capabilities

##BILLSTATE <state of billing address>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the billing state

Example

```
##BILLSTATE GA##
```

9.63 BILLCOUNTY

Capabilities

##BILLCOUNTY <county of billing address>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the billing county

Example

```
##BILLCOUNTY Lancashire##
```

9.64 BILLZIP

Capabilities

##BILLZIP <zip code of billing address>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the billing zip code

Example

```
##BILLZIP 30092##
```

9.65 BILLPOSTCODE

Capabilities

##BILLPOSTCODE <post code of billing address>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the billing post code

Example

```
##BILLPOSTCODE M23 0FN##
```

9.66 BILLCOUNTRY

Capabilities

##BILLCOUNTRY <country of billing address>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the billing country

Example

```
##BILLCOUNTRY United States##
```

9.67 BILLEMAIL

Capabilities

##BILLEMAIL <email address of billing contact>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the billing person's email address

Example

```
##BILLEMAIL tony@aldredbuildersincsage.com##
```

9.68 BILLTEL

Capabilities

##BILLTEL <telephone number of billing contact>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the billing person's telephone number (including area code)

Example

```
##BILLTEL 777-055-0654##
```

9.69 BILLFAX

Capabilities

##BILLFAX <fax number of billing contact>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the billing person's FAX number (including area code)

Example

```
##BILLFAX 212-555-1234##
```

9.70 SHIPFNAME

Capabilities

##SHIPFNAME <shipping recipients first name>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the shipping persons first name

Example

```
##SHIPFNAME Tony##
```

9.71 SHIPLNAME

Capabilities

##SHIPLNAME <shipping recipients last name>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the shipping persons last name

Example

```
##SHIPLNAME Aldred##
```

9.72 SHIPADD1

Capabilities

##SHIPADD1 <first line of shipping address>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the shipping address line 1 (street number)

Example

```
##SHIPADD1 412 Sever Rd##
```

9.73 SHIPADD2

Capabilities

##SHIPADD2 <second line of shipping address>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the shipping address line 2 (apartment or suite number)

Example

```
##SHIPADD2 Shop SP02##
```

9.74 SHIPCITY

Capabilities

##SHIPCITY <city of shipping address>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the shipping address city

Example

```
##SHIPCITY Norcross##
```

9.75 SHIPSTATE

Capabilities

##SHIPSTATE <state of shipping address>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the shipping address state

Example

```
##SHIPSTATE GA##
```

9.76 SHIPZIP

Capabilities

##SHIPZIP <zip code of shipping address>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the shipping address zip code

Example

```
##SHIPZIP 30092##
```

9.77 SHIPCOUNTRY

Capabilities

##SHIPCOUNTRY <country of shipping address>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the shipping address country

Example

```
##SHIPCOUNTRY United States##
```

9.78 SHIPEMAIL

Capabilities

##SHIPEMAIL <email address of billing contact>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the shipping person's email address

Example

```
##SHIPEMAIL tony@aldredbuildersincsage.com##
```

9.79 SHIPTEL

Capabilities

##SHIPTEL <telephone number of shipping contact>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the shipping person's telephone number (including area code)

Example

```
##SHIPTEL 777-055-0654##
```

9.80 SHIPFAX

Capabilities

##SHIPFAX <fax number of shipping contact>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Specifies the shipping person's fax number (including area code)

Example

```
##SHIPFAX 212-555-1234##
```

9.81 TAXAMOUNT

Capabilities

##TAXAMOUNT <tax amount>##

✔Embedded ✔Data ✔Parse ✔Split

Description

Required if Level 2 is present

Tax amount applied to the transaction

Example

```
##TAXAMOUNT 77.50##
```

10 Troubleshooting

10.1 User log files

Each time a user performs an action within Spindle Document Distribution a log file is updated. The log files are replaced each time an action is performed, for example if a user distributes a statement run followed by an invoice run only one file 'processor' log file will exist. Log files can be quite large and therefore they are overwritten each time.

There is a log file for each type of action:

- Logging onto Spindle Document Distribution (UserUsageLog)*
- Printing a document (SpindleDocDistributionMonitor_Draycir)
- Distributing documents (SpindleDocDistributionProcessor_Draycir)
- Creating and updating forms (SpindleFormCreator_Draycir)
- Viewing a document in the Spindle Document Distribution viewer (SpindleDocDistributionViewer_Draycir)

All of the Spindle Document Distribution log files by default are stored in the users 'My Documents\My Draycir Logs' directory with the exception of the UserUsageLog log file which is a global log file. The UserUsageLog log file is stored in the Server files location of Spindle Document Distribution on the server.

You can change the location of the log files in User Settings > Options. (see page 189)

10.2 Error code 126

Problem

During the installation of the software a message box appears with the following error message:

```
Error code: 126
```

Issue

During the installation of the printer drivers the system needs to access a Windows system file called **framedyn.dll**. This error can occur because the file cannot be found and is usually due to the Windows Path environment variable being corrupt.

Solution

There are two ways to resolve this issue:

Solution 1: Verify system variables

1. Click **Start**, right-click **My Computer**, and then click **Properties** on the shortcut menu that appears. If you receive the following error message, click **OK**:

   rundll32.exe - Unable To Locate Component

   This application has failed to start because framedyn.dll was not found. Re-installing the application may fix this problem.

2. In the **System Properties** dialog box, click the **Advanced** tab.
3. Click **Environment Variables**.
4. Under **System variables**, click **Path**, and then click **Edit**. **Note:** If no **Path** variable is listed, click **New**. In the **Variable**

name box, type **Path**.

5. In the **Variable value** box, type the following:

%SystemRoot%\system32;%SystemRoot%;%SystemRoot%\System32\wbem

6. Click **OK** three times (each time that you have the option).

Solution 2: Copy the framedyn.dll file

1. Click **Start**, and then click **Run**.
2. In the **Open** box, type **%systemroot%\system32\wbem**, and then click **OK**.
3. Right-click **framedyn.dll**, and then click **Copy** on the shortcut menu that appears.
4. Click **Start**, and then click **Run**.
5. In the **Open** box, type **%systemroot%\system32**, and then click **OK**.
6. On the **Edit** menu, click **Paste**. If you are prompted to replace the existing file, click **Yes**.

10.3 Error backing up spldata.lgo

Problem

Your backup software reports that it failed to backup the file **'spldata.lgo'** or an error occurred on this file during the backup process.

Issue

Each computer that has the Spindle Document Distribution software installed, accesses the spldata.log file to confirm the location of the shared data folder where the database, settings and forms are located.

When accessing this file the software will lock particular sections of it. Since the file is being locked, the backup software is unable to read the contents and reports it as an error.

Solution

There are two possible solutions to this problem:

1. Ensure all computers which have Spindle Document Distribution installed are logged off before the backup is run.
2. Remove the file spldata.log from the backup. The file can easily be replaced if required and does not contain any important data that requires backing up.

11 Utilities

11.1 SharePoint Archive Integration Wizard

Microsoft SharePoint is a web-based collaboration and document management platform. In SharePoint you can create document libraries where you can upload your own documents. With each document you upload you can specify a set of information (meta-data) which is stored in columns. This information is used to index the document, allowing you to see the information quickly and making it easier to find in the future.

Document libraries can be used to store any number of types of documents, from letters, agreements, invoices, orders and more. Each document library can contain a number of different types of documents or can be specifically built to store just one type of document.

The SharePoint Wizard for Spindle Document Distribution automatically creates document libraries for a specific type of document and sets up the indexes (columns) to be used to find the document.

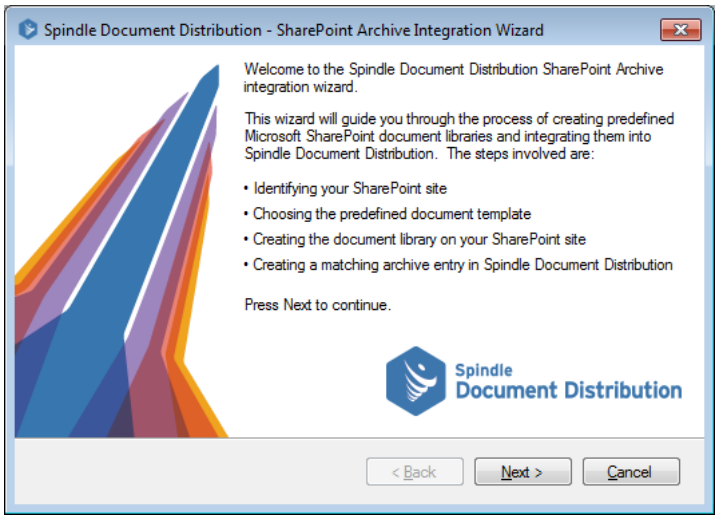
The Spindle Document Distribution SharePoint Archive Integration Wizard allows you to automatically create predefined document libraries for a specific type of document and sets up the columns to be used to index and find the documents. At the same time it will configure the Spindle Document Distribution Archive Manager to connect to, archive into and populate columns with relevant information taken from Spindle Document Distribution commands.

The following predefined document templates are included with Spindle Document Distribution:

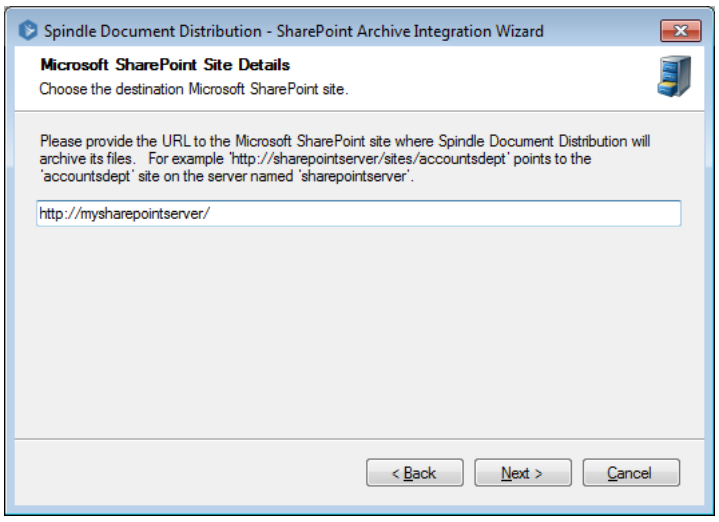
- Sales Invoices
- Sales Statements
- Sales Orders
- Sale Quotations
- Despatch Notes
- Purchase Orders
- Bills (Project Accounting)

Wizard instructions

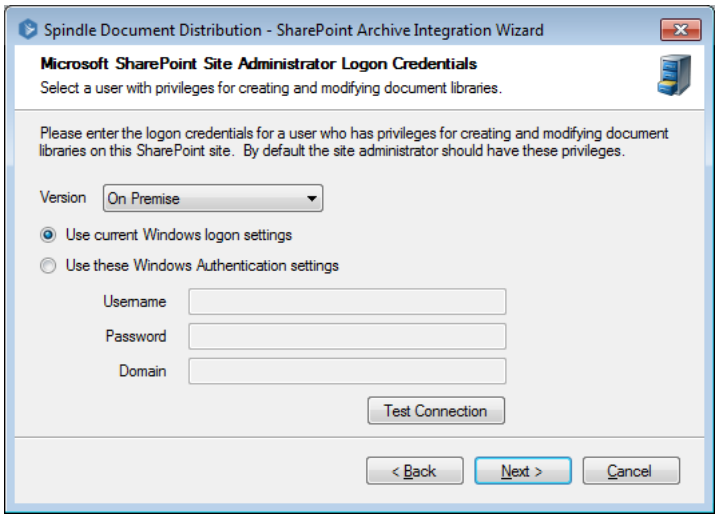
1. Before you run the wizard you will need the user name, domain name, and password of a user who has the rights to create document libraries on the Microsoft SharePoint site.
2. From the **Start Menu** run, 'All Programs -> Draycir -> Spindle Document Distribution -> Utilities -> **SharePoint Wizard for Spindle Document Distribution**'.



3. The welcome screen appears and briefly explains the steps involved. Click **Next**.



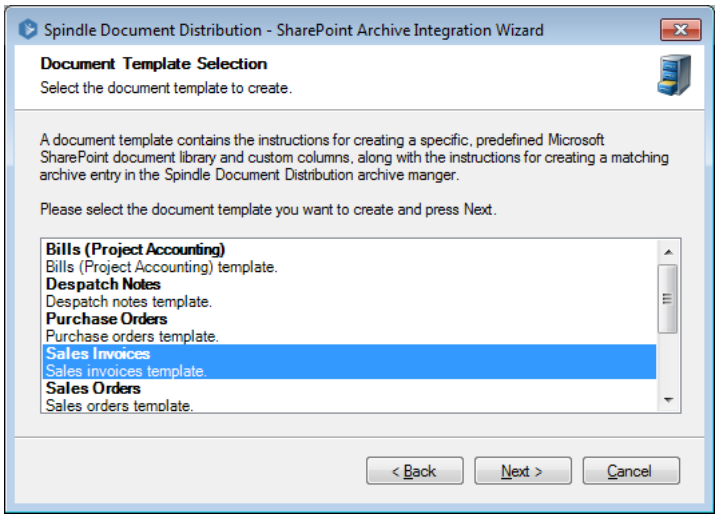
4. You are prompted for the URL (Uniform Resource Locators) of your Microsoft SharePoint site. This is the site the wizard will create the document library on. Remember to include the sub-site path in the URL if you want to create the document libraries on a SharePoint sub-site. If you have previously ran the wizard it will already contain the site you last used.
5. Enter your URL and click **Next**.



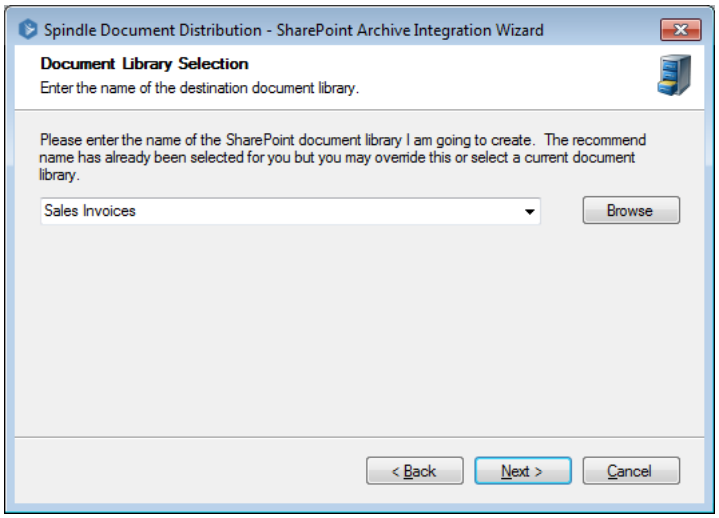
6. Select how the wizard will logon to the SharePoint site. If you select the Version as **On Premise:** If your current Windows user has the privileges for creating document libraries on this SharePoint site select **Use Windows Authentication**. If

your user does not have the privileges select **Use these Windows Authentication settings** and fill in the **Username, Password and Domain** of a user with these rights. If you select the Version as **Online:** you will need to provide the Username and Password credentials of the SharePoint user that you want to archive the documents under. This user must have the relevant permissions in SharePoint.

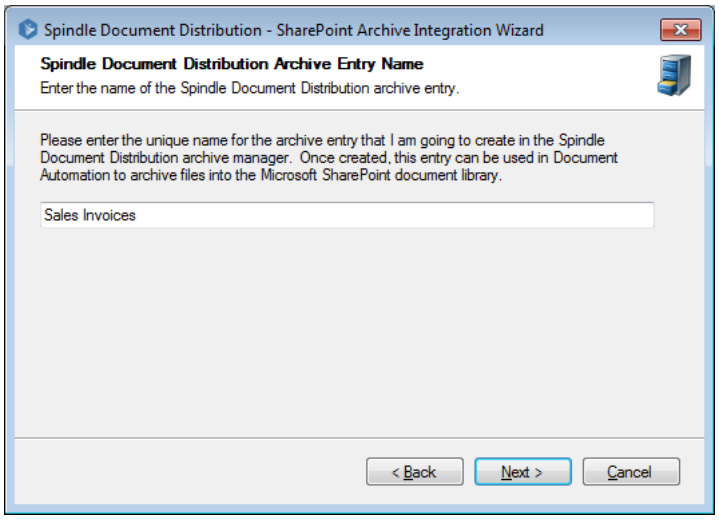
7. Click **Test Connection** to check if you can logon to the SharePoint site. **Note**: This function only tests if you can logon and does not check if you have the required privileges for creating document libraries.
8. Click **Next** to continue.



9. Each document template has contains a set of instructions for creating the document library, its columns, the archive manager entry and the links from the Spindle Document Distribution commands to the SharePoint columns.
10. Choose the document template you want to create and click **Next**.

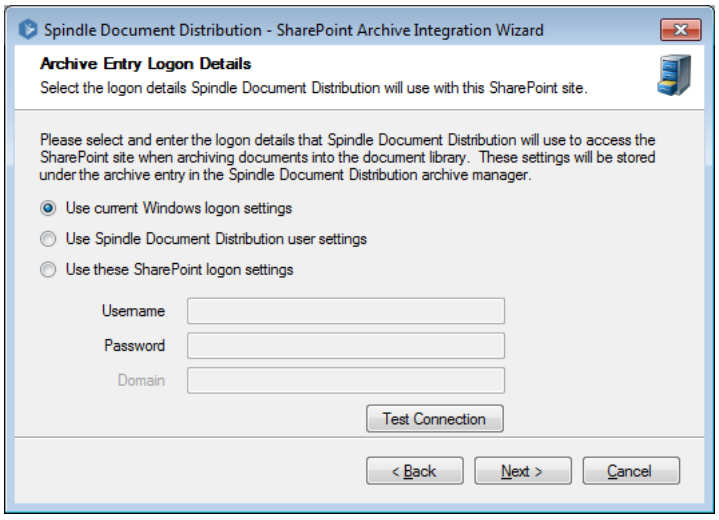


11. You are prompted to enter the name of the SharePoint library that is to be created. By default the wizard has entered the recommended name suggested by the document template. You may enter a new name or browse for an existing document library. If you chose an existing document library, the wizard will only create any columns specified by the document template that do not already exist in the document library.
12. Click **Next** to continue.



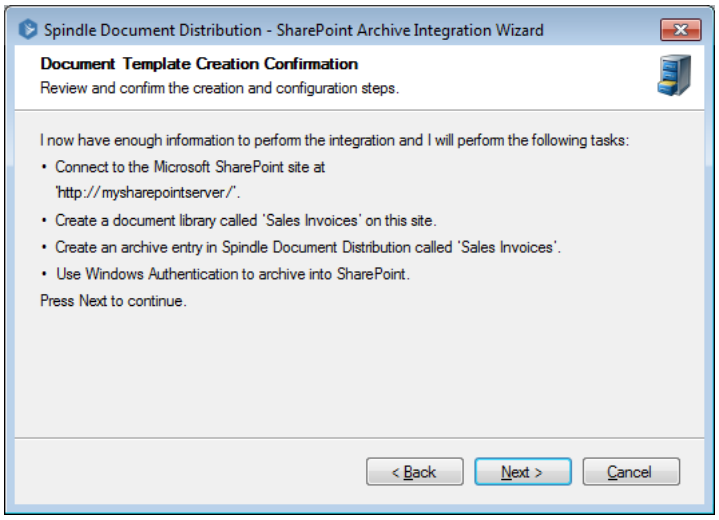
13. Now you need to enter the name of the archive entry that will be created in the Spindle Document Distribution Archive Manager. Once again the wizard has entered the recommended name as suggested by the document template. If this archive entry already exists you will either need to delete it using the Spindle Document Distribution Tools or choose another name. The wizard will store the URL connection and logon information in the archive entry and will create the column/command associations.

14. When you have entered the name click **Next** to continue.

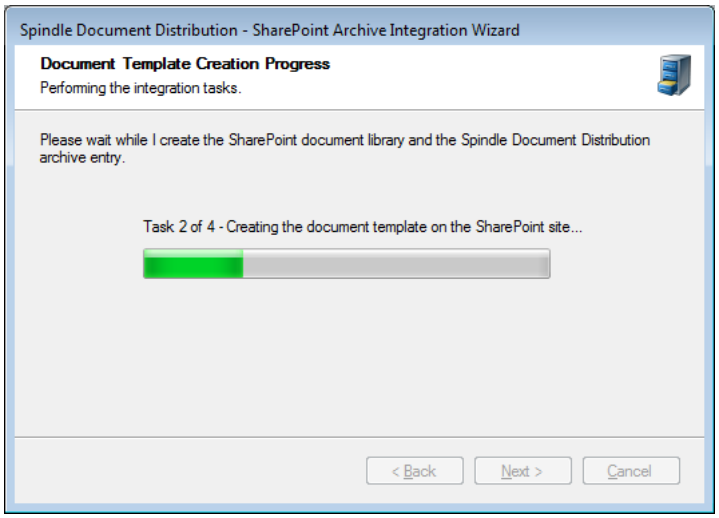


15. Select how Spindle Document Distribution will logon to the SharePoint site when it will archive a document. These settings are different from the logon details you provided earlier in the wizard as this information is stored in the Spindle Document Distribution database and used when you actually archive a document. Select **Use current Windows logon settings** to use the Windows logon credentials of the user performing the archive operation. This means the logon credentials will be different for every user so you must ensure that each user using Spindle Document Distribution has the rights to upload documents to the SharePoint site. Select **Use Spindle Document Distribution user settings** to use the logon credentials each user can specify when configuring the SharePoint archive device in Spindle Document Distribution Tools. See Device Manager (see page 153) for more information. To always use a specific user select **Use these SharePoint logon settings** and enter the required details.

16. Click **Next** to continue.

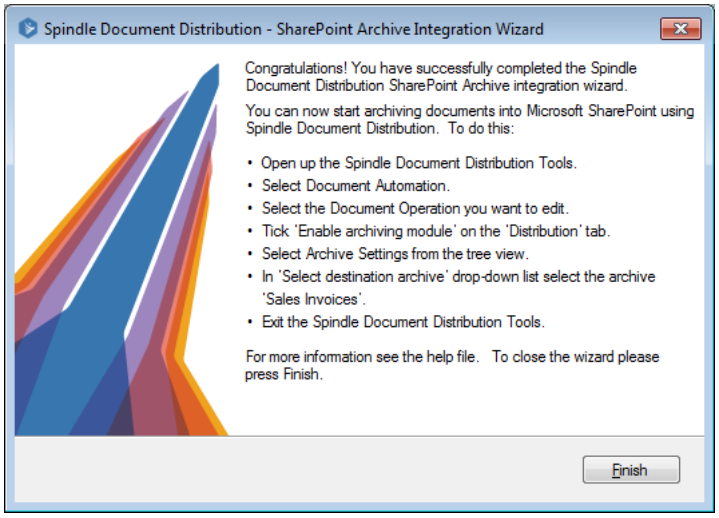


17. The wizard has now gathered enough information to start the creation process. Please review the details and click **Next**.



18. The final step of the wizard is to perform the actual

tasks. This can take a few minutes to perform so please be patient while each step is executed.



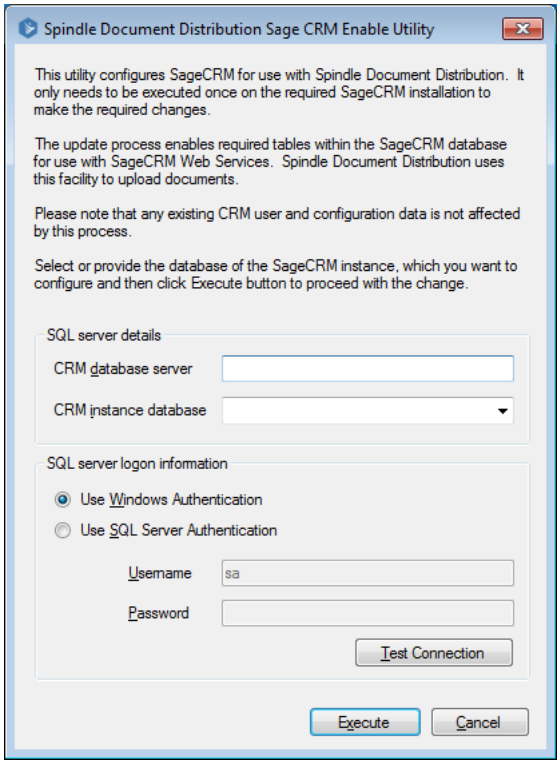
19. The Spindle Document Distribution SharePoint Archive Integration Wizard has completed. Click Finish and you can now start using the archive entry created in the Archive Manager, in your document operations. Please see Document Automation - Archive Settings (see page 89) for information on using this archive.

11.2 Sage CRM Enable Utility

Spindle Document Distribution communicates with SageCRM through the web services provided by the SageCRM API. However, sometimes SageCRM does not expose all of the data to its own web services that Spindle Document Distribution requires. This utility allows you to update your SageCRM and gain access to this data.

SageCRM Enable Utility instructions

1. From the **Start Menu** run, 'All Programs -> Draycir -> Spindle Document Distribution -> Utilities -> **Sage 200 CRM Web Services Utility**'.
2. This will open up a Windows Explorer window listing the application file **SpindleDocDistributionSageCRMUtil.exe**.
3. Copy this file to the same server where the SageCRM web service is installed.
4. Log on to the server and run this application.
5. When the dialog box appears (see below) enter the name of the SQL server hosting the SageCRM database in **CRM database server**.
6. From the drop-down list select the **CRM instance database** you want to update or type the name in directly.
7. Select and enter the logon information required for the SQL server.
8. Press **Execute** to perform the update.
9. You can now start uploading documents to SageCRM from Spindle Document Distribution.



Spindle Document Distribution SageCRM Enable Utility dialog

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