
Minisoft® eDIRECT PLUS™

Version 10.0

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2. MINISOFT warrants that it has the right to grant the licenses contained in this Agreement.
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4. MINISOFT, Inc. warrants the media upon which this Product is recorded to be free from defects in materials and workmanship under normal use for a period of 90 days from the date of purchase. During the warranty period MINISOFT will replace media that prove to be defective. Customer's exclusive remedy for any media that proves to be defective shall be to return the media to MINISOFT for replacement.
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3. No Assignment by Customer. This Agreement shall be binding upon and inure to the benefit of MINISOFT and any successors and assigns. Customer shall have no right to assign or otherwise transfer its rights or obligations under this Agreement except with the prior written consent of MINISOFT, which MINISOFT in its sole discretion and for any reason or no reason provide or withhold.

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5. Severability. In the event that any one or more provisions of this Agreement is found by a court of competent jurisdiction to be unenforceable or invalid, then notwithstanding any such finding the remainder of this Agreement shall remain in full force and effect, and such provision that is found to be unenforceable or invalid shall be deemed severed.

6. Waiver. Neither party's right to require performance of the other party's obligations hereunder shall be affected by any previous waiver, forbearance, or course of dealing, nor shall any waiver or forbearance or other course of dealing at any time with respect to any term or condition in this Agreement be effective unless evidenced in writing signed by the waiving party as to such waiver, forbearance or other course of dealing. No waiver or modification of this Agreement or any covenant, condition or limitation herein contained shall be valid and no evidence of waiver or modification shall be offered or received in evidence in any proceeding, arbitration or litigation between the parties hereto arising out of or affecting this Agreement or the rights or obligations of the parties hereunder, unless such waiver or modification is in writing duly signed by both parties.

7. Headings, Sections - The various headings in this Agreement are inserted for convenience only and shall not affect the meaning or interpretation of this Agreement or any Section or provision hereof.

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eDIRECT

Introduction to eDIRECT

eDIRECT is a processing module of eFORMz that allows you to output your merged reports to multiple destinations or output types simultaneously, including:

- ◆ Print (Print File)
- ◆ E-Mail
- ◆ Fax
- ◆ HTML Email output (eDIRECT PLUS)
- ◆ Database (eDIRECT PLUS)
- ◆ Archive (eDIRECT PLUS)
- ◆ SMS (eDIRECT PLUS)

NOTE: In the Demo version of eFORMz, eDIRECT PLUS is automatically enabled. However, once the product is licensed, the eDIRECT PLUS tab will only display if it has been purchased.

Each output type is symbolized by one of the following icons:



Print (Print File)

Output is directed to a printer or as a file to a specified directory. Print file output types include pdf, efd, pcl, text, and html.



E-Mail

Output is directed to an email server with the ability to attach pdf, efd, pcl, text, or html file output.



Fax

Output is directed to a fax server which faxes your output to the specified fax number.

eFORMz will automatically create a Print File, E-Mail or Fax destination folder in the base directory that the process is executed from for user manageability.

Each output type can contain single or multiple conditions:



Conditions

Defines a condition.

Each output type has multiple elements that are defined with the following symbols:



Print Element

Element that signifies output to a specific printer device.



Generated Element

Element that contains generated content. The type of content is shown after the element name.



Constant Element

Element that has a constant value. The type of content is shown after the element name.



Attachment Element

Element that signifies an attachment. The type of content being attached is shown below the element name.



Database Lookup Element

Element that reads from a database. The method used to lookup the element in the database is shown after the element name.

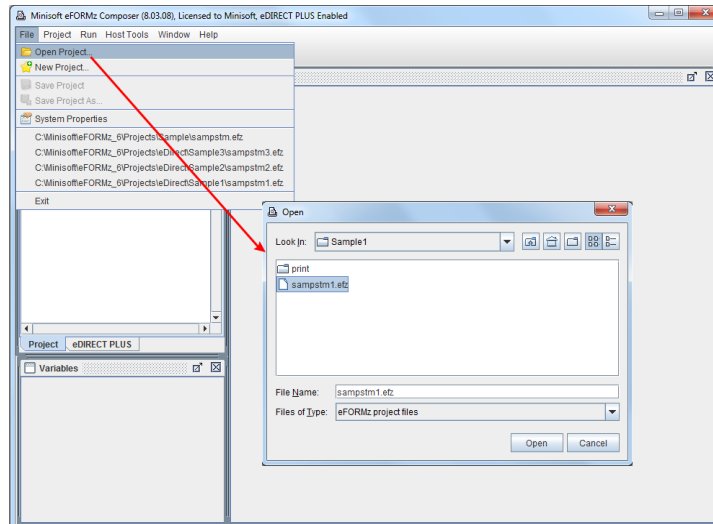
Quick Start

E-Mail

The following example will familiarize you with eDIRECT and demonstrate how to easily send merged output to a specified e-mail address using eDIRECT.

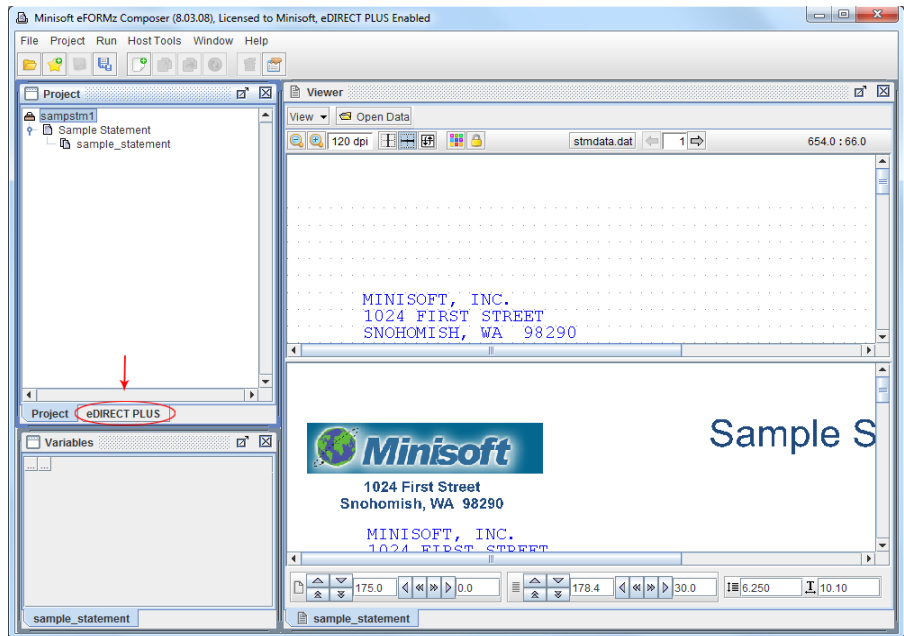
Once eFORMz has been installed on your PC start the eFORMz Composer:

1. From your Start Menu select *Programs > eFORMz 9 > eFORMz Composer*.
2. The eFORMz Composer window will display.
3. From the File Menu select *File > Open Project*.
4. Open the sampstm1.efz project file located in the *C:\Minisoft\efORMz_6\Projects\eDirect\Sample1* folder:



5. The sampstm1.efz project will appear in the Form and Data Viewer.

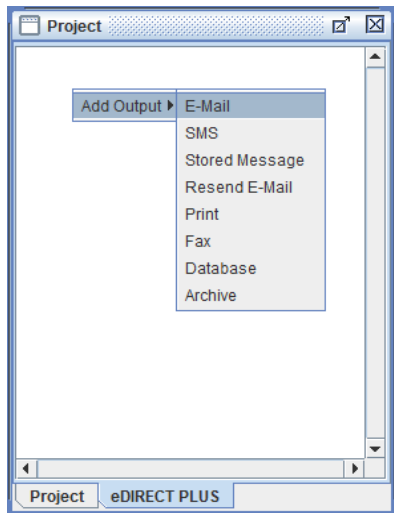
- Switch to the eDIRECT (or eDIRECT PLUS) tab.



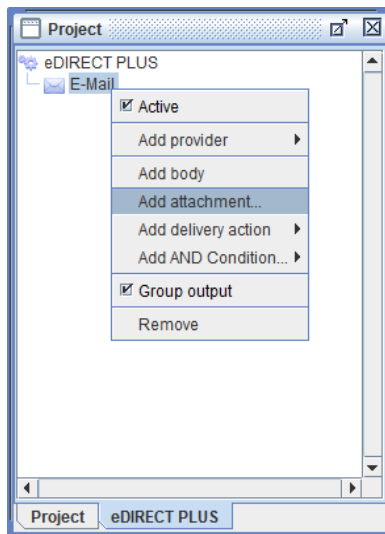
Configuring the E-Mail Output Destination

For our quick start example we will be sending all merged output as an email with a PDF file attachment.

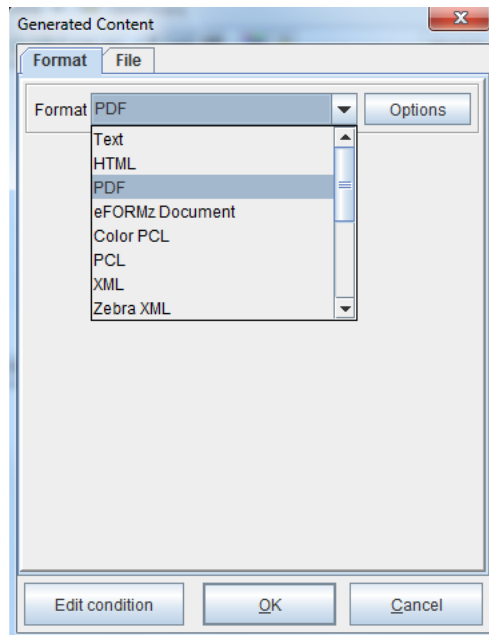
1. *Right click* in the Project window, highlight *Add Output* and select *E-Mail*.



2. *Right click* the *E-Mail* icon and choose the *Add attachment* option.



3. Select *PDF* from the *Format* drop-down menu.



Options available:

Text

Attachment will be in text file format.

HTML

Attachment will be in HTML format.

PDF

Attachment will be in PDF format.

eFORMz Document

Attachment will be in an eFORMz Document format.

Color PCL

Attachment will be in PCL file format (color).

PCL

Attachment will be in PCL file format (B/W).

XML

Attachment will be in XML format.

Zebra XML

Attachment will be in Zebra XML format.

TIFF

Attachment will be in TIFF format.

PNG

Attachment will be in PNG format.

JPEG

Attachment will be in JPEG format.

GIF

Attachment will be in GIF format.

BMP

Attachment will be in BMP format.

AFP

Attachment will be in AFP format.

Postscript

Attachment will be in Postscript format.

ZPLII

Attachment will be in ZPL format.

NONE

No attachment will be included in the email.

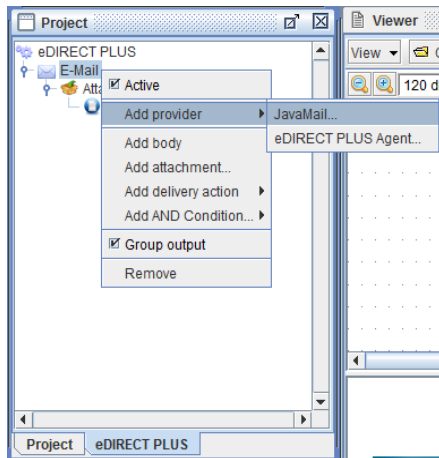
4. Switch to the File tab. Enter a value in the *File name* field or select a *Variable*.

The screenshot shows a dialog box titled "Generated Content" with a close button (X) in the top right corner. The dialog has two tabs: "Format" and "File". The "File" tab is selected. The "File" tab contains the following fields and options:

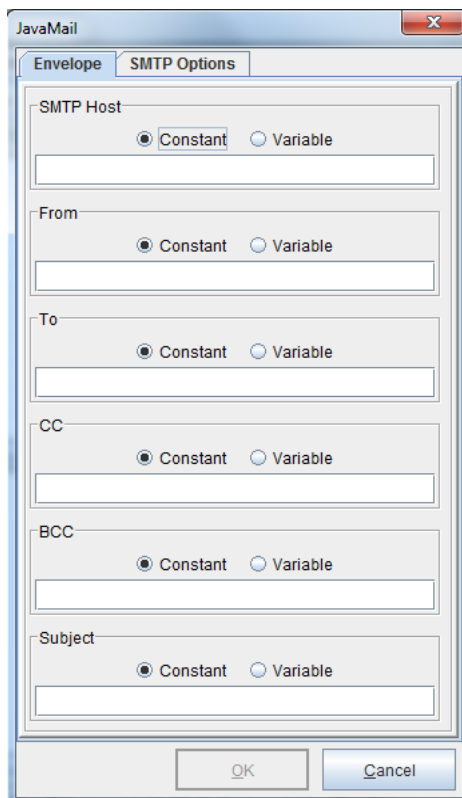
- File name:** A section with two radio buttons: "Constant" (selected) and "Variable". Below them is a text input field containing the text "Statements".
- Create unique file name:** A checkbox that is currently unchecked.
- Header:** A section with two radio buttons: "Constant" (selected) and "Variable". Below them is an empty text input field.
- Setup:** A section with two radio buttons: "Constant" (selected) and "Variable". Below them is an empty text input field.
- Trailer:** A section with two radio buttons: "Constant" (selected) and "Variable". Below them is an empty text input field.

At the bottom of the dialog, there are three buttons: "Edit condition", "OK", and "Cancel".

5. Right click the E-Mail and select Add provider > JavaMail.



6. The Envelope tab of the JavaMail dialog box will display.



Element Options:

SMTP Host

IP address or name of the email server that will be used to send the generated emails. By default this is a constant element. Port # can be included by adding a colon (hosting.companyname.com:2525) as the separator.

From

An email address that designates who the email is from. By default this is a constant element.

To

An email address that designates the recipient of the email. This can be a constant, bound, or database tag reference.

TIP: Multiple email addresses can be separated by a semicolon (;), making sure a space separates the semicolon and the following email address. For example:

JohnDoe@minisoft.com; JaneDoe@minisoft.com

CC

An email address for CC recipients. Multiple email addresses can be separated by a semicolon (;).

BCC

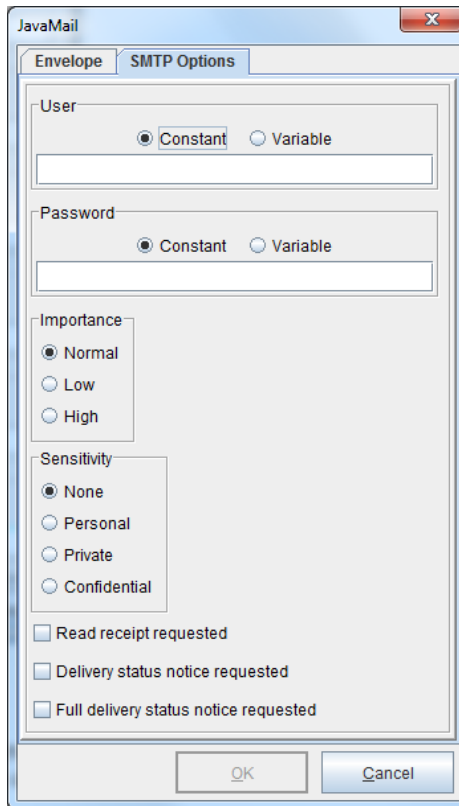
An email address for BCC recipients. Multiple email addresses can be separated by a semicolon (;).

Subject

The subject of the email. By default this is a constant element.

SMTP Options

For SMTP host authentication.



The screenshot shows the JavaMail SMTP Options dialog box. It has two tabs: 'Envelope' and 'SMTP Options', with 'SMTP Options' selected. The dialog is divided into several sections:

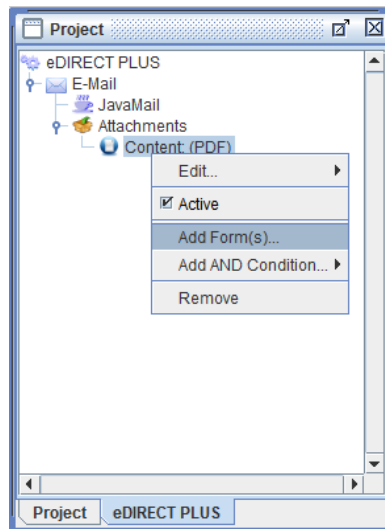
- User:** A section with two radio buttons: 'Constant' (selected) and 'Variable'. Below is a text input field.
- Password:** A section with two radio buttons: 'Constant' (selected) and 'Variable'. Below is a text input field.
- Importance:** A section with three radio buttons: 'Normal' (selected), 'Low', and 'High'.
- Sensitivity:** A section with four radio buttons: 'None' (selected), 'Personal', 'Private', and 'Confidential'.
- Checkboxes:** Three unchecked checkboxes: 'Read receipt requested', 'Delivery status notice requested', and 'Full delivery status notice requested'.

At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

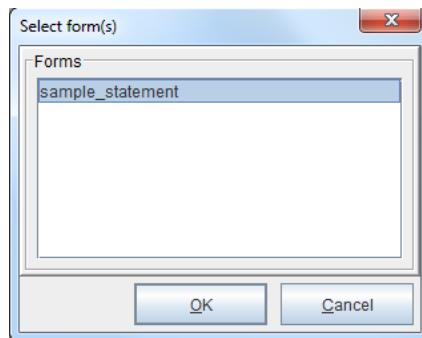
NOTE: If real client and user email information is used, they will receive an email when the eDIRECT process is run. We suggest using your own email server and email address for testing purposes only.

7. When complete click OK.

8. Right click the *Content: (PDF)* element and select *Add Form(s)*.

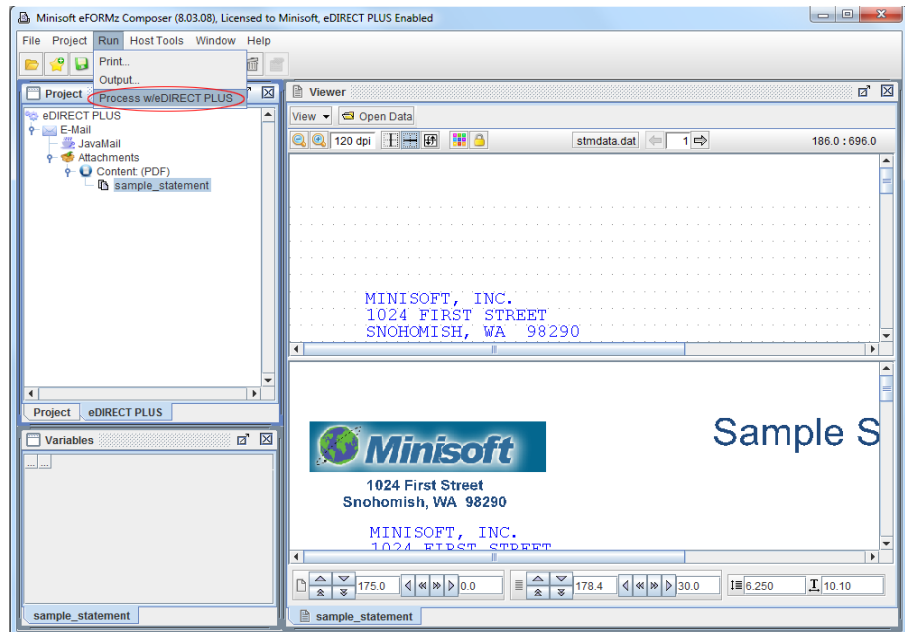


9. Choose the form that will be sent as a PDF attachment.



Run the eDIRECT Process

1. From the eFORMz Main Menu, select *Run > Process w/eDIRECT*.



2. Check your email account.

Fax

In this quick start example, we will be using eDIRECT to output all merged data and forms to a particular fax number. To send all merged output to a fax machine you will need a fax server. After setting up the fax server, note the configured header information, for example:

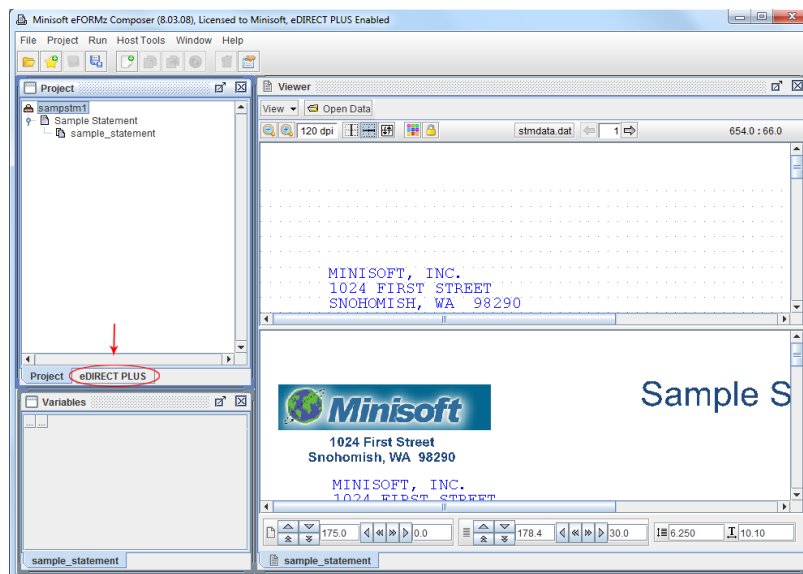
@@Number 123-456-7890@@

123-456-7890 is the number of the fax machine you would like to send your output to.

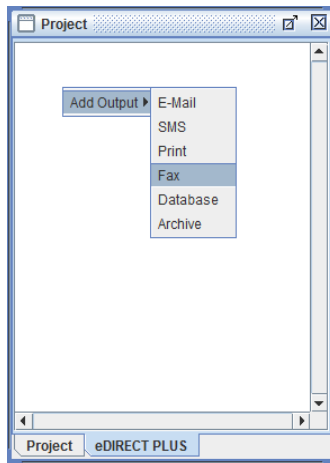
Note: Header information may vary between different fax servers.

The header information will be outputted by eDIRECT and directed to the fax server which will process the header information to send the merged output to the correct fax machine. To specify the header information in eDIRECT, follow these instructions:

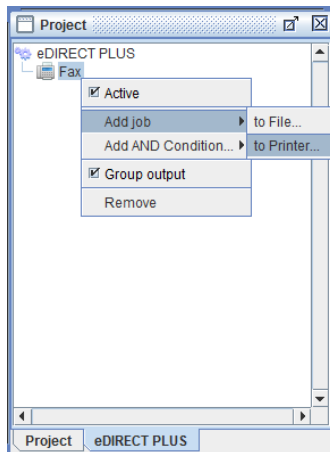
1. From the eFORMz Composer window select the *File* menu > *Open Project*.
2. Open the sampstm1.efz project file located in the C:\Minisoft\efORMz_6\Projects\ eDirect\Sample1 folder.
3. The sampstm1.efz project file appears in the Form and Data Viewer. Switch to the eDIRECT (or eDIRECT PLUS) tab.



4. Right click in the Project window, highlight *Add Output* and select *Fax*.



5. Right click the *Fax* output destination and select *Add job > to Printer*.



Job Options:

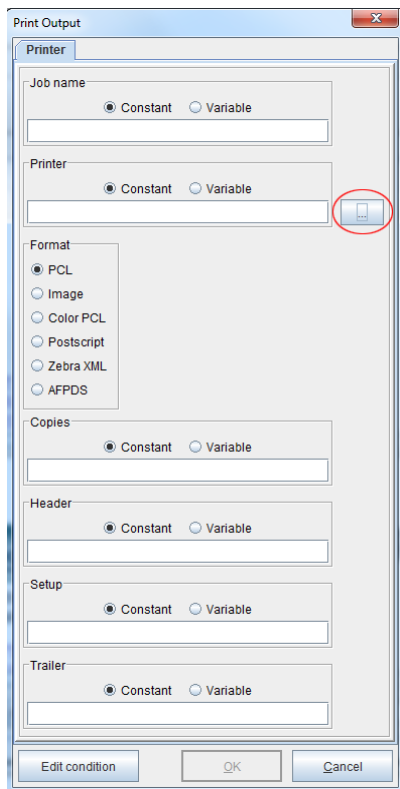
to File

Acts as an input directory, putting all of the output files in a directory that is monitored by the fax server and then sent to the specified fax number accordingly. For more information, go to the *Directing Output to a Fax Server* section.

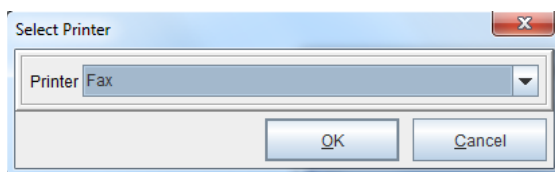
to Printer

Sends the output to the printer queue monitored by your fax server.

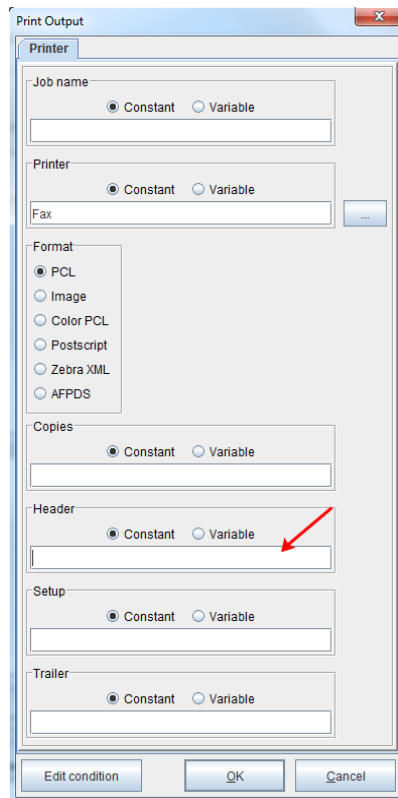
- The Print Output dialog box will display. To define the printer queue monitored by your fax server, select the browse button from the *Printer* field.



- Choose the *Fax* option.



8. Enter the fax server header information in the *Header* field.



The screenshot shows the 'Print Output' dialog box with the 'Printer' tab selected. The dialog contains several sections for configuring print settings:

- Job name:** Radio buttons for 'Constant' (selected) and 'Variable', followed by a text input field.
- Printer:** Radio buttons for 'Constant' (selected) and 'Variable', followed by a text input field containing 'Fax' and a browse button (...).
- Format:** Radio buttons for 'PCL' (selected), 'Image', 'Color PCL', 'Postscript', 'Zebra XML', and 'AFPDS'.
- Copies:** Radio buttons for 'Constant' (selected) and 'Variable', followed by a text input field.
- Header:** Radio buttons for 'Constant' (selected) and 'Variable', followed by a text input field. A red arrow points to this field.
- Setup:** Radio buttons for 'Constant' (selected) and 'Variable', followed by a text input field.
- Trailer:** Radio buttons for 'Constant' (selected) and 'Variable', followed by a text input field.

At the bottom of the dialog are three buttons: 'Edit condition', 'OK', and 'Cancel'.

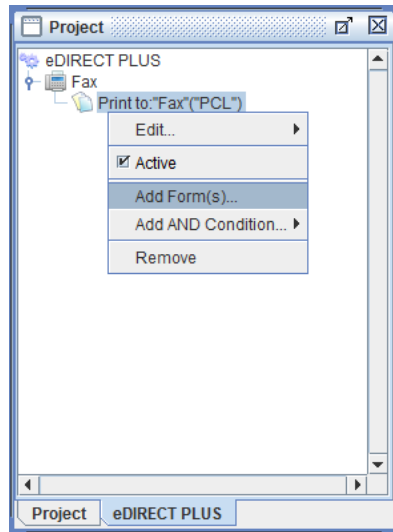
For example:

@@Number 123-456-7890@@

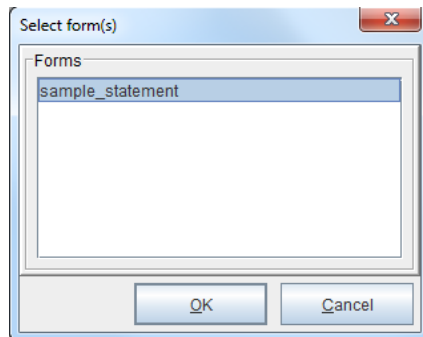
Note: Header information may vary between different fax servers.

9. Click *OK*.

10. Right click the *Print to:* element of the *Fax* output destination and select *Add Form(s)*.

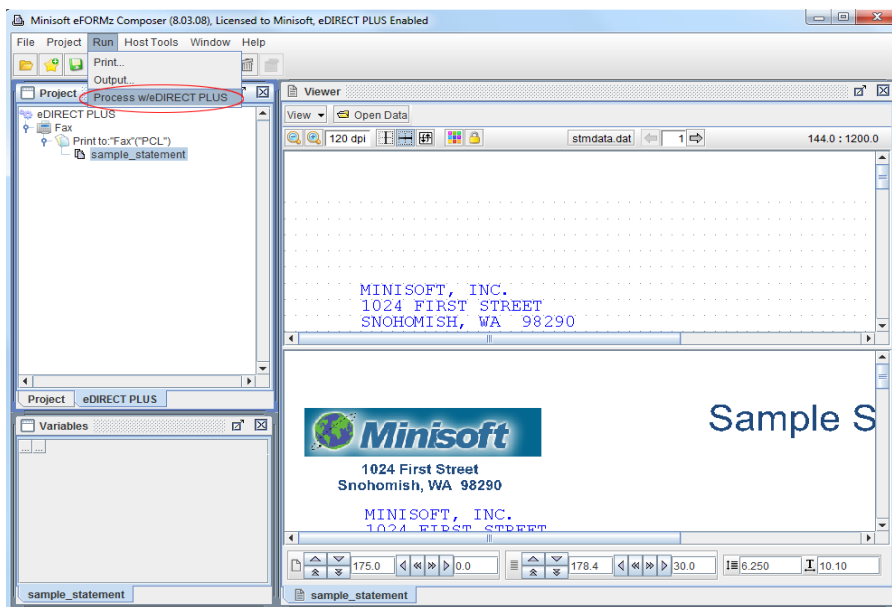


11. Choose the form and click OK.



Run the eDIRECT Process

1. From the eFORMz Composer select *Run > Process w/eDIRECT*:



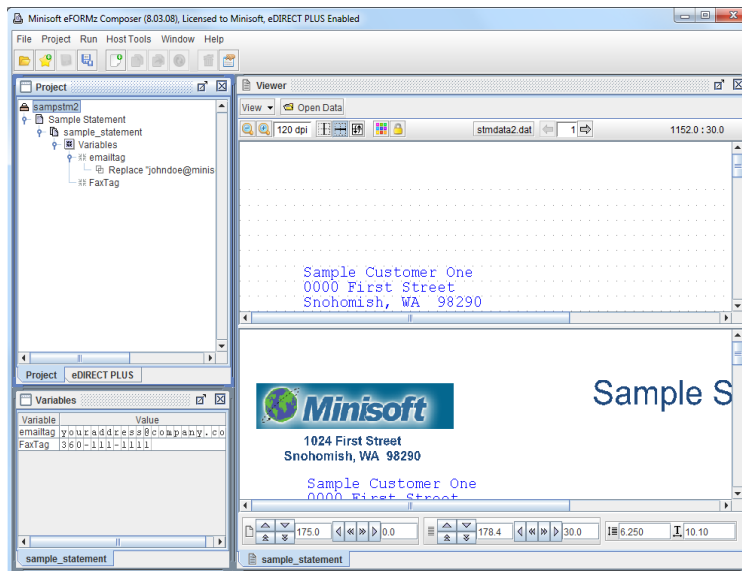
2. To redirect Fax output to a specific folder or fax queue, see *Chapter 9: Print Automation > Local Toolkit*.

Variable Reference

E-Mail

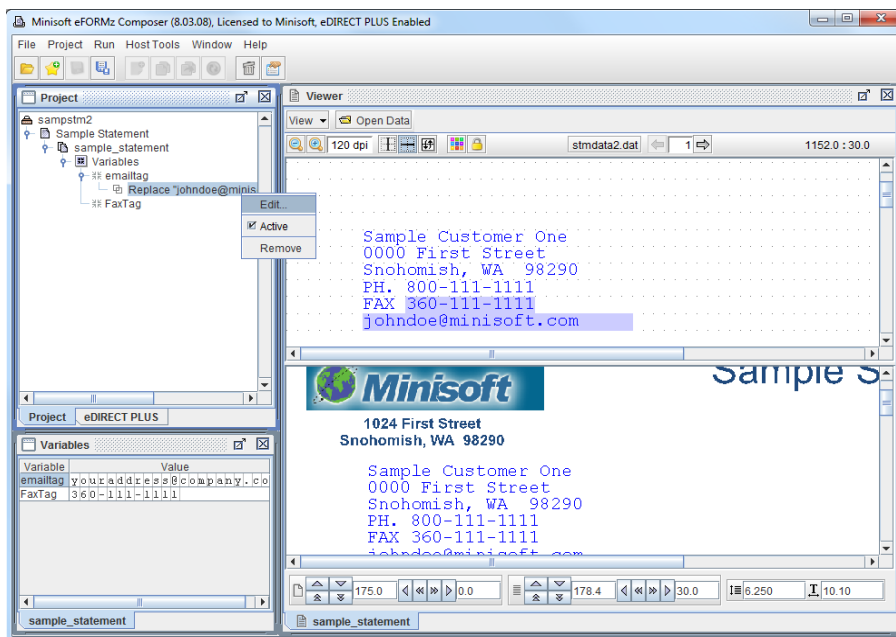
The following example will demonstrate how to take a tagged email address from the original data file and using eDIRECT distribute the email to the specified recipients:

1. Start the eFORMz Composer.
2. From the File menu select *File > Open Project*.
3. The Open dialog box appears. Select the *sampstm2.efz* project file from the C:\Minisoft\efORMz_6\Projects\eDirect\Sample2\ directory.
4. Another dialog box will appear allowing you to select the associated data file (stmdata2.dat).
5. The *sampstm2.efz* project file displays.

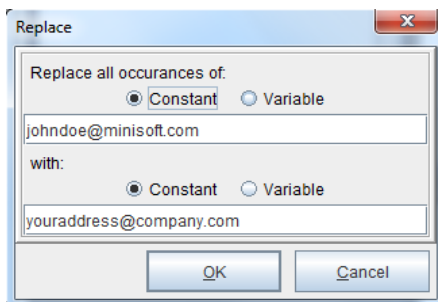


6. From the Project window select the *Replace* function located under the *emailtag* variable.

7. Using your mouse, *right click* and select *Edit*.



8. From the Replace dialog box enter your email address with the one indicated in the Constant field ("youraddress@companyname.com"):



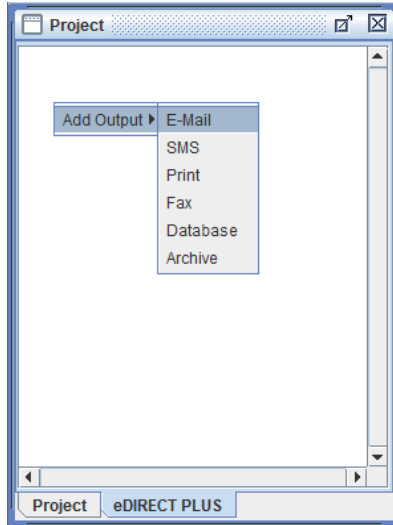
Once complete click *OK*. Your email address will appear in the Form and Data Viewer.

9. From the Project window, switch to the eDIRECT (or eDIRECT PLUS) tab.

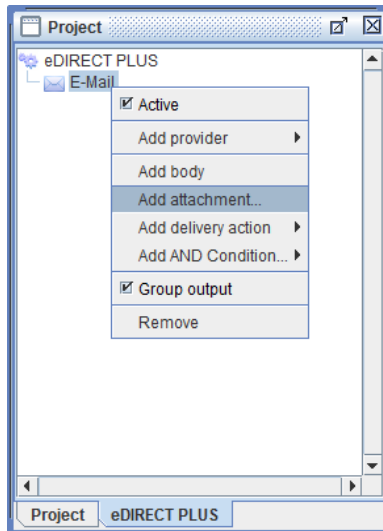
Configuring the Output Destination

In the following example, all merged output will be sent as an email attachment to the specified email address contained in the data file. If a page does not contain an email address, as do pages 3 and 4, eDIRECT will simply skip these pages for emailing and create a PDF file for later use.

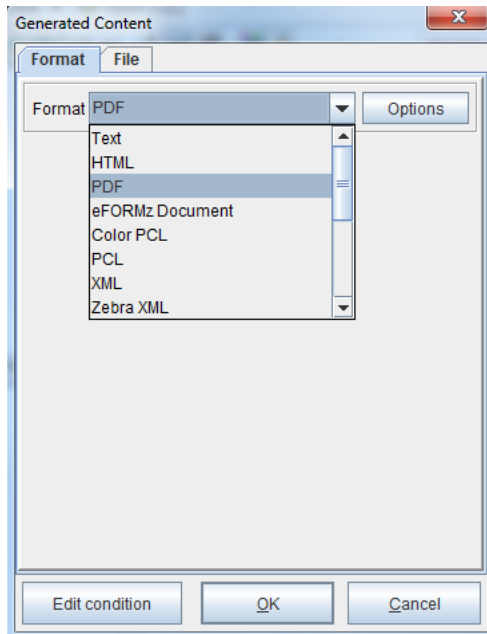
1. *Right click* in the Project window and select *Add Output > E-Mail*.



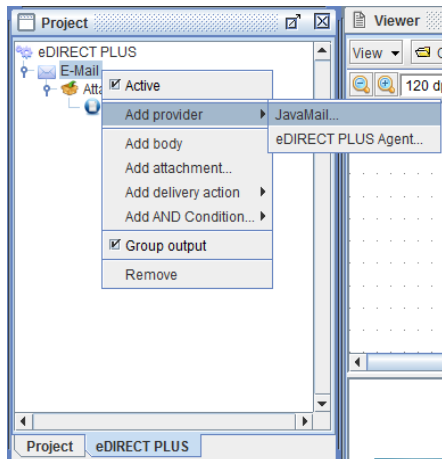
2. *Right click* the *E-Mail* icon and choose the *Add attachment* option.



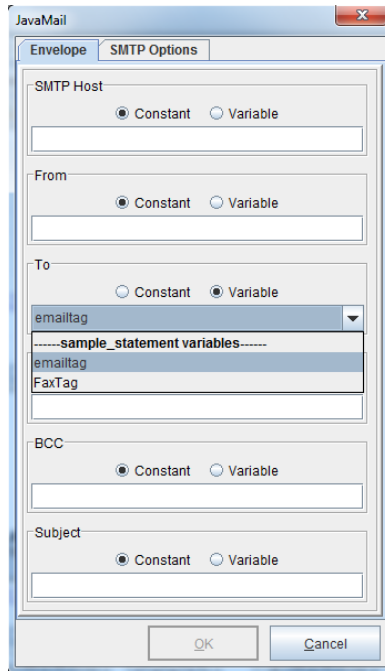
3. Select *PDF* from the *Format* drop-down menu.



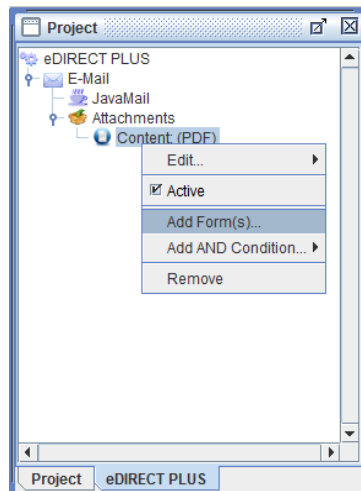
4. Right click the *E-Mail* and select *Add provider > JavaMail*.



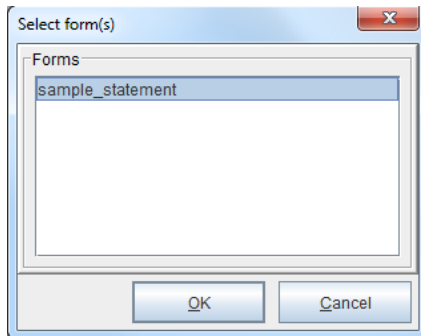
5. The Envelope tab of the JavaMail dialog box will display. In the *To* field, select the *Variable* radio button and pick the *emailtag* variable from the drop-down menu.



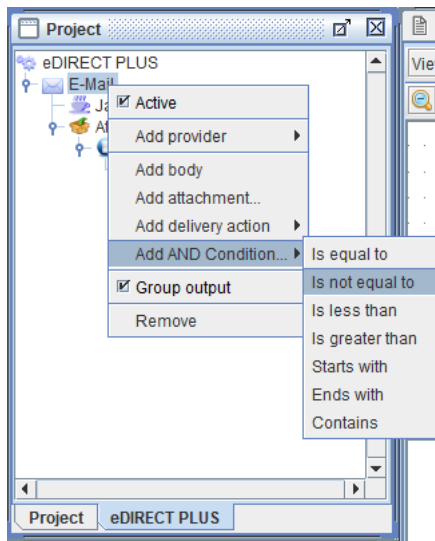
6. Configure your email server IP address, sender (From), subject, and body. If CC and BCC are needed configure these also. Click *OK*.
7. *Right click* the *Content: (PDF)* element and select *Add Form(s)*.



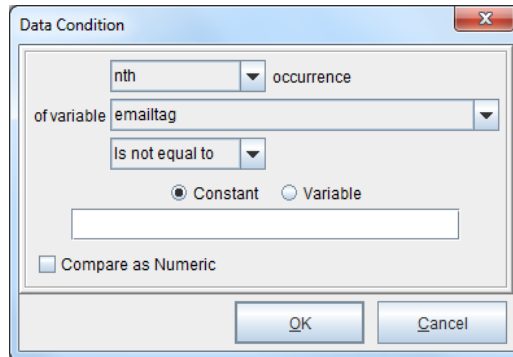
8. Select the form to be sent as a PDF attachment.



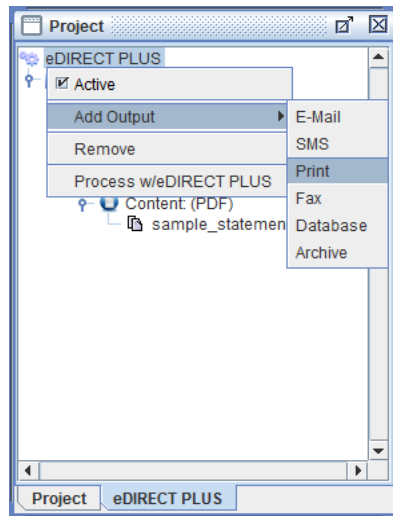
9. To ensure that only the output with an email address is sent as an attachment, *right click E-Mail* and select *Add AND Condition > Is not equal to*.



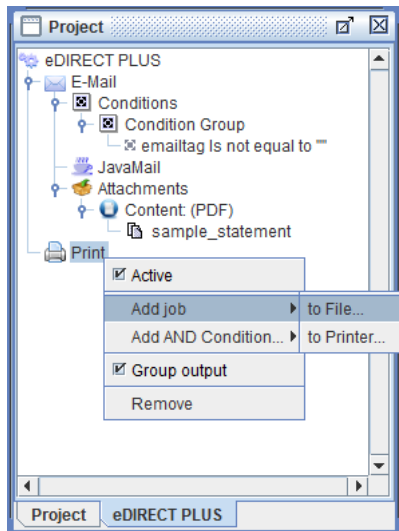
10. Select 'nth' occurrence of variable *emailtag* is not equal to an empty value. If the *emailtag* variable has no email address value, then an email attachment will not be sent. If the email address is contained in the data file, an email will be sent as an attached PDF file. Click OK.



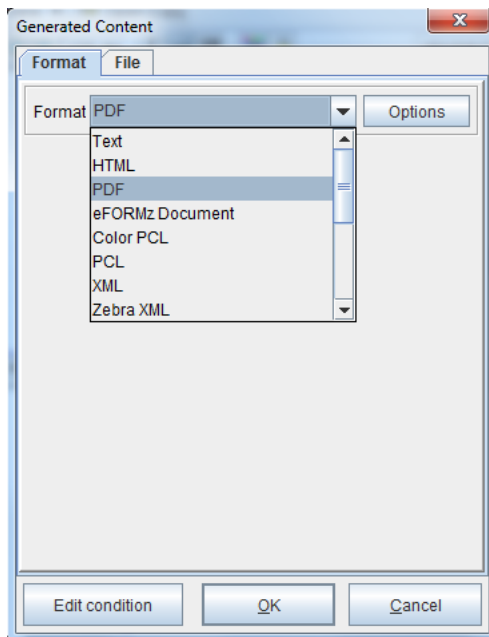
11. Add a print file process to create PDF files of pages that do not contain an email address. *Right click* in the Project window and select *Add Output > Print*.



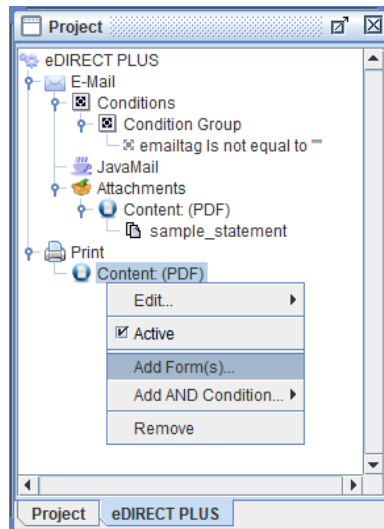
12. Right click the *Print* icon and select *Add job > to File*.



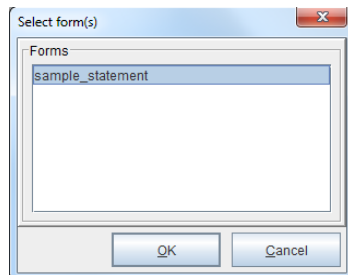
13. From the *Format* list, select *PDF*.



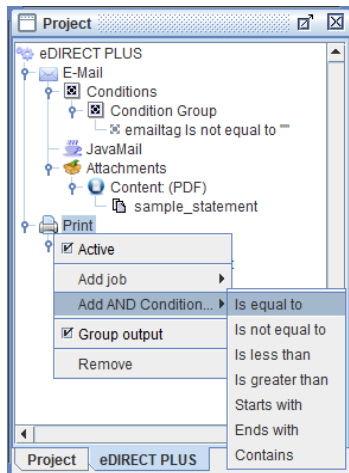
14. Right click the *Content: (PDF)* and choose the *Add Form(s)* option.



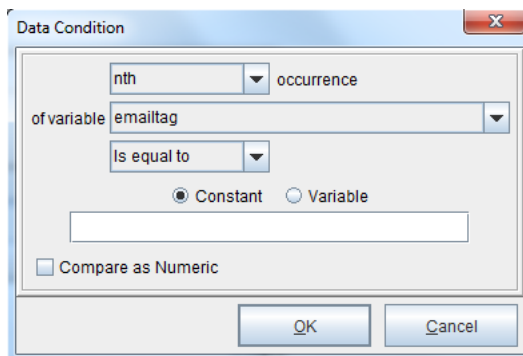
15. Pick the form and click OK.



16. Right click *Print* and select *Add AND Condition > Is equal to*.

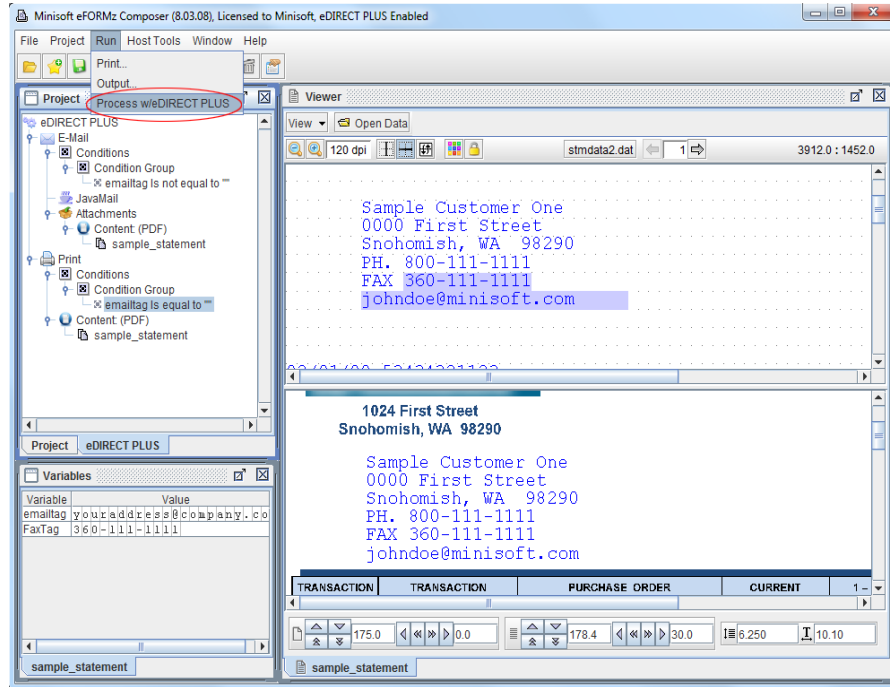


17. Select 'nth' occurrence of variable *emailtag* is equal to an empty value. If the *emailtag* variable has no email address value, then a PDF file will be generated. Click OK.



Run the eDIRECT Process

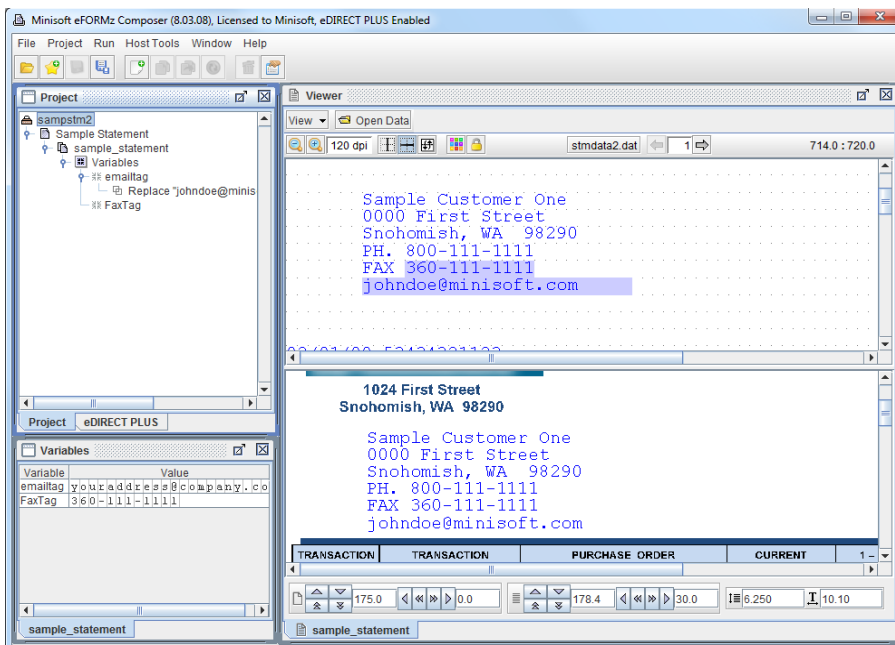
1. From the eFORMz Composer select *Run > Process w/eDIRECT*.



Fax

The following example will demonstrate how to take a tagged fax number from a data file and using eDIRECT, direct the merged output to a fax server:

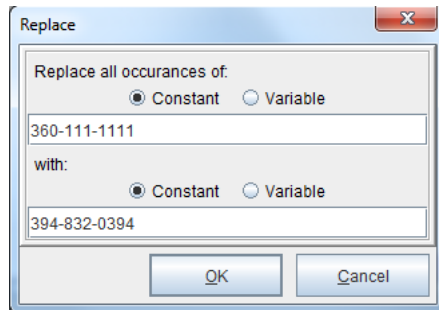
1. From the eFORMz Composer select the *File* menu > *Open Project*.
2. The Open dialog box appears. Select the sampstm2.efz project file from the C:\Minisoft\efORMz_6\Projects\eDirect\Sample2\ directory.
3. If a data file has not already been selected the Data File dialog box will display. Select the data file pertaining to the project file, in this case *stmdata2.dat*.
4. The sampstm2.efz project file will display in the Project window.



5. A variable tag has been added to the project file tagging the fax number. To change the fax number, *right click FaxTag* and select *Add Function > Replace*.

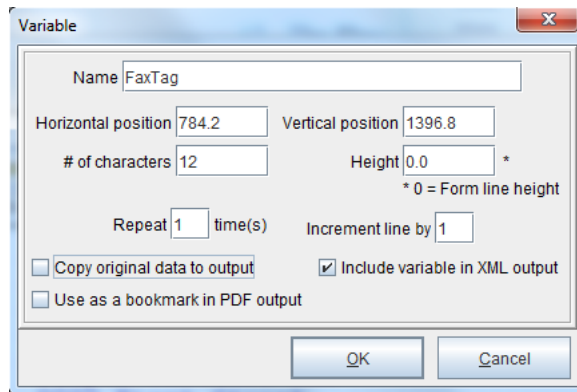
- The Replace dialog box displays. In the *Replace all occurrence of* > *Constant* field enter the fax number displayed in the data file (360-111-1111).

Enter the number you would like to replace the existing fax number with (*with:* > *constant* field).



Once complete click *OK*.

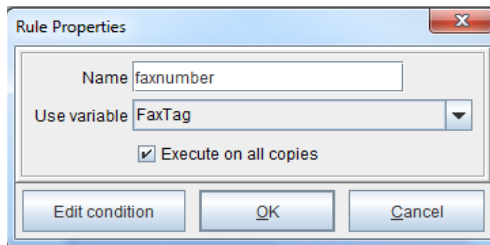
- From the Project window, *right click FaxTag* and select *Edit*.
- The Variable dialog box displays. Uncheck *Copy original data to output*.



Once complete, click *OK*.

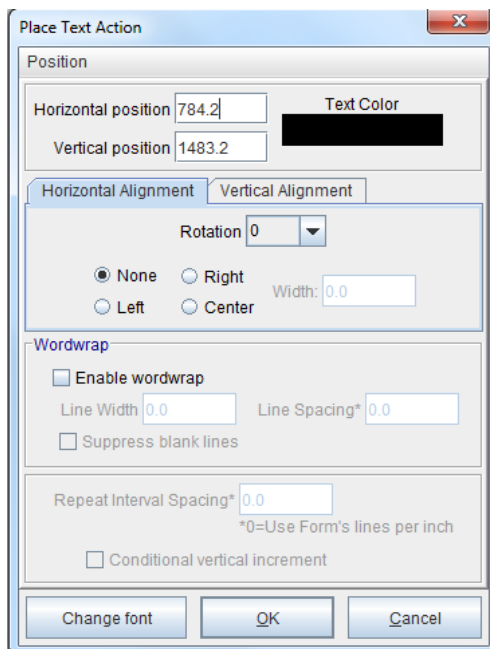
- The fax number will disappear from the Form and Data output window. To apply the new fax number to the Form and Data output create a new rule.
- Right click FaxTag* and select *Add Rule > Place Text*.

11. The Rule Properties dialog box displays. Enter a new rule name and click *OK*.



The screenshot shows the "Rule Properties" dialog box. It has a title bar with a close button (X). The main area contains a "Name" text box with "faxnumber" entered, a "Use variable" dropdown menu with "FaxTag" selected, and a checked checkbox labeled "Execute on all copies". At the bottom, there are three buttons: "Edit condition", "OK", and "Cancel".

12. The Place Text dialog box displays. Keep the existing horizontal and vertical positioning and click *OK*.



The screenshot shows the "Place Text Action" dialog box. It has a title bar with a close button (X). The "Position" section contains "Horizontal position" (784.2) and "Vertical position" (1483.2) text boxes, and a "Text Color" dropdown menu showing a black color swatch. Below this are two tabs: "Horizontal Alignment" and "Vertical Alignment". Under "Horizontal Alignment", there is a "Rotation" dropdown set to "0", and radio buttons for "None" (selected), "Right", "Left", and "Center". A "Width" text box is set to "0.0". The "Wordwrap" section has an unchecked "Enable wordwrap" checkbox, "Line Width" (0.0) and "Line Spacing*" (0.0) text boxes, and an unchecked "Suppress blank lines" checkbox. The "Repeat Interval Spacing*" text box is set to "0.0", with a note "*0=Use Form's lines per inch" below it. There is also an unchecked "Conditional vertical increment" checkbox. At the bottom, there are three buttons: "Change font", "OK", and "Cancel".

- The new fax number appears in the Form and Data Viewer.

The screenshot displays the eDIRECT software interface, divided into several panes:

- Project Pane (Top Left):** Shows a tree view for 'sampstm2' containing a 'Sample Statement' with 'Variables' (emailtag, FaxTag) and 'Rules' (faxnumber, Actions). The 'Place Text' action is selected.
- Variables Pane (Bottom Left):** A table showing variable values:

Variable	Value
emailtag	youraddress@company.c
FaxTag	394-832-0394
- Viewer Pane (Top Right):** Displays the rendered output of the statement. The text is:


```
Sample Customer One
0000 First Street
Snohomish, WA 98290
PH. 800-111-1111
FAX 360-111-1111
johndoe@minisoft.com
```

 The fax number '360-111-1111' is circled in red.
- Viewer Pane (Bottom Right):** Shows a form with a 'TRANSACTION' field set to 175.0 and a 'PURCHASE' field set to 178.4. Below the form, the rendered text is:


```
1024 First Street
Snohomish. WA 98290

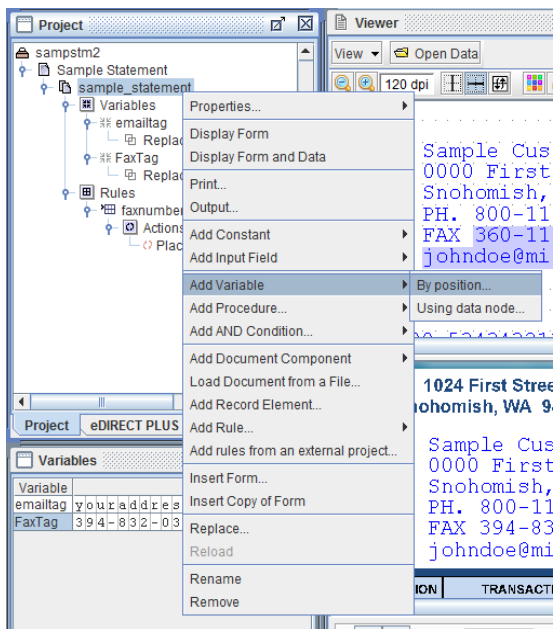
Sample Customer One
0000 First Street
Snohomish, WA 98290
PH. 800-111-1111
FAX 394-832-0394
johndoe@minisoft.com
```

 The fax number '394-832-0394' is circled in red.

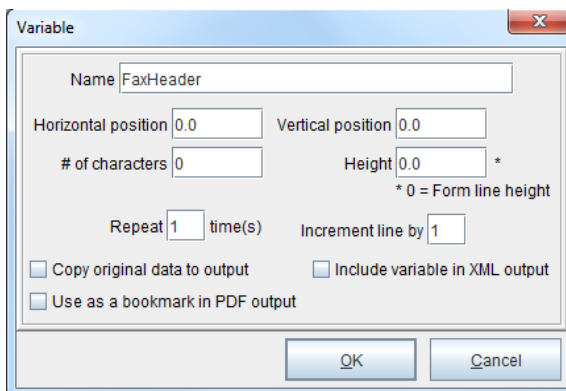
eDIRECT Tab

For our example we will be sending all merged output to a specified fax number contained in the data file. If using real data, the fax number could vary from page to page. To allow eFORMz to send the merged output to the different fax devices do the following:

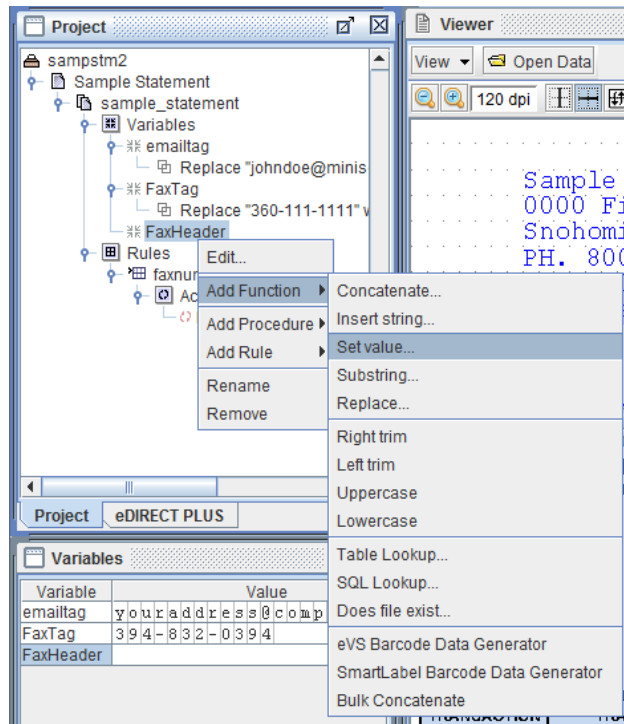
1. *Right click* the form (sample_statement) and select *Add Variable > By position*.



2. Enter a name and click OK.



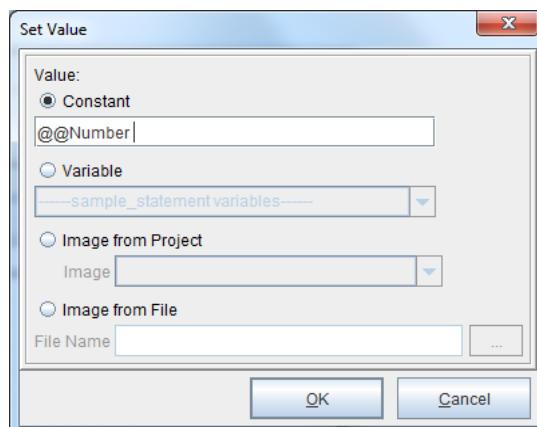
3. Right click the FaxHeader variable and select Add Function > Set Value.



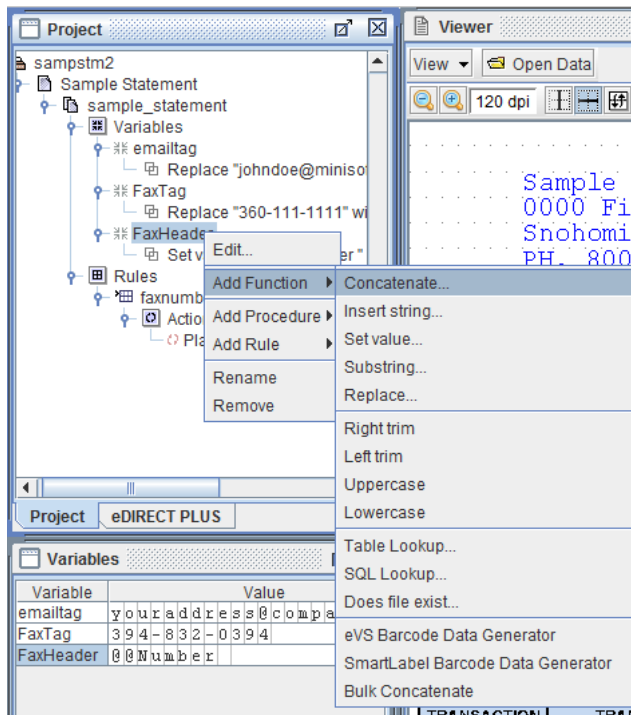
4. Enter your fax header information, for example:

@@Number

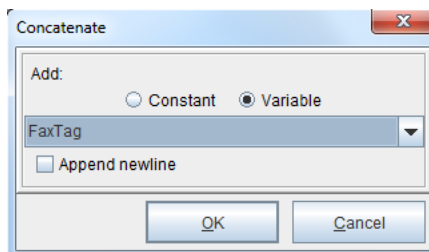
Note: Leave a space for where the fax number will normally appear.



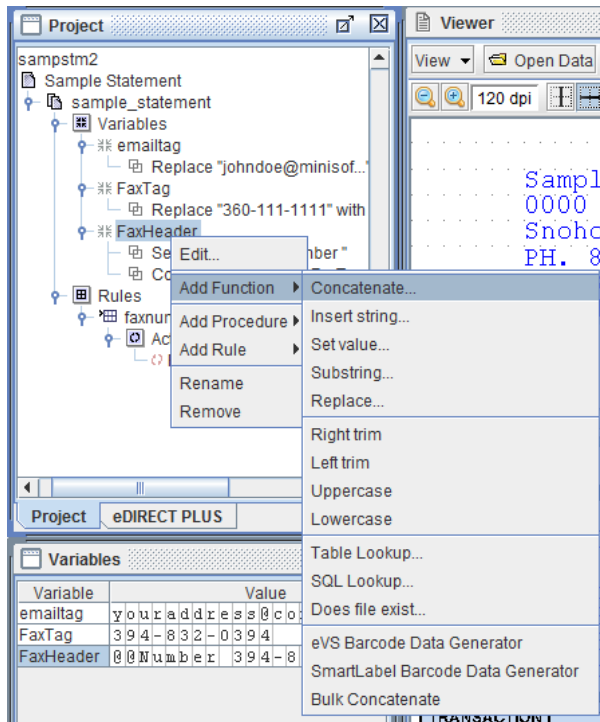
5. Right click *FaxHeader* and select *Add Function > Concatenate*.



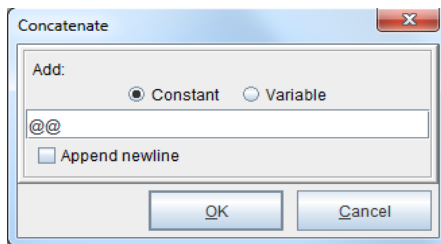
6. Choose the *FaxTag* variable from the *Variable* drop-down menu.



7. Right click the *FaxTag* variable and select *Add Function > Concatenate*.

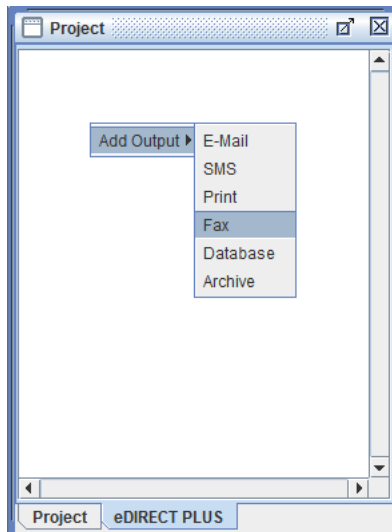


8. Enter the remainder of the fax header. Click OK. The *FaxHeader* will now contain the following: @@Number <FaxTag>@@.

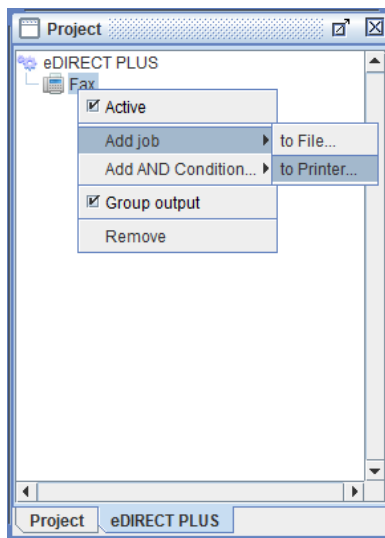


9. From the Project window switch to the eDIRECT (or eDIRECT PLUS) tab.

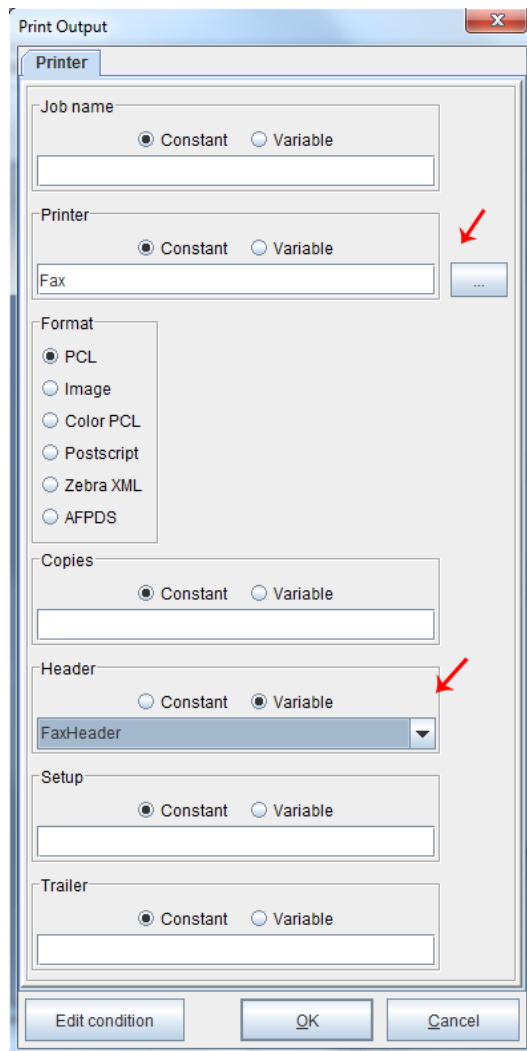
10. *Right click* in the Project window and select *Add Output > Fax*.



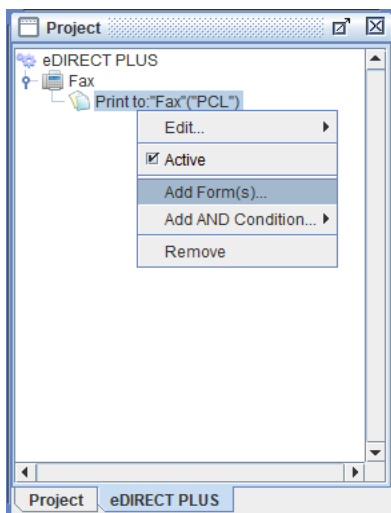
11. *Right click* the *Fax* output destination and select *Add job > to Printer*.



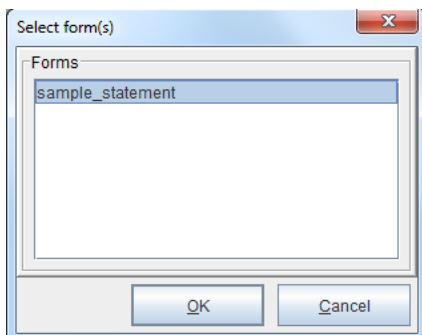
12. In the *Printer* field, add the fax server print queue. In the *Header* field, select the *FaxHeader* variable from the drop-down menu.



13. Right click *Print to:* and select *Add Form(s)*.



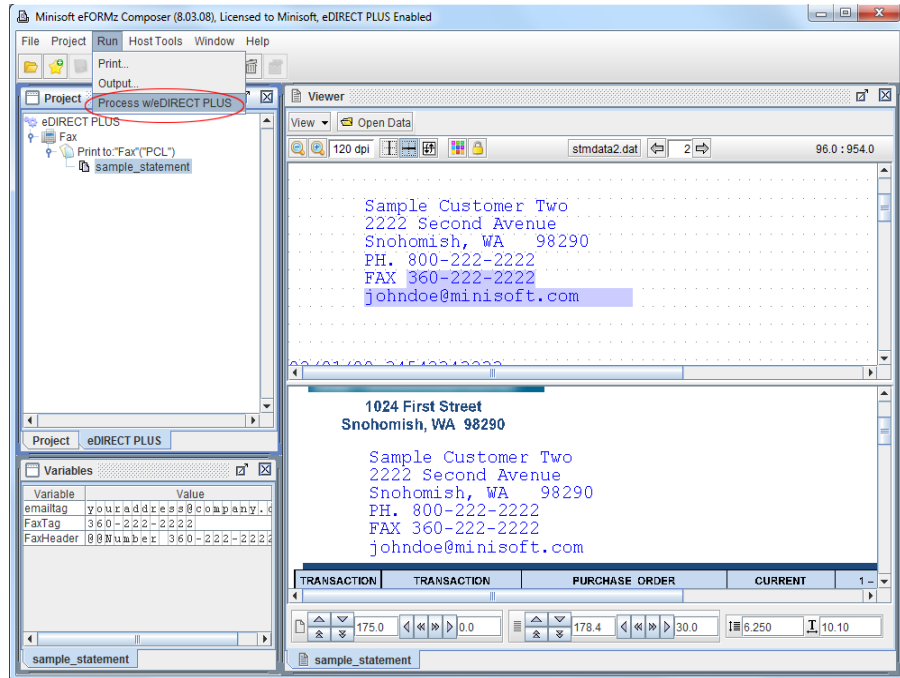
14. Pick the appropriate form. Click OK.



The Fax output destination now references the fully qualified Fax header, which references back to the fax tag placed within the project file. In this way, if a data file contains multiple fax numbers, merged output will be directed to the corresponding fax number.

Run the eDIRECT Process

1. From the eFORMz Composer select *Run > Process w/eDIRECT*:



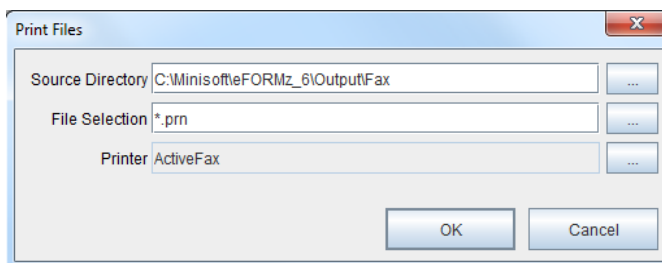
To redirect fax output to a specific folder monitored by your fax server, instead of *Add job > to Printer*, the user would select *Add job > to File* (See Step 11). See *Chapter 9: Print Automation > Local Toolkit* for more details.

Directing Output to a Fax Server

When Fax output is specified in eDIRECT, eFORMz simply creates a merged print file (.prn) containing the fax header information in record 1 of the merged output. This header information is necessary for processing by a fax server. The merged print file is created in a subfolder (\fax) under the output directory which automatically gets created if one does not already exist.

There are two options available for processing the merged print file to a fax server:

1. If the fax server software can be configured to monitor a folder for the eFORMz merged print file, you can either have the fax server software monitor the output directory containing the subfolder for the fax output from eFORMz or using an 'external' command redirect the output to a folder on the fax server using a MOVE command.
2. The other option is to instruct eFORMz to 'PRINT' the merged print file to the fax print queue. To do so, add a Print File post process command after the *Process with eDIRECT* entry. The *Source Directory* will be \fax folder and the *File Selection* field refers to the print files generated during the merge process. Please note that wild-card entries are permitted.



TIP: It is recommended to delete, rename, or move these files using a *post process command* after they have been processed by your fax server otherwise they will be transmitted over again.

Advanced eDIRECT Features

- ◆ Sorting
- ◆ Attach Name Option
- ◆ SMTP Options
- ◆ PDF Encryption
- ◆ PDF Viewing
- ◆ Creating Dynamic Subfolders
- ◆ File Header and Trailer Options

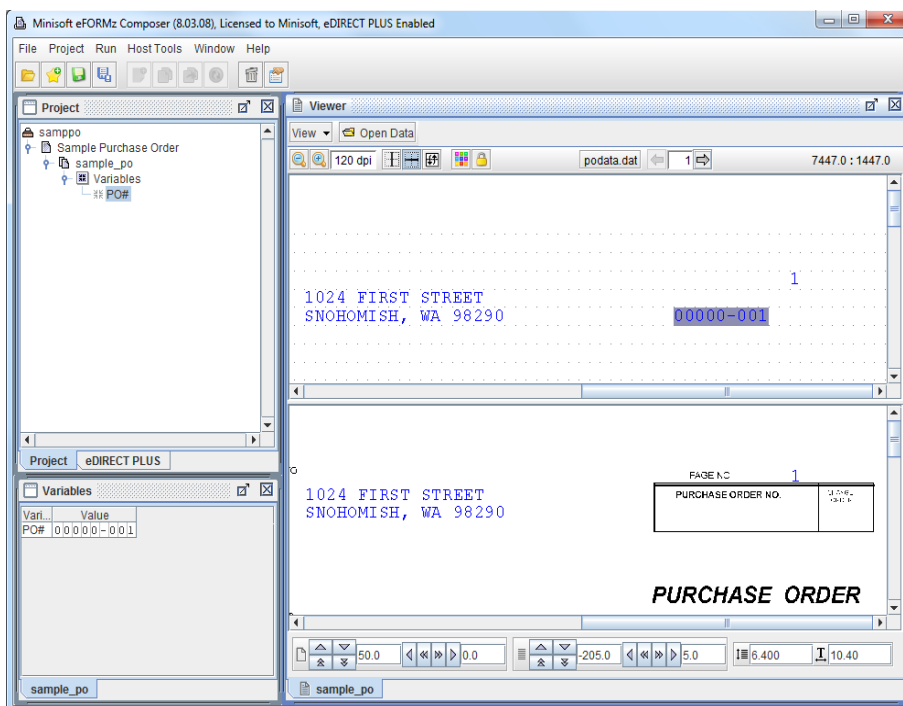
Sorting

Variable Group - E-Mail and Faxing

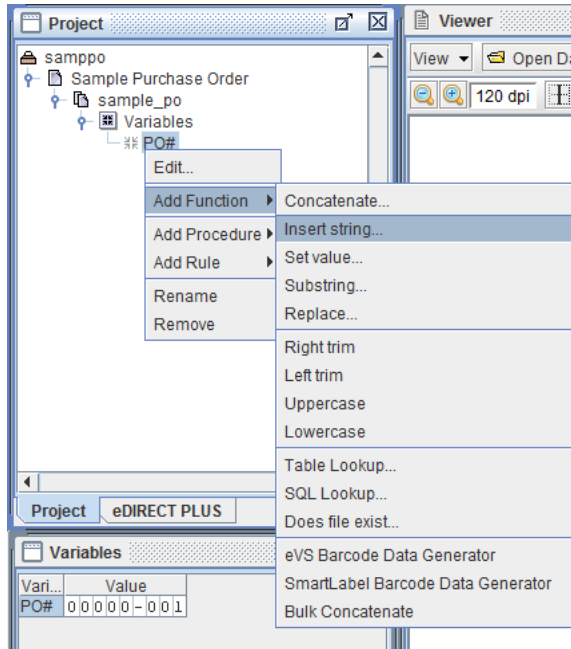
When eDIRECT processes e-mail addresses or fax numbers based on a reference within a data file or database, identical e-mail addresses or fax numbers are grouped together allowing for consolidated file attachments.

If, for example, purchase orders are being processed and the same e-mail address or fax number appears consecutively but pertains to a different purchase order number, the Sort tab from the Project Properties can then be used to separate these pages by purchase order number.

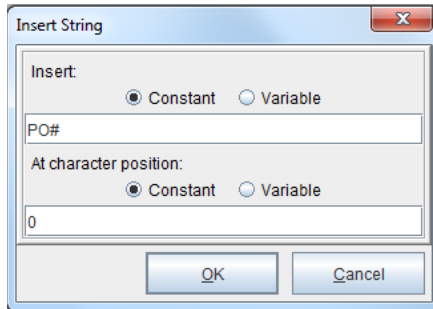
1. For example, add a variable that tags the PO Number within your data file.



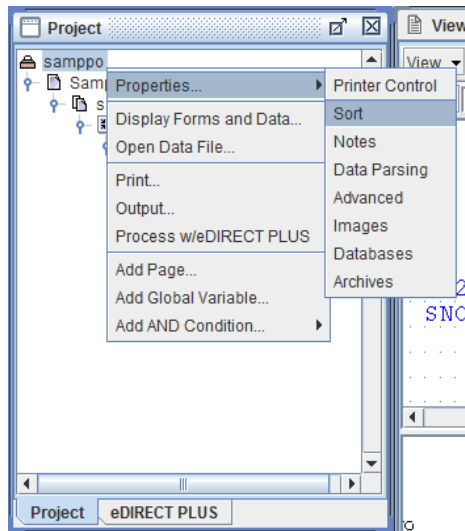
2. Right click the variable and select *Add Function > Insert String*.



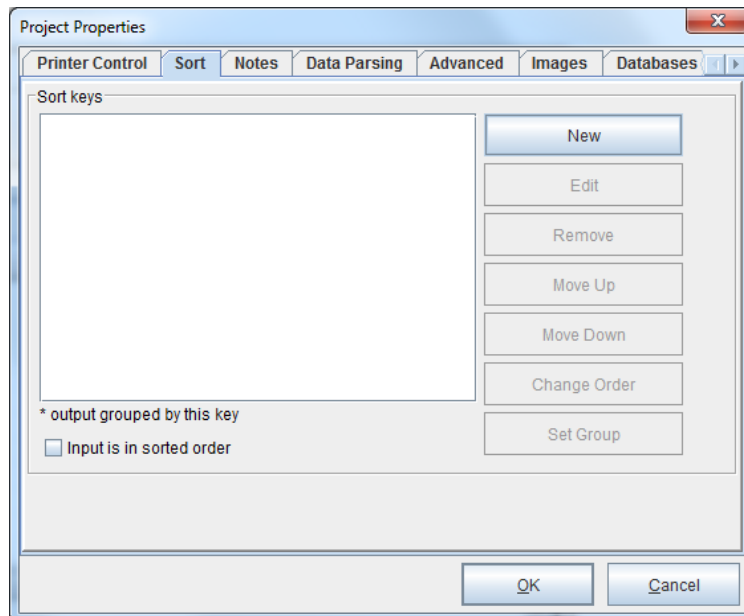
3. Enter a constant value at the beginning of the variable data. Click *OK*.



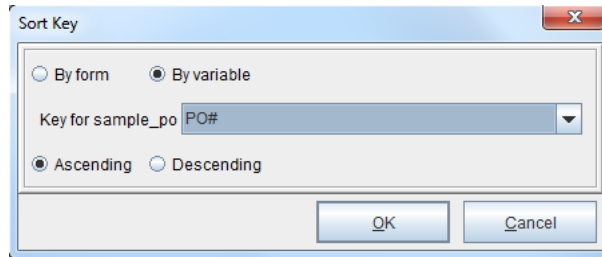
4. Right click the project and select *Properties > Sort*.



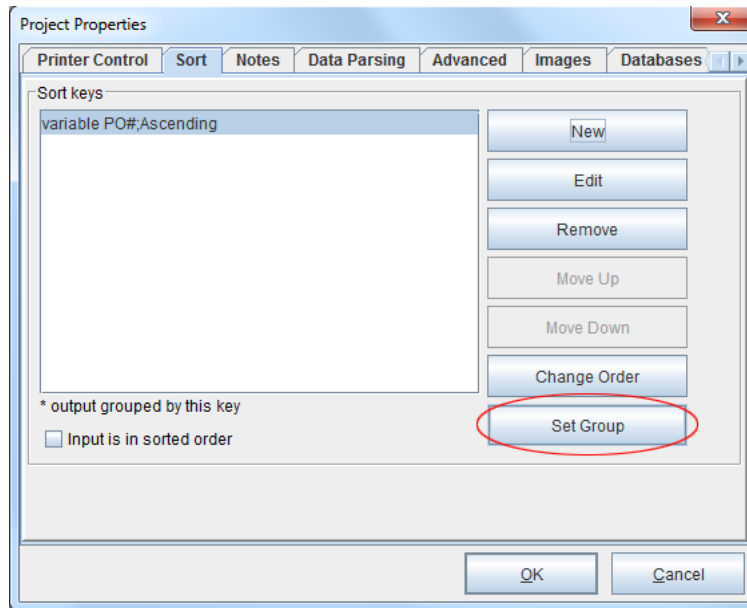
5. From the Sort tab, select the *New* option.



- The Sort Key will display. Choose the *By variable* option and pick the variable created earlier from the drop-down menu. Click *OK*.

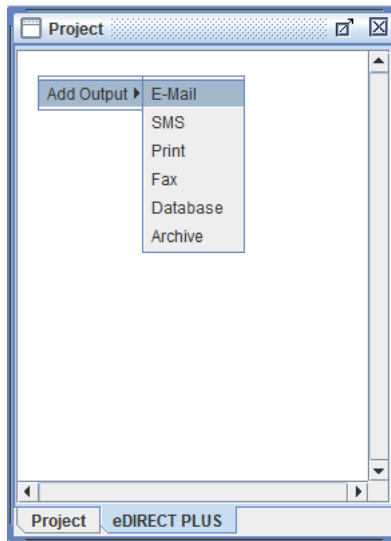


- Select the Set Group button and click *OK*.

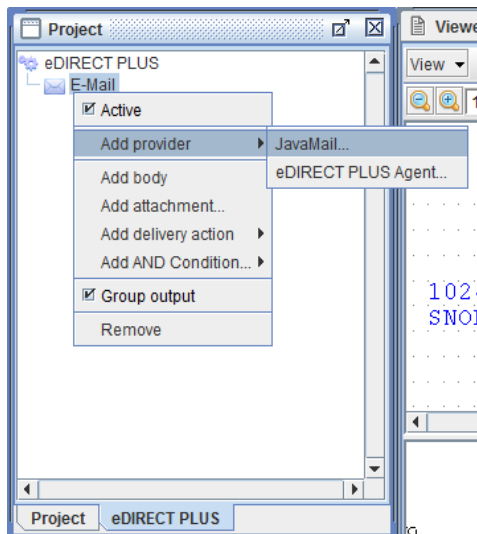


NOTE: For more on the Sort feature, refer to the Sort section in the Project Properties portion of *Ch. 3: eFORMz Composer Menus and Project Options*.

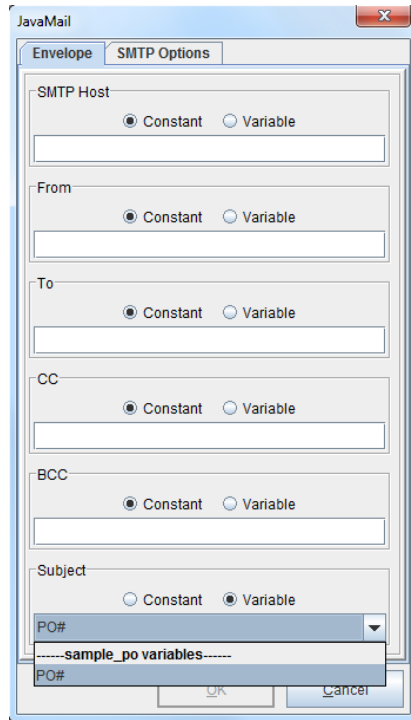
- Switch to the eDIRECT (or eDIRECT PLUS) tab. *Right click* in the Project window and select *Add Output > E-Mail*.



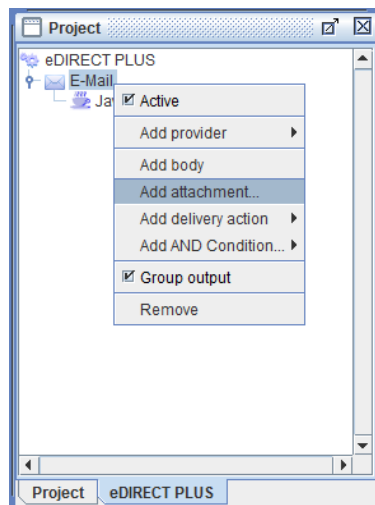
- Right click* the *E-Mail* and select *Add provider > JavaMail*.



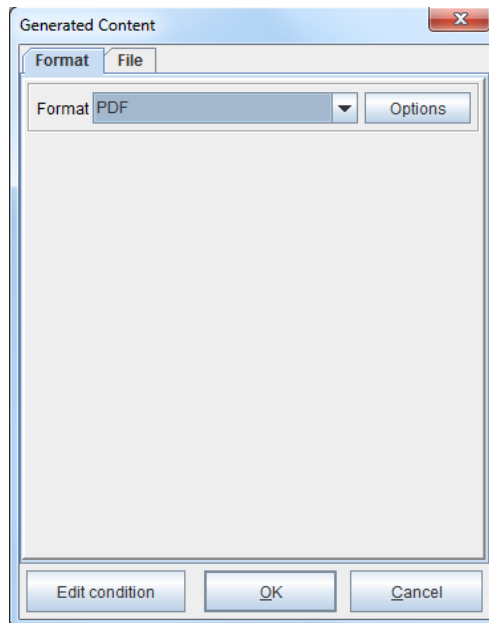
10. Enter information for the necessary fields. For the *Subject* field, select the variable created earlier from the drop-down menu. When complete, click *OK*.



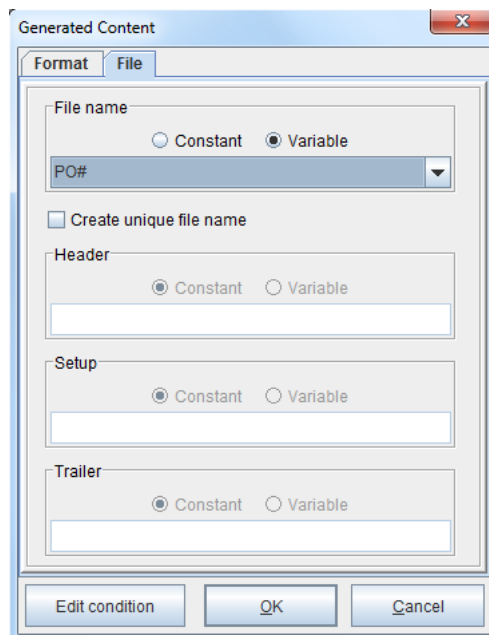
11. Right click *E-Mail* and select *Add attachment*.



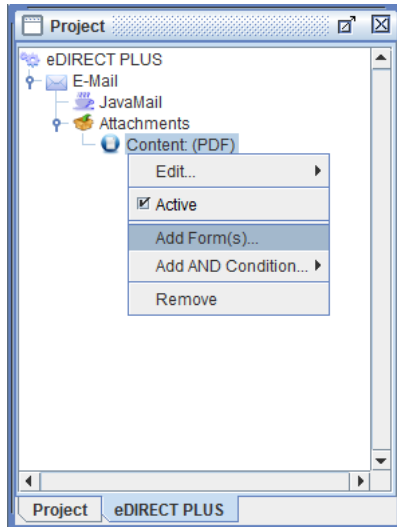
- Choose *PDF* and switch to the File tab.



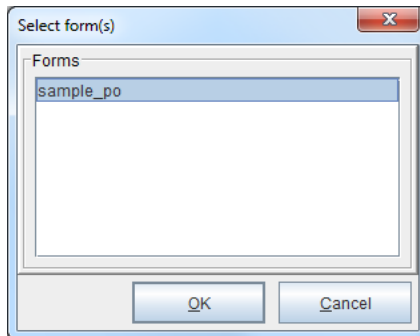
- Select the variable created earlier for the *File name*. Click *OK*.



14. Right click *Content: (PDF)* and select *Add Form(s)*.



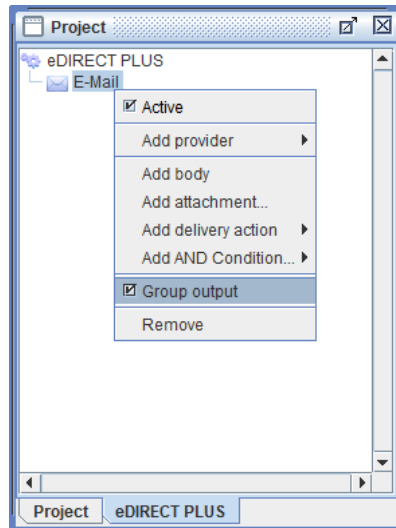
15. Choose the appropriate form and click *OK*.



16. From the eFORMz Main Menu, highlight *Run* and pick the *Process w/eDIRECT* option. When the process is implemented, a file containing multiple purchase orders will be split based on the Sort key that has been set in the Project Properties.

Group Output

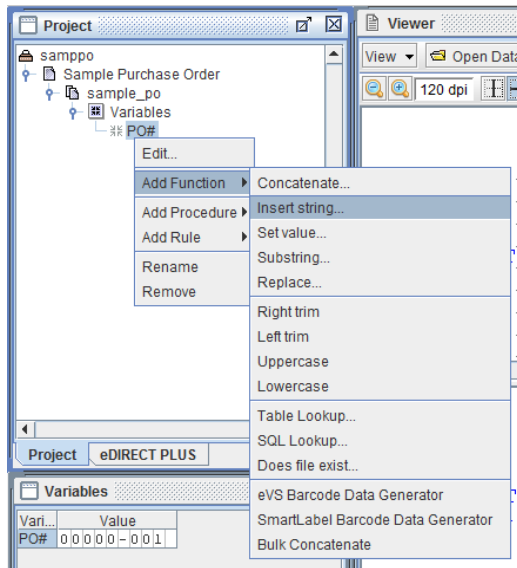
eDIRECT output can be set to have the output grouped (which is the current default) or not grouped. The selection is done with a check menu item on the popup menu for the output node. If checked, individual pages are consolidated into a single output file (print, email, fax).



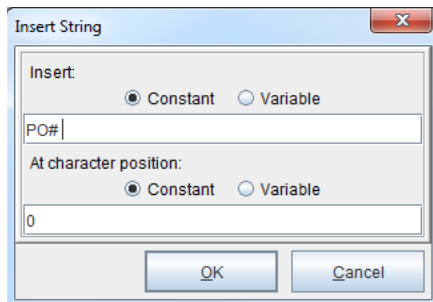
Attach Name Option

When a pdf file is created by eFORMz, by default, the project file name is attached to the corresponding pdf file. If, for example, purchase orders are being processed and they need the pdf file name to have the attached purchase order number, use the following procedure:

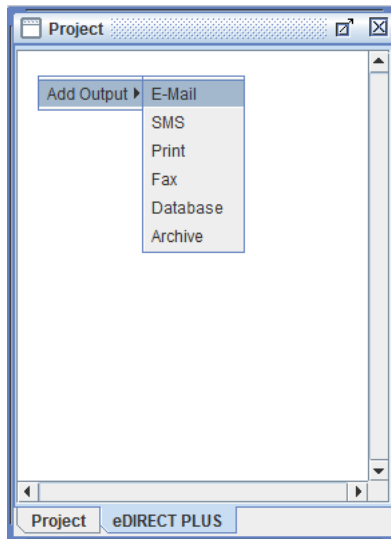
1. Tag the appropriate field (i.e. purchase order number) using a variable within the eFORMz Composer.
2. *Right click* the variable and select *Add Function > Insert String*.



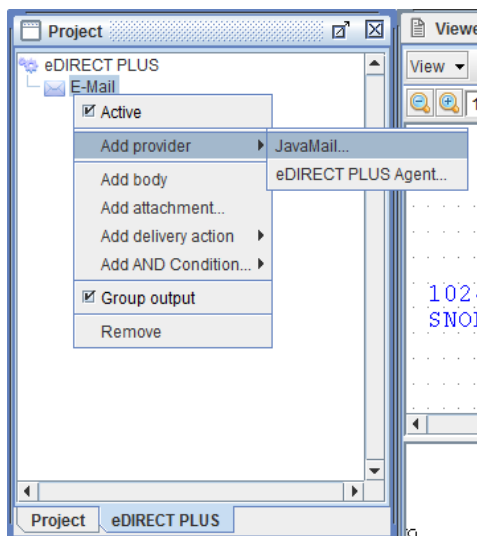
3. Enter a constant value at the beginning of the variable data. Click *OK*.



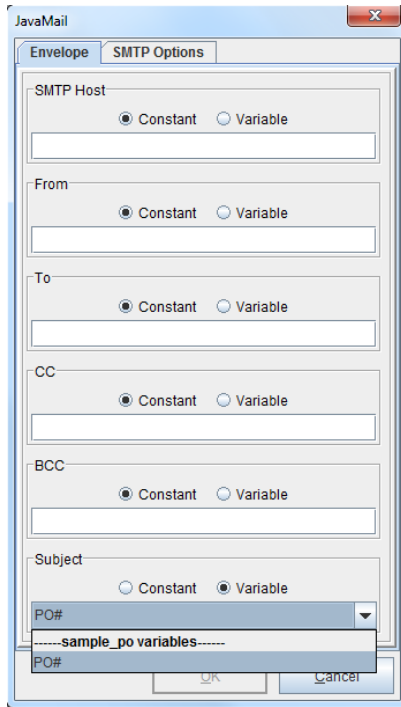
4. Switch to the eDIRECT (or eDIRECT PLUS) tab. *Right click* in the Project window and select *Add Output > E-Mail*.



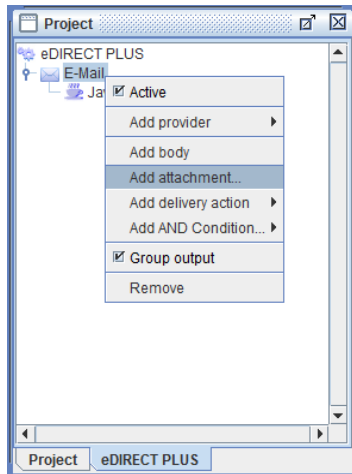
5. *Right click* the *E-Mail* and select *Add provider > JavaMail*.



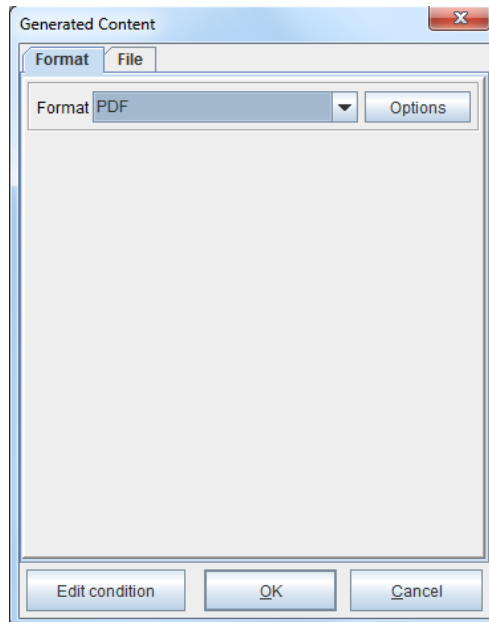
6. Enter information for the necessary fields. For the *Subject* field, select the variable created earlier from the drop-down menu. When complete, click *OK*.



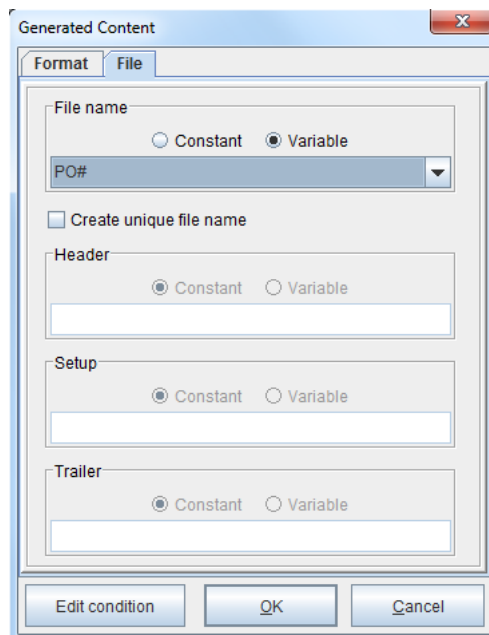
7. Right click *E-Mail* and select *Add attachment*.



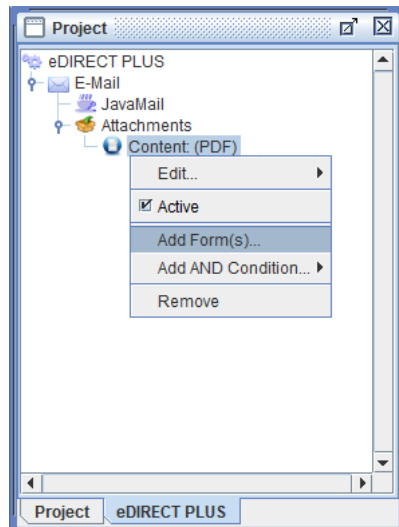
8. Choose *PDF* and switch to the File tab.



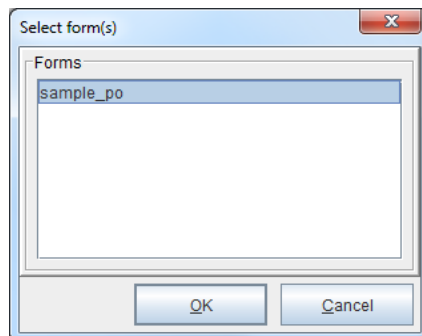
9. Select the variable created earlier for the *File name*. Click *OK*.



10. Right click *Content: (PDF)* and select *Add Form(s)*.



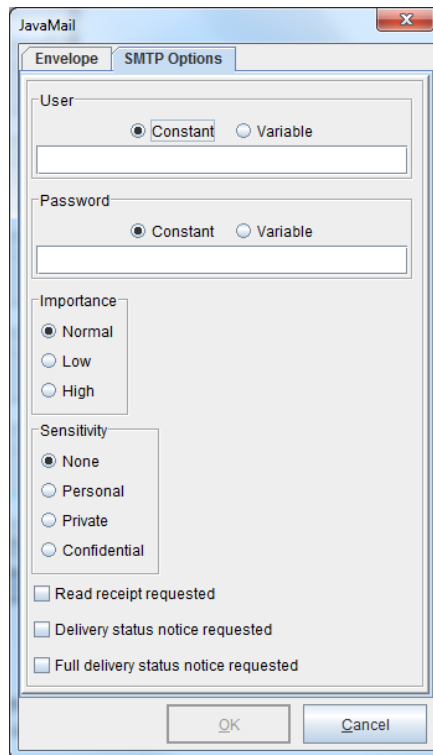
11. Choose the appropriate form and click *OK*.



12. From the eFORMz Main Menu, highlight *Run* and pick the *Process w/eDIRECT* option.

SMTP Options

eFORMz allows you to enable Simple Mail Transfer Protocol (SMTP) within eDIRECT. In order for this option to function, the server used must support SMTP.



The screenshot shows a dialog box titled "JavaMail" with two tabs: "Envelope" and "SMTP Options". The "SMTP Options" tab is active. It contains several sections:

- User:** Radio buttons for "Constant" (selected) and "Variable", followed by a text input field.
- Password:** Radio buttons for "Constant" (selected) and "Variable", followed by a text input field.
- Importance:** Radio buttons for "Normal" (selected), "Low", and "High".
- Sensitivity:** Radio buttons for "None" (selected), "Personal", "Private", and "Confidential".
- Request Options:** Three checkboxes: "Read receipt requested", "Delivery status notice requested", and "Full delivery status notice requested".

At the bottom are "OK" and "Cancel" buttons.

Options include:

User and *Password* used if needed.

Importance sets the priority of the email. Options include normal, low, high.

Sensitivity sets the condition of the email. Options include none, personal, private, confidential.

There are three request options: *Read receipt requested*, *Delivery status notice requested* and *Full delivery status notice requested*.

PDF Encryption

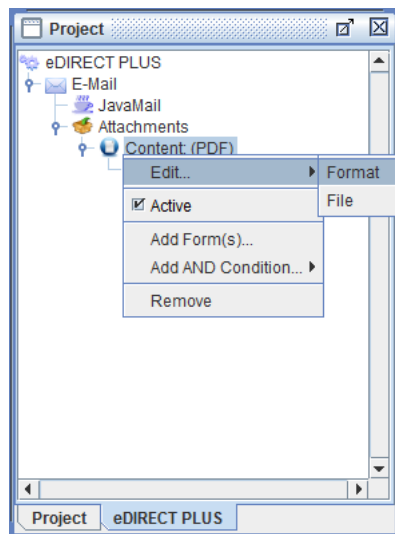
Encrypt your PDF documents in one of the following ways:

- ◆ Standard 40-bit
- ◆ Standard 128-bit
- ◆ AES 128-bit (Advanced Encryption Standard)

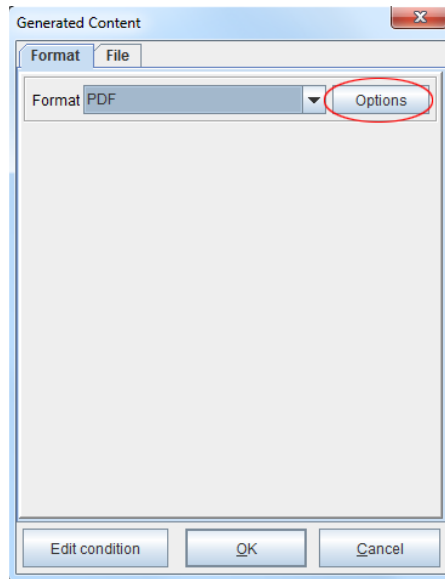
Implementing PDF Encryption

To implement PDF Encryption from eDIRECT:

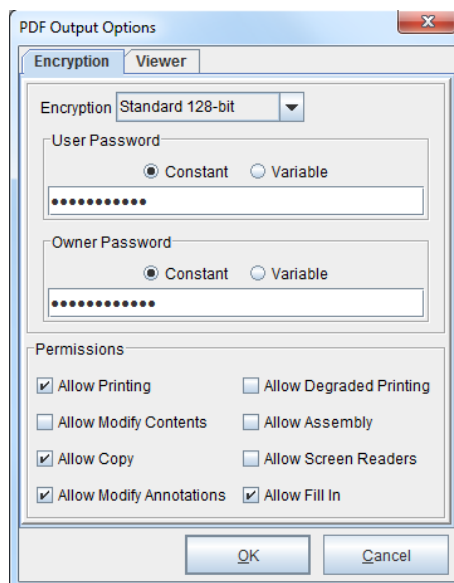
1. *Right click Content: (PDF) and select Edit > Format.*



2. Select *Options* and edit the available encryption options.



3. The PDF Output Options dialog box will display:



Encryption

Options include *Standard 40-bit*, *Standard 128-bit* and *AES 128-bit* encryption. Encryption is used to enforce restrictions on your document. The permissions that can be granted or restricted depend on the strength of the encryption (*40-bit* vs. *128-bit*). If you are using *40-bit* encryption, every permission that has the remark *128-bit* below is granted automatically. If you want to revoke these permissions, you need to use *128-bit* encryption.

User Password

Refers to the 'open password'.

Owner Password

Refers to the 'permissions password'.

The maximum password length is 32 characters. You may enter 32 characters or more but only the first 32 characters will be taken into account. One or both of the passwords fields can be empty. If a user password is not specified, all users will be able to open the document without being prompted for a password, but the permissions and restrictions (if any) will remain in place.

For a higher level of encryption for your document, choose *128-bit* key length and always set both passwords, using different strings and all 32 characters for each one. If a password you choose is shorter than 32 characters, it will be padded with default padding.

Allow Printing

(*Default checked*) Printing the document.

Allow Degraded Printing

(*128-bit*) Printing the document, lesser quality printout than *Allow Printing*.

Allow Modify Contents

Modifying the contents—for example, changing page content, inserting or removing pages.

Allow Assembly

(*128-bit*) Inserting, removing, rotating pages and adding bookmarks are allowed. Contents of a page cannot be changed, unless *All Modify Content* is allowed.

Allow Copy

(*Default checked*) Copying or extracting text and graphics from the document, including technologies such as screen readers or other accessibility devices.

Allow Screen Readers

(128-bit) Extracting text and graphics from document using an accessibility devices.

(Default checked) Allow Modify Annotations

Adding or modifying text annotations and interactive form fields.

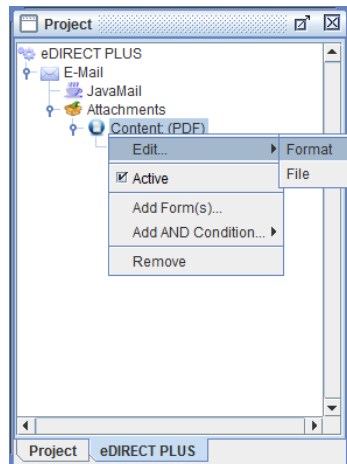
(Default checked) Allow Fill In

(128-bit) Filling form fields; adding or modifying annotations only if *Allow Modify Annotations* is granted.

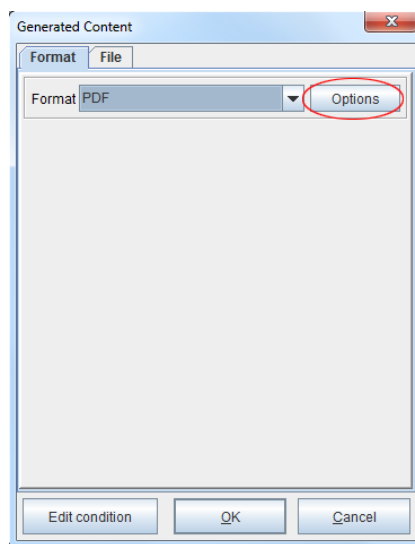
PDF Viewing

To modify PDF viewing options for PDF documents:

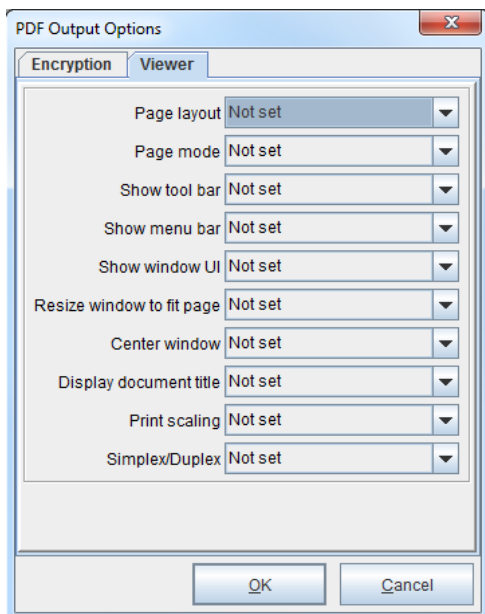
1. *Right click Content: (PDF) and select Edit > Format.*



2. *Select Options.*



- The PDF Output Options dialog box will display. Switch to the Viewer tab:



Page layout

The page layout to be used when the document is opened:

Single page - Display one page at a time (*default*).

One column - Display the pages in one column.

Two columns, odd on the left - Display the pages in two columns, with odd-numbered pages on the left.

Two columns, odd on the right - Display the pages in two columns, with odd-numbered pages on the right.

Two pages, odd on the left - Display the pages two at a time, with odd-numbered pages on the left.

Two pages, odd on the right - Display the pages two at a time, with odd-numbered pages on the right.

Page mode

Sets how the document should be displayed when opened:

None - Neither document outline, nor thumbnail images visible (*default*).

Show Outlines - Document outline visible.

Show Thumbnails - Thumbnail images visible.

Full screen - Full-screen mode. No menu bar, window controls, or other windows will be visible.

Show tool bar

Displays (or hides) the toolbar.

Show menu bar

Displays (or hides) the menu bar.

Show window UI

Displays (or hides) the window user interface.

Show menu bar

Displays (or hides) the menu bar.

Resize window to fit page

Adjusts the window to fit the page.

Center window

Centers the window.

Display document title

Displays the title of the PDF document.

Print scaling

The *Default* option scales the PDF to a printable area.

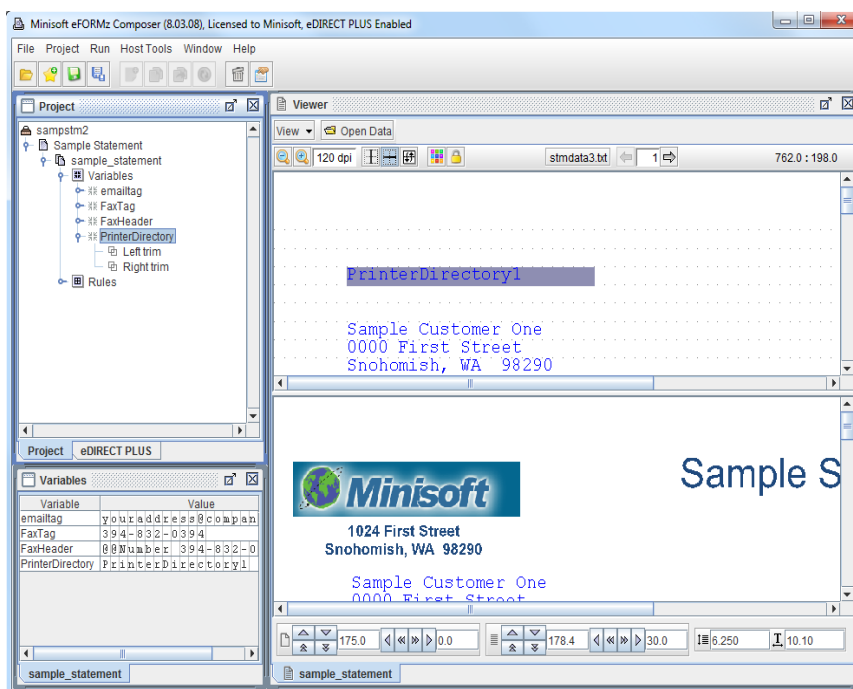
Simplex/Duplex

Printing options include *Simplex*, *Short Edge Duplex*, and *Long Edge Duplex*.

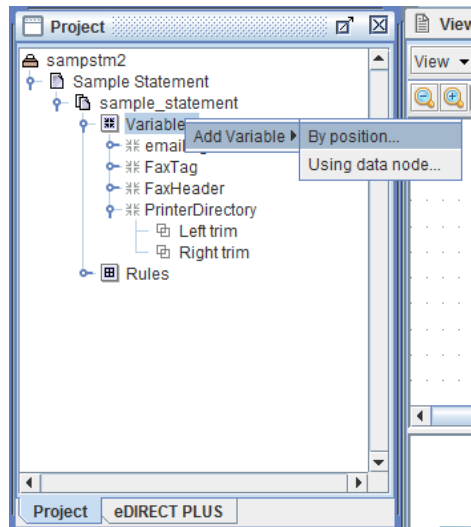
Creating Dynamic Subfolders

Dynamic subfolders can be created in eDIRECT under the parent directories of Print, Fax, or E-Mail. Subfolders can be dynamically created using variables from within the project file, for example:

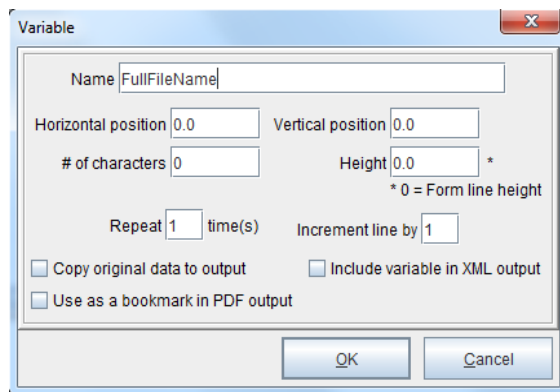
1. Create a variable that references a data element from within your data file:



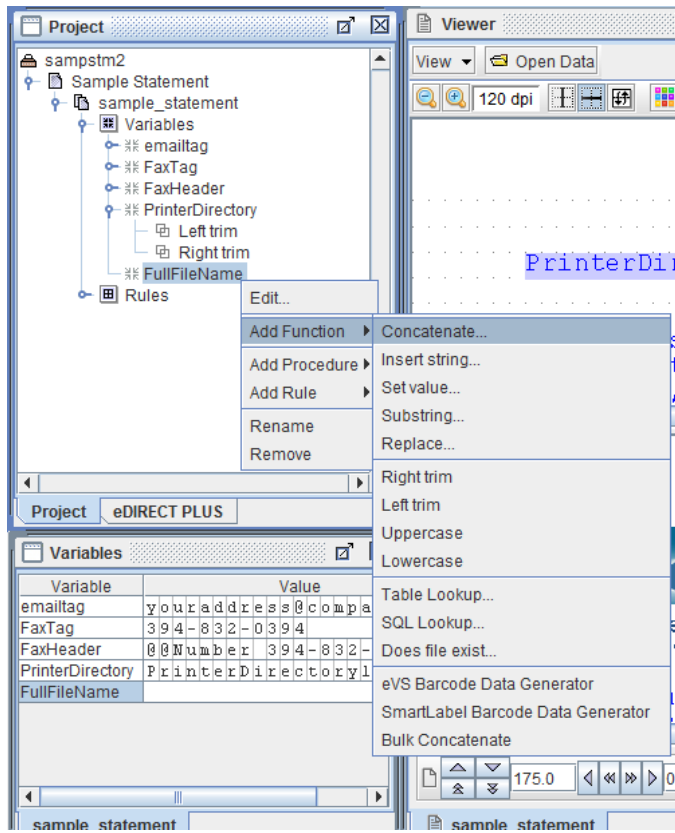
2. Add a variable *By position*.



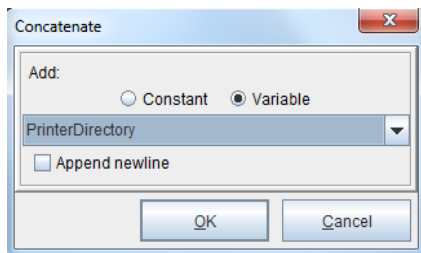
3. Enter a name and click *OK*.



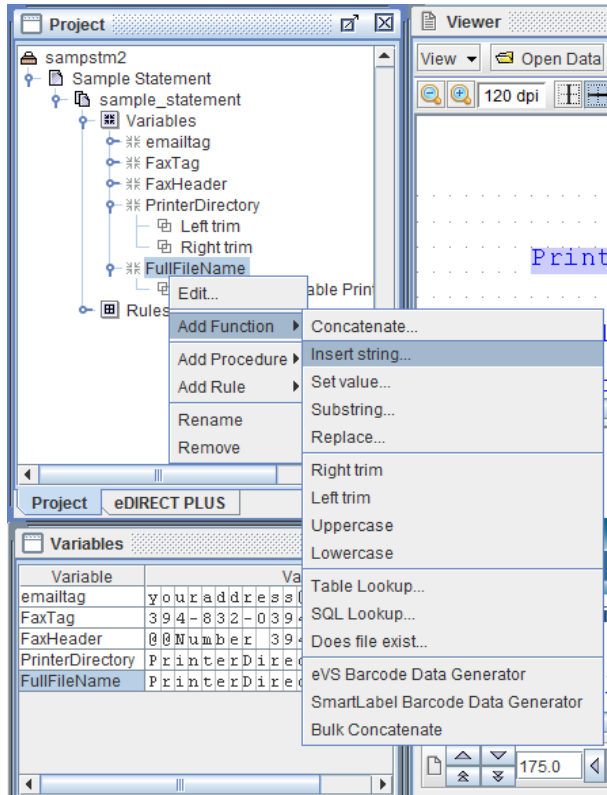
4. Right click the variable and select *Add Function > Concatenate*.



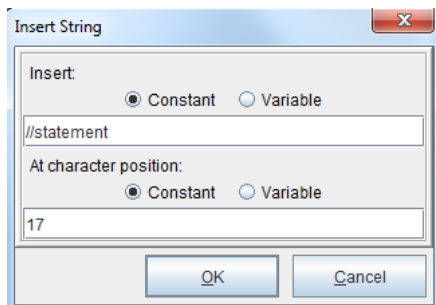
5. Pick the variable created earlier that references the data element.



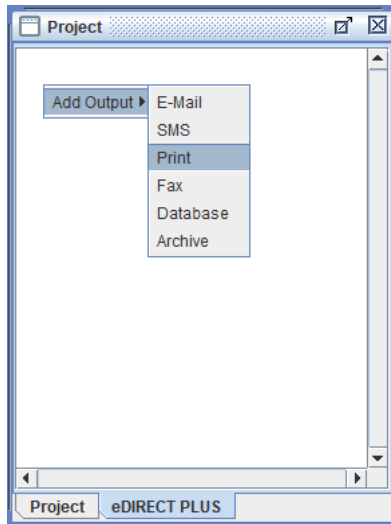
6. Right click the variable created by position and select *Add Function > Insert String*.



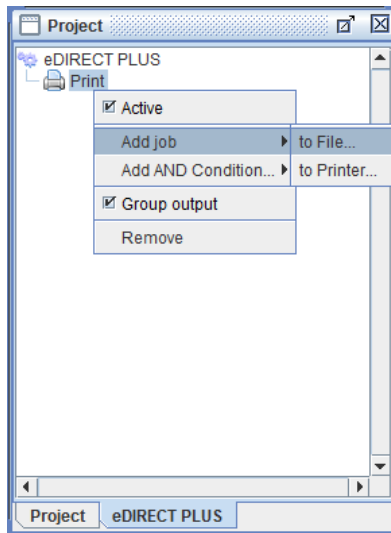
7. Insert two forward slashes (//) to the end of the variable, followed by a constant value. The forward slashes indicate that the reference appearing before them is the dynamic folder reference. The constant value after the slashes will be the file name of the output. Click *OK*.



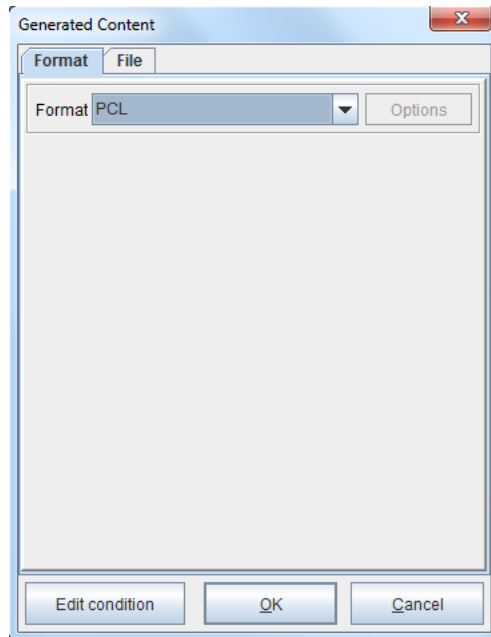
- Switch to the eDIRECT (or eDIRECT PLUS) tab. *Right click* in the Project window and select *Add Output > Print*.



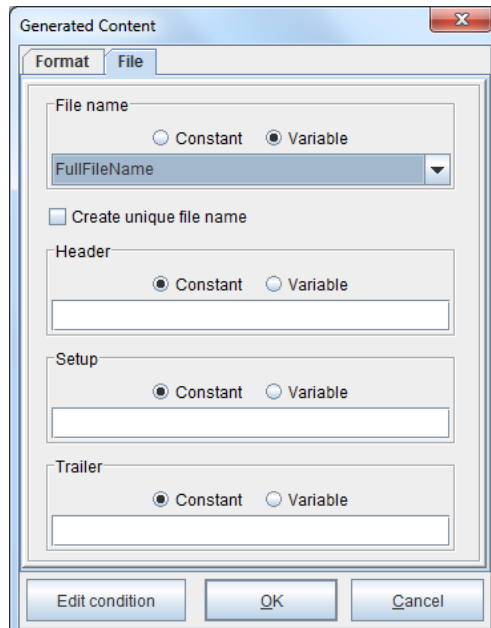
- Right click* *Print* and select *Add job > to File*.



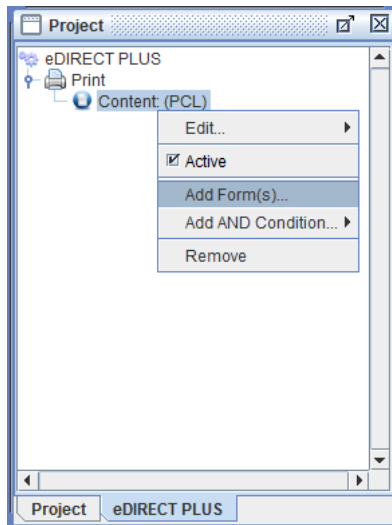
10. Choose the *Format* and switch the File tab.



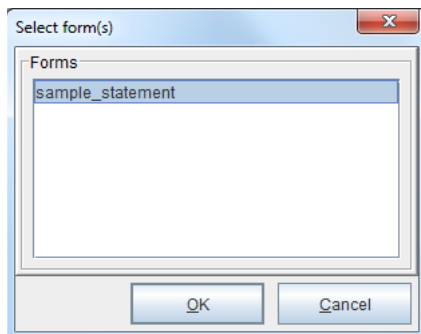
11. In the *File name* field, select the variable created earlier by position. Click *OK*.



12. Right click the *Content* icon and select *Add Form(s)*.



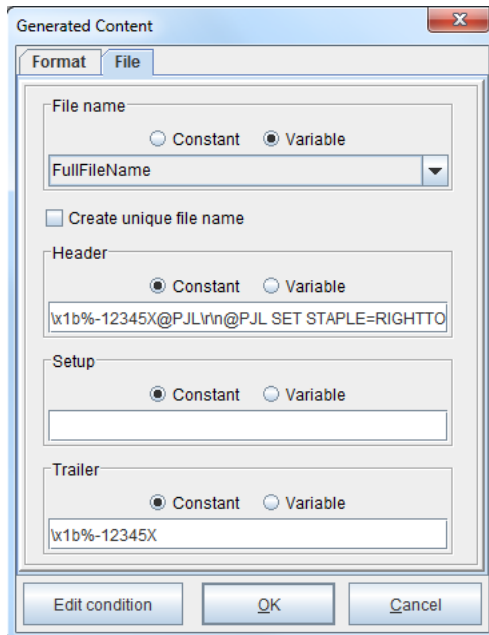
13. Pick the form and click *OK*.



14. From the eFORMz Main Menu, navigate to *Run* and select *Process w/eDIRECT*. Check the project directory. For this example, the Print directory should now have a new folder based on the variable reference. The new folder should also contain the specified output.

File Header and Trailer Options

Using the File Header and Trailer option, custom code can be added to file output. For example, if PDL codes for stapling need to be added to the output file enter the beginning and ending PDL codes into the File Header and Trailer fields.



The screenshot shows a dialog box titled "Generated Content" with a close button (X) in the top right corner. The dialog has two tabs: "Format" and "File", with "File" selected. The "File" tab contains the following sections:

- File name:** Radio buttons for "Constant" and "Variable" (selected). A dropdown menu shows "FullFileName".
- Create unique file name
- Header:** Radio buttons for "Constant" (selected) and "Variable". A text box contains the code: `\x1b%-12345X@PJL\r\n@PJL SET STAPLE=RIGHTTO`
- Setup:** Radio buttons for "Constant" (selected) and "Variable". An empty text box is present.
- Trailer:** Radio buttons for "Constant" (selected) and "Variable". A text box contains the code: `\x1b%-12345X`

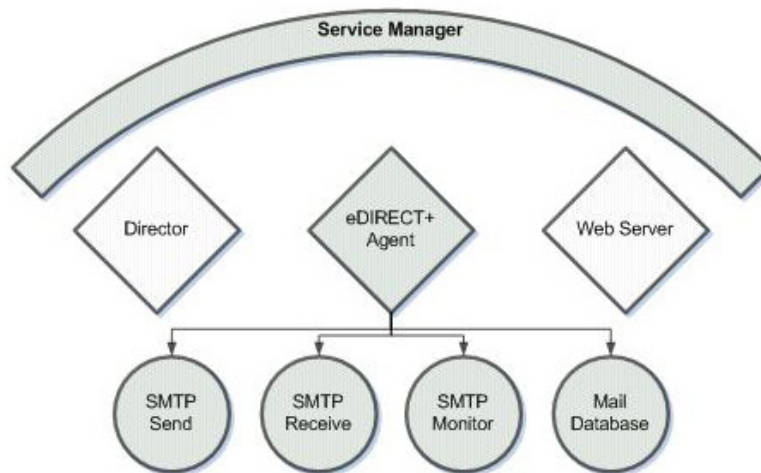
At the bottom of the dialog are three buttons: "Edit condition", "OK", and "Cancel".

eDIRECT+ Overview

eDIRECT+ Agent

The eDIRECT+ Agent is a service that runs on a server for email distribution and tracking. The eDIRECT+ Agent Service (communications, maintenance, monitoring, and control) is composed of three functional units and a database:

- ◆ SMTP Send (Outbound Mail Transfer Agent)
- ◆ SMTP Receive (Inbound Mail Transfer Agent)
- ◆ SMTP Monitor (Relay agent for enhancement and tagging)
- ◆ Mail Database (Persistent storage area)



SMTP Send

The SMTP Send Service is used to transmit and track eFORMz/eDIRECT+ email messages to the appropriate destination. It periodically checks the message queue for messages to be acted upon. It will pass the message to a thread that sends the message.

SMTP Receive

The SMTP Receive Service listens for incoming SMTP messages. It will receive Delivery Status Notification (DSN) replies from messages that have been sent. It also supports the Response Tracking module inside eDIRECT+.

SMTP Monitor

The SMTP Monitor Service is used to capture outgoing email messages for enhancement by an eFORMz project. It receives messages on an arbitrary port and then copies that data to a new file.

Mail Database

The Mail Database is a JDBC accessible database that stores messages. Scripts are provided for both SQL Server and MySQL.

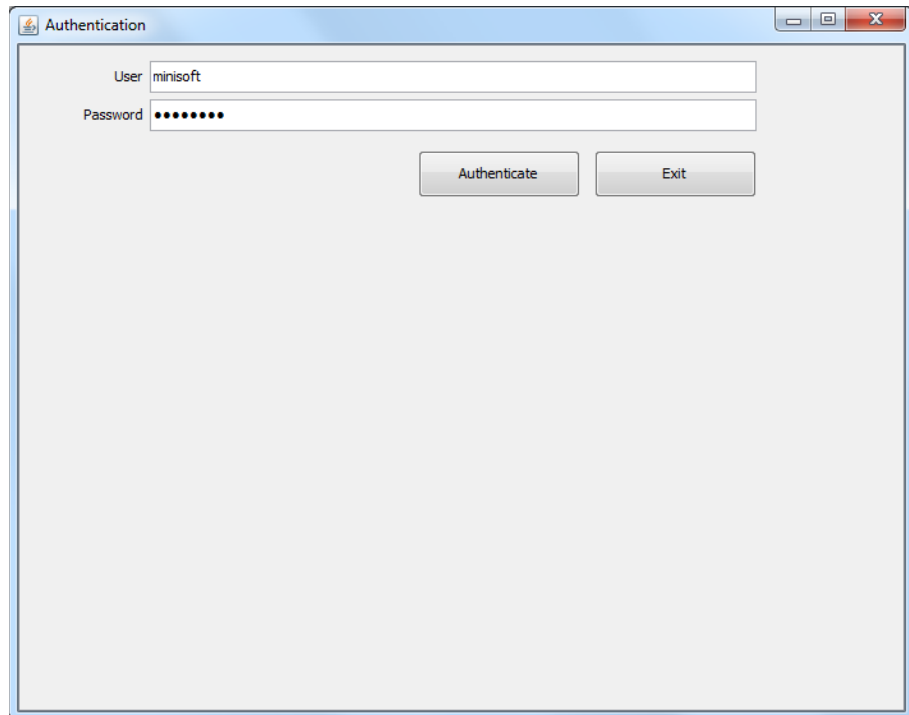
eDIRECT+ Agent Configuration

The eDIRECT+ Agent Configuration Application arranges the initial settings of the eDIRECT+ Agent service. To configure the eDIRECT+ Agent Configuration:

1. Run the eDIRECT+ Agent Configuration application:
C:\Minisoft\efORMz_6\edp_AgentConfig.exe
2. Once open, the eDIRECT+ Agent Configuration dialog box will display. Click OK to proceed.



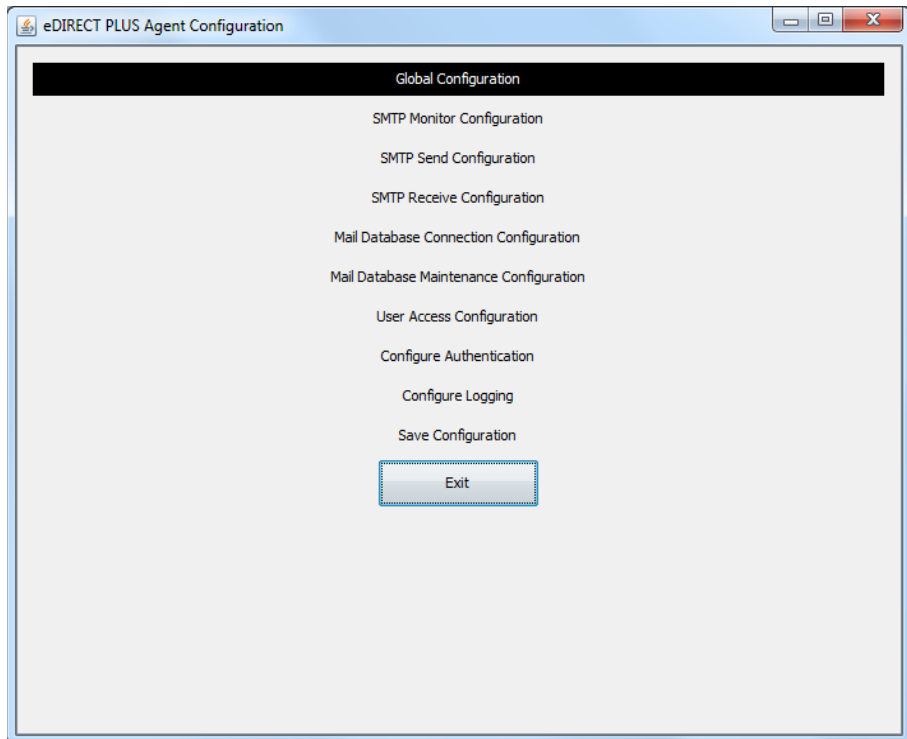
3. The default username is '*minisoft*' and the default password is '*password*' though both properties can be changed. To customize the values, set the Registered User entry key and the Registered Password entry key from the Configure Authentication menu option.



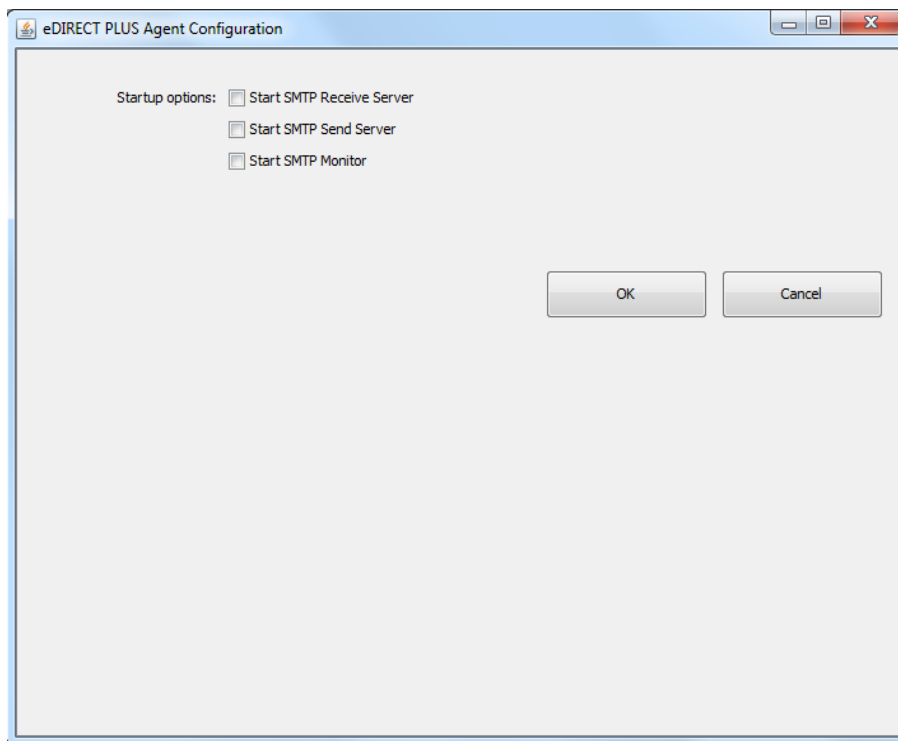
Global Configuration

The Global Configuration sets whether the SMTP Monitor, SMTP Send and the SMTP Receive services will commence when the eDIRECT+ Agent is started.

1. From the eDIRECT+ Agent Configuration Menu, select the Global Configuration option.



2. The Global Configuration dialog box will display.



Options:

Start SMTP Receive Server

When checked, this will listen for incoming email messages when the eDIRECT+ agent starts. (Inbound Mail Transfer Agent)

Start SMTP Send Server

When checked, this will monitor for queued messages when the eDIRECT+ agent starts. (Outbound Mail Transfer Agent)

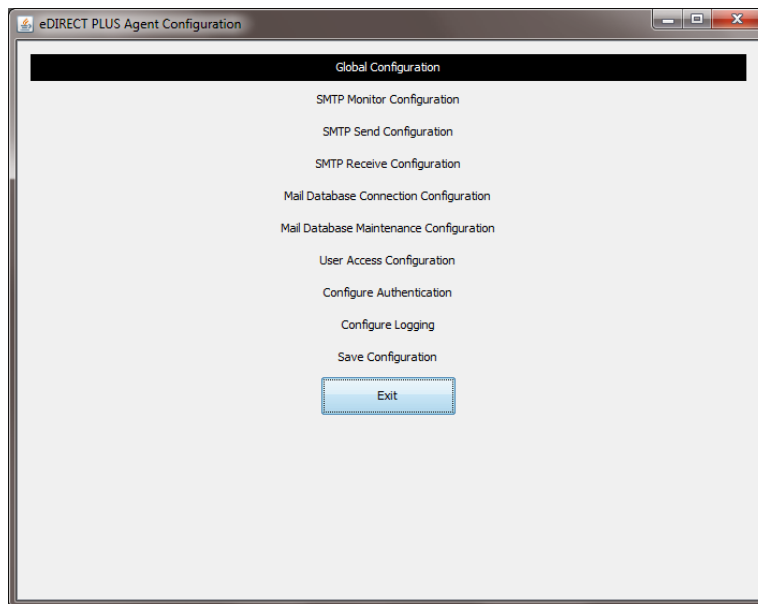
Start SMTP Monitor

When checked, this will start the SMTP Monitor when the eDIRECT+ agent starts. (Relay agent for enhancement and tagging)

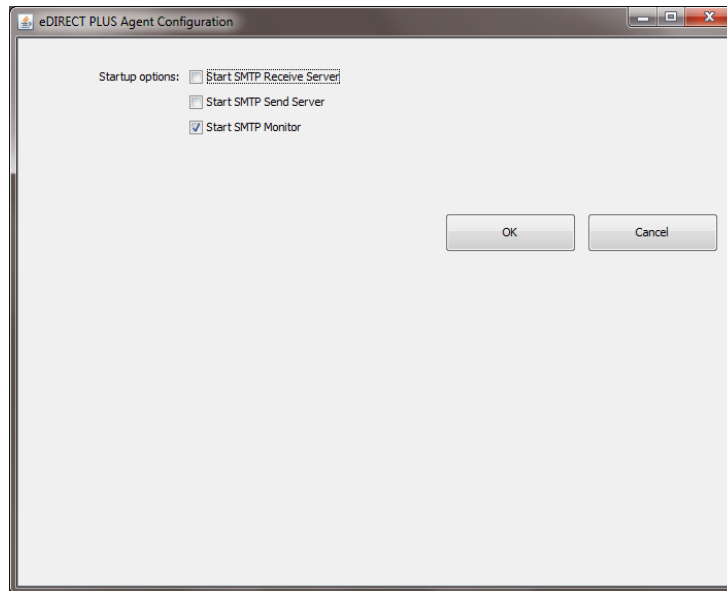
SMTP Monitor Configuration

The SMTP Monitor is used to capture outgoing email messages for enhancement by an eFORMz project. It receives messages on an arbitrary port and then copies that data to a new file.

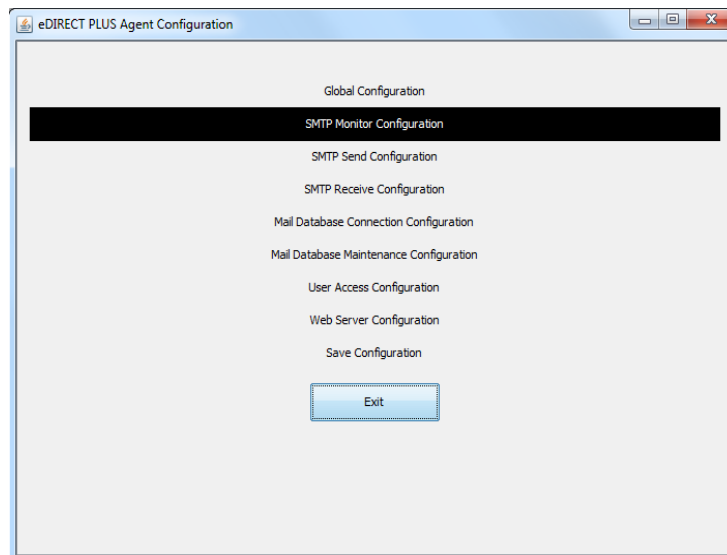
1. From the eDIRECT+ Agent Configuration Menu, select Global Configuration option.



2. Set the SMTP Monitor to start by checking the Start SMTP Monitor option. Click OK to return to the eDIRECT+ Agent Configuration Menu.



3. Next, select the SMTP Monitor Configuration option.



4. The SMTP Monitor Ports dialog box will display. Select Add to add a new port.
5. The SMTP Monitor Port Configuration dialog box will display.

The screenshot shows the 'SMTP Monitor Port Configuration' dialog box with the following settings:

- Active
- Name: default
- SMTP Port: 25
- SMTP Bind Address: (empty)
- Mail domain: localhost
- Data Directory: C:\Minisoft\leFORMz_6
- Max threads: 10
- Min threads: 5
- Smart Host: (empty) 25
- Match Strings: (empty)
- Keep Copy
- Buttons: Delete, OK, Cancel

Options:

Active

Activates or deactivates the settings. Default is checked.

Name

The name given to the configuration.

SMTP Port

The SMTP Port is associated with the IP address of the host and the Simple Mail Transfer Protocol used for communication.

SMTP Bind Address

The IP address on the server used for listening. The SMTP Monitor will listen on all available ports if no value is entered. This parameter is important on systems that use another mail server also listening on the configured port.

Mail Domain

An arbitrary text string used to identify this system to a mail client. It is used primarily for testing.

Data Directory

The directory into which the received mail files will be stored.

MaxThreads

Limit on the number of simultaneous receives (*default 10*).

Min Threads

Smallest number of receivers started (*default 5*).

Smart Host

Address and Port number of a mail server to which messages are forwarded if they do not match on one of the (regex-based) search strings. If the Smart Host parameter is blank, all messages are kept locally.

Match Strings

Strings using regular expressions (regex) to match on for local storage. Those messages that do not match are sent to the Smart Host.

Keep Copy

Option used to keep a local copy of messages that are sent to a Smart Host. Default is unchecked.

6. Make any necessary changes to the fields. For example, in the Match Strings field, enter a regular expression to match on certain information, such as an email subject.

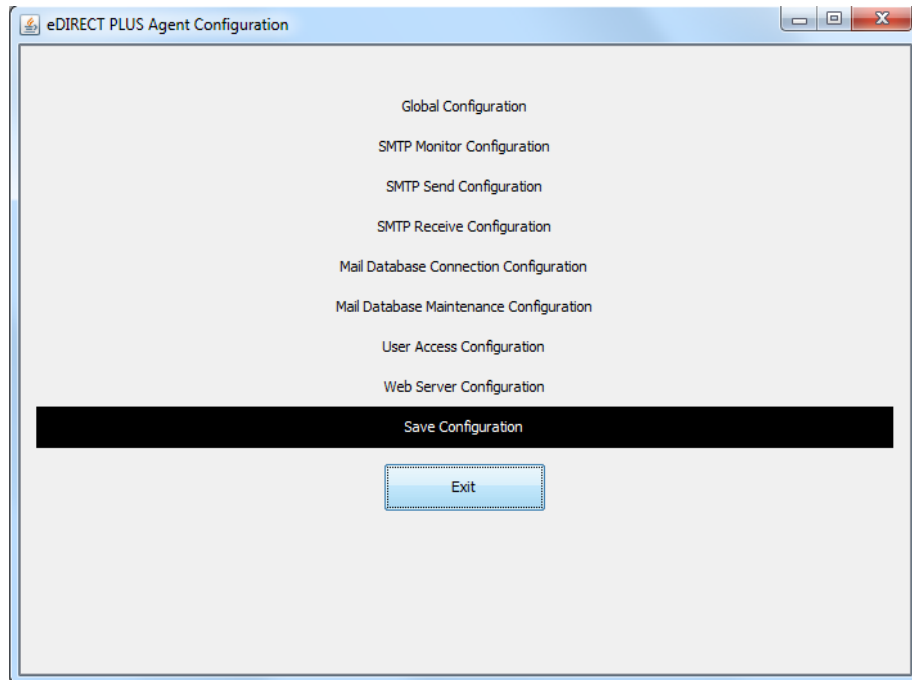
The screenshot shows the 'eDIRECT PLUS Agent Configuration' dialog box. It has a title bar with standard window controls. The main area contains the following fields and options:

- Active
- Name: default
- SMTP Port: 25
- SMTP Bind Address: (empty)
- Mail domain: localhost
- Data Directory: C:\Minisoft\eFORMz_6\Projects\Input\Emails
- Max threads: 10
- Min threads: 5
- Smart Host: 123.45.67.8 (with a port field set to 25)
- Match Strings: ^Subject ()+Dear{, :}
- Keep Copy






At the bottom of the dialog are three buttons: Delete, OK, and Cancel.

NOTE: For help with regular expressions there are multiple resources that can be accessed online. A basic guide is provided in the Regular Expressions section of this manual. The string in this example would match the beginning of the line that contained the word 'Subject' followed by a blank space, then one or more instances of the word 'Dear' and either a comma or colon after that. So if there is a subject line with the word dear, it will be matched and stored locally. Recall that if the Smart Host parameter is blank then all of the messages are kept locally.

7. Click OK to proceed. To save the configuration, first select Return. From the menu, choose the Save configuration option. The default configuration will be updated.



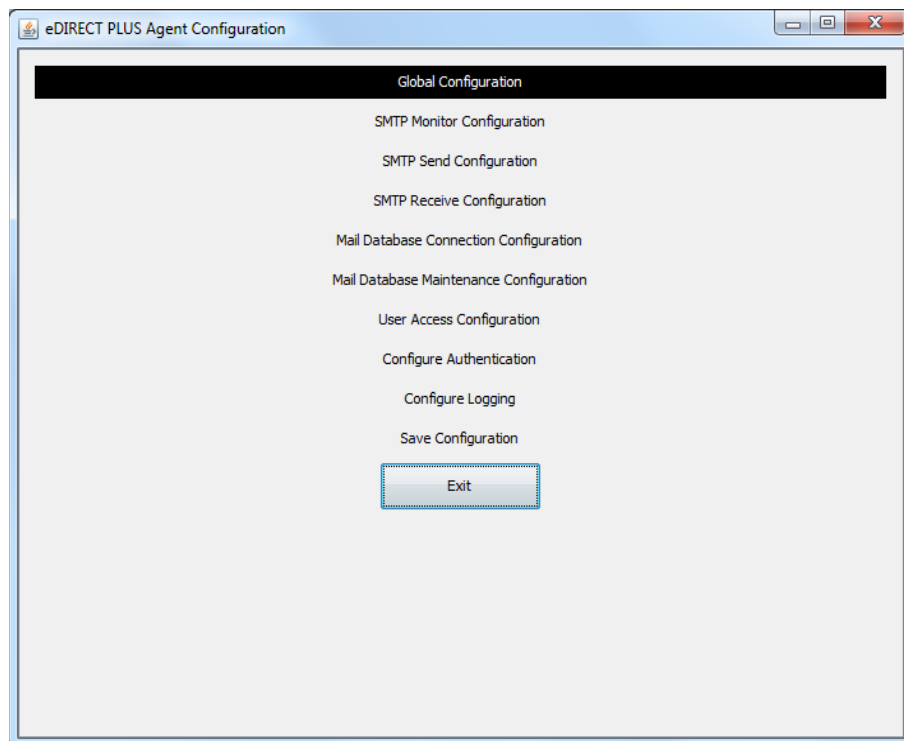
By default the files being stored in the specified data directory will contain the extension .mbx. Once the .mbx files have been created and placed in the specified directory, the next step is to use the files for an eFORMz project file transformation.

Name	Date modified	Type	Size
 201201201527430001	2/20/2012 3:27 PM	MBX File	20 KB
 201201201529510002	2/20/2012 3:29 PM	MBX File	9 KB
 201202011655190017	3/1/2012 4:55 PM	MBX File	6 KB
 201202021046090017	3/2/2012 10:46 AM	MBX File	6 KB
 201202021138290018	3/2/2012 11:38 AM	MBX File	6 KB

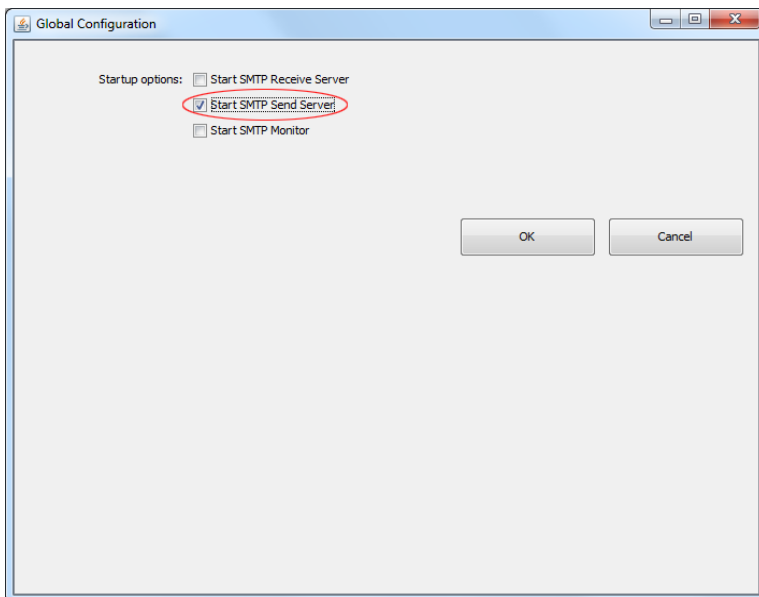
SMTP Send Configuration

The settings of the SMTP Send Service are mostly default values that are used when an eFORMz project file does not supply a value. It is used to transmit email messages to the appropriate destination.

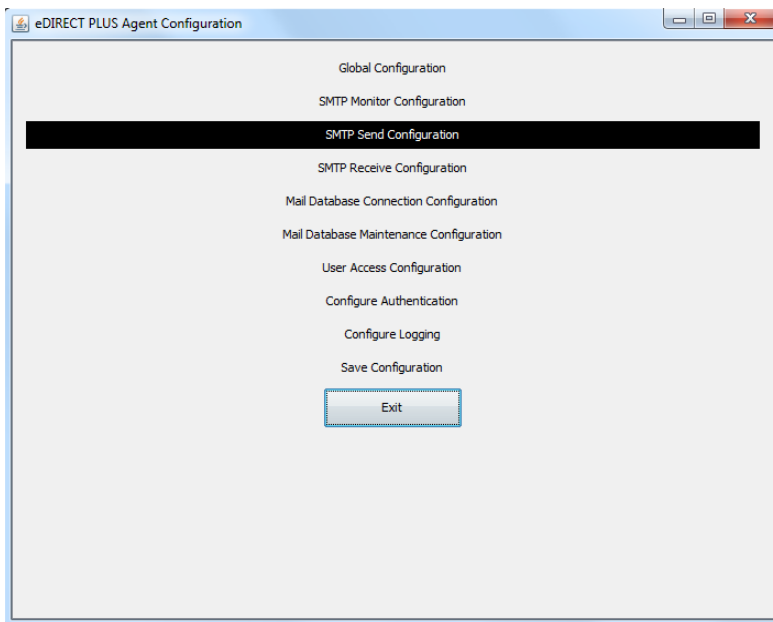
1. From the eDIRECT+ Agent Configuration Menu, select the SMTP Send Configuration option.



2. Set the SMTP Send Server to start by checking the Start SMTP Send Server option. Click OK to return to the eDIRECT+ Agent Configuration Menu.



3. Next, select the SMTP Send Configuration option.



4. The SMTP Send Configuration dialog box will display.

The screenshot shows a dialog box titled "SMTP Send Configuration". It contains the following fields and controls:

- Server address: [Empty text box]
- Port: [25]
- Max threads: [25]
- Min threads: [5]
- Server options: Requires login authentication
- User: [Empty text box]
- Password: [Empty text box]
- Sender address: [news@minisoft.org]
- Test recipients: [test@minisoft.com]
- Transport Host: [localhost]

At the bottom of the dialog are three buttons: "Send test E-Mail", "OK", and "Cancel".

Options:

Server Address

The Server Address is the default address of the SMTP server through which to send SMTP messages.

Port

The default port of the SMTP server through which to SMTP messages are sent.

Max Threads

Limit on the number of concurrent processes. More threads allow sending to continue while one thread is busy incurring little additional overhead.

Min Threads

Smallest number of concurrent processes.

User

The name of the user on the host server. It is used to authenticate the message that should be sent through the host server.

Password

The user password on the host server that is used to authenticate the message that should be sent through the host server.

Sender Address

This is the default from address for messages. This is typically modified in an eFORMz project.

Test Recipients

Email address(es) used to test the transport.

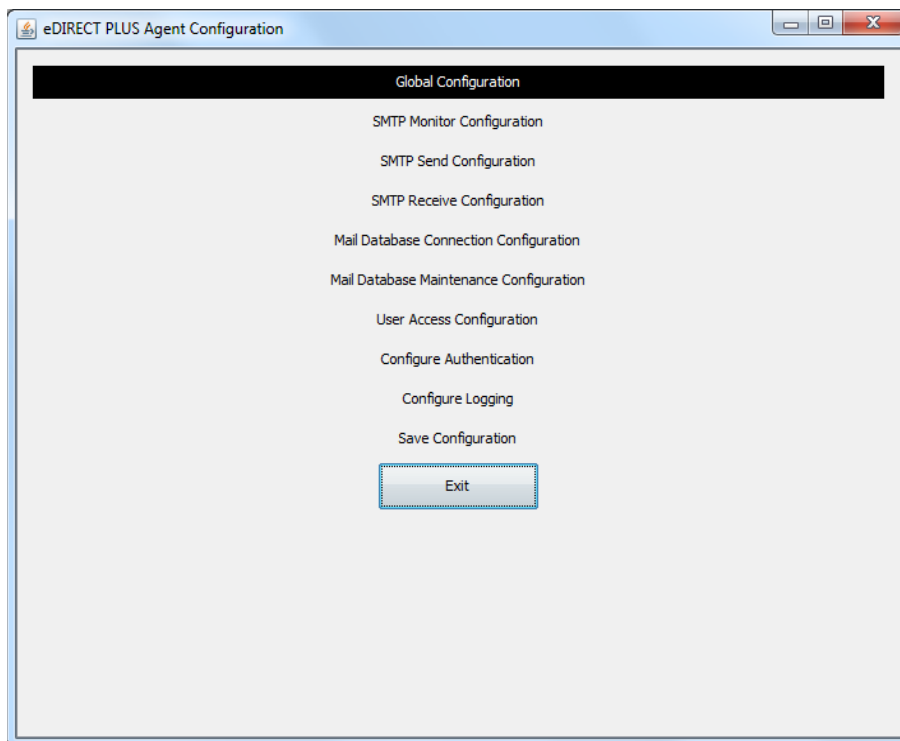
Transport Host

The Transport Host is the name used with the remote, or recipient server in the SMTP conversation to identify the host server name.

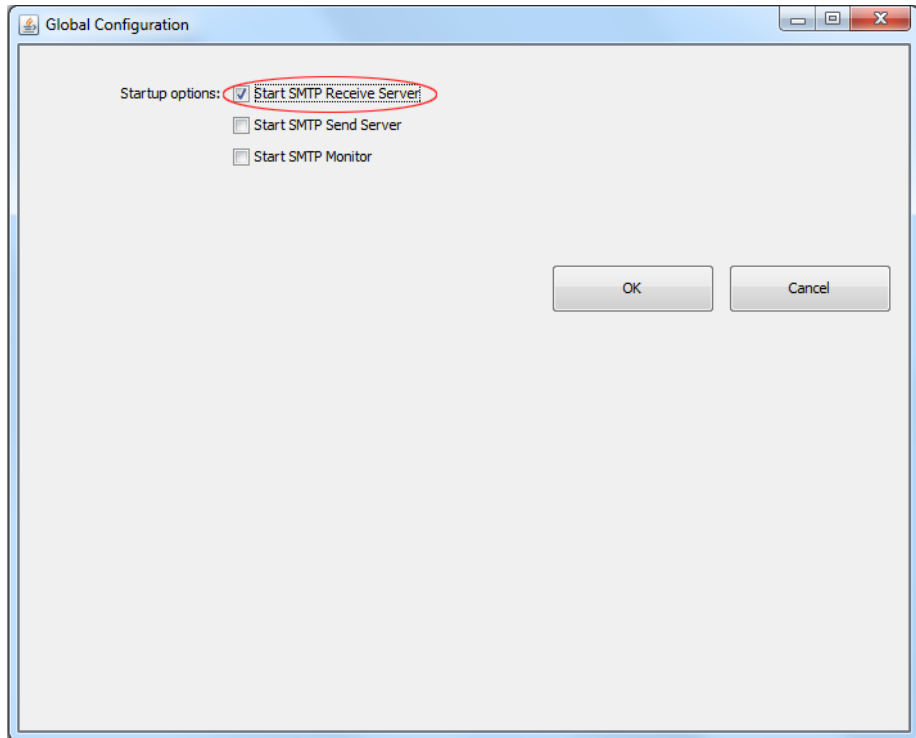
SMTP Receive Configuration

The SMTP Receive service primarily listens for incoming messages, such as Delivery Status Notifications. By extension, it also supports the Response Tracking module inside eDIRECT+.

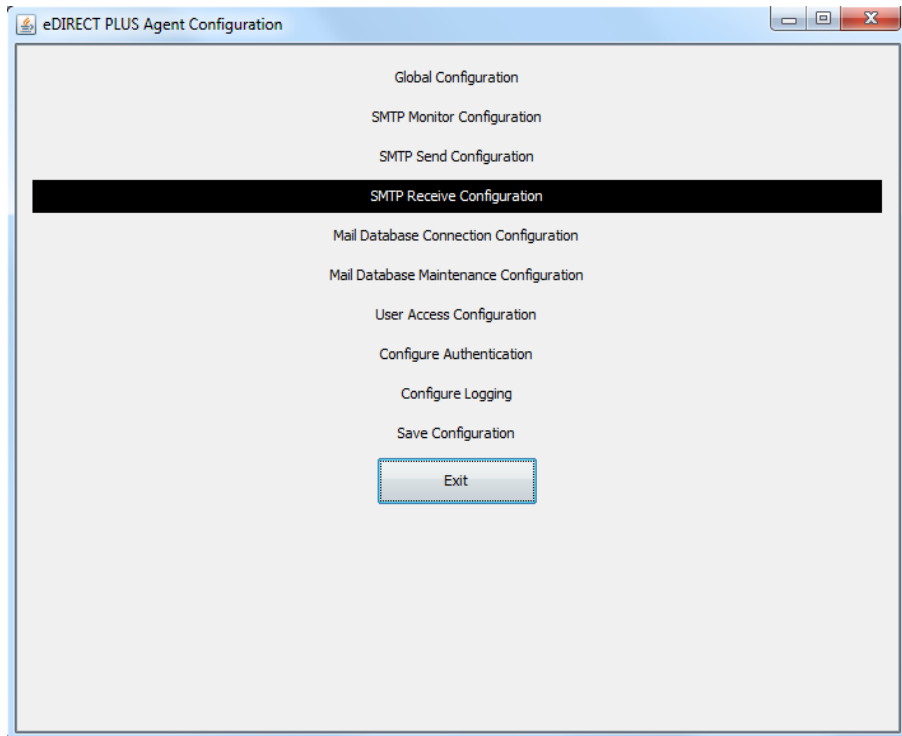
1. From the eDIRECT+ Agent Configuration Menu, select the SMTP Receive Configuration option.



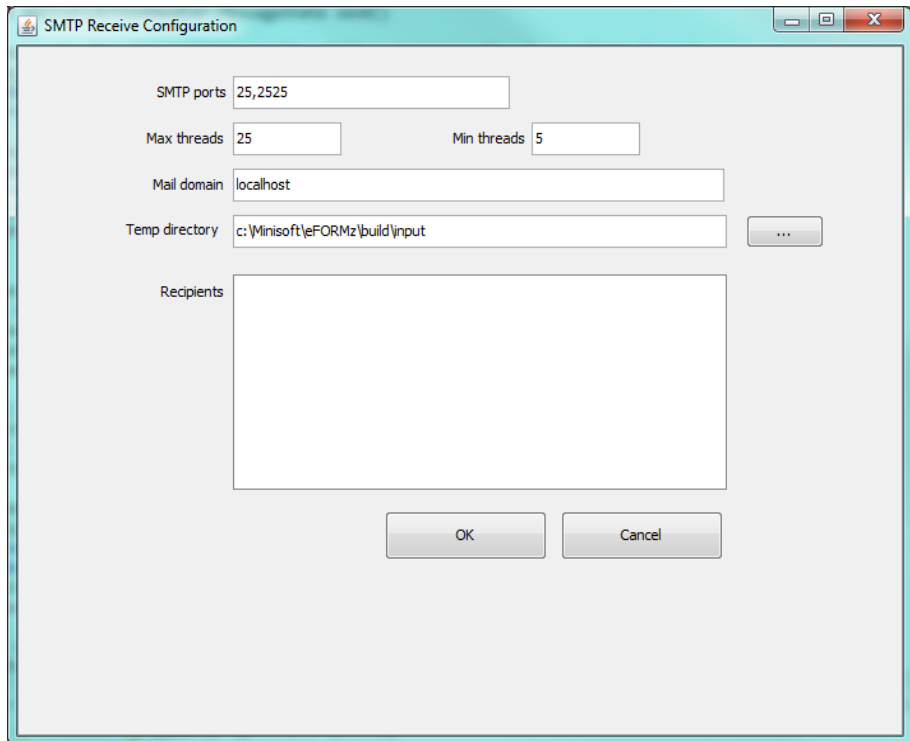
2. Set the SMTP Receive Server to start by checking the Start SMTP Receive Server option. Click OK to return to the eDIRECT+ Agent Configuration Menu.



3. Next, select the SMTP Receive Configuration option.



4. The SMTP Receive Configuration dialog box will display.



The screenshot shows a dialog box titled "SMTP Receive Configuration". It contains the following fields and values:

- SMTP ports: 25,2525
- Max threads: 25
- Min threads: 5
- Mail domain: localhost
- Temp directory: c:\microsoft\efORMz\build\input
- Recipients: (empty text area)

Buttons for "OK" and "Cancel" are located at the bottom of the dialog.

Options:

SMTP Ports

A port or ports on which to listen for new email messages.

Max Threads

Limit on the number of concurrent processes. More threads allow receiving to continue while one thread is busy incurring little additional overhead.

Min Threads

Smallest number of concurrent processes.

Mail Domain

The server name that is reported to sending servers.

Recipients

List of valid recipient names for this service. Messages received that do not match any of the listed entries will be rejected and the host may be black listed.

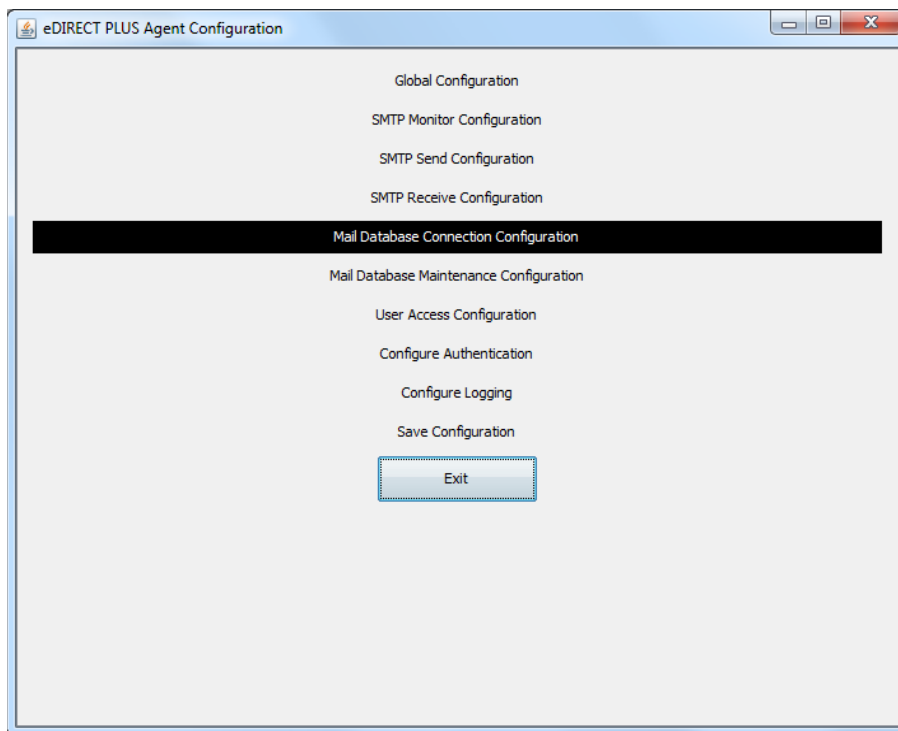
Temp Directory

Refers to the location which stores message files for further processing or review.

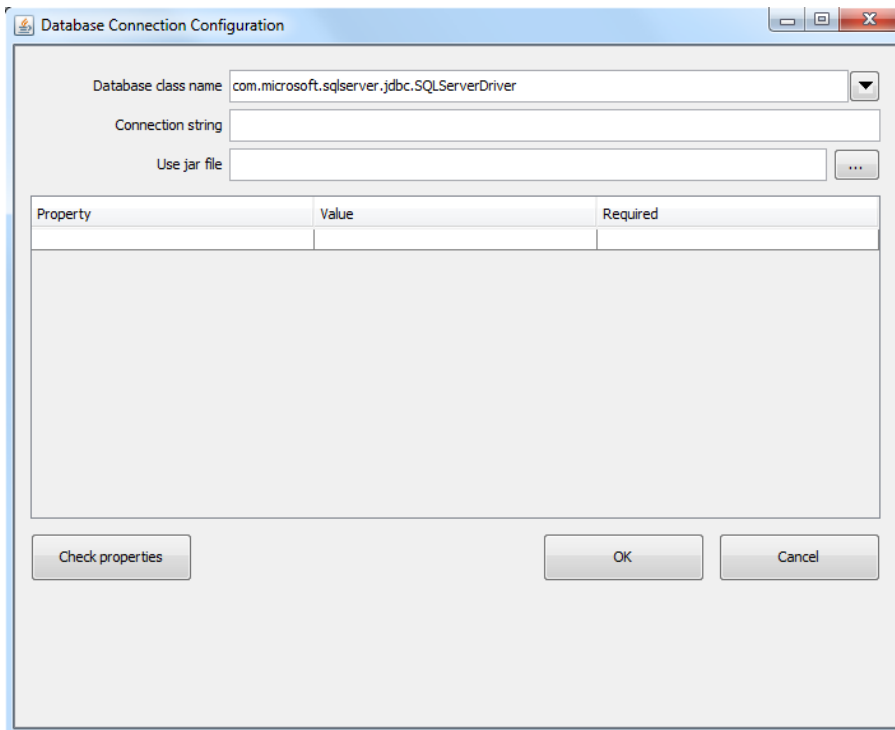
Mail Database Connection Configuration

The Mail Database Connection implements a connection to a database for storing messages.

1. From the eDIRECT+ Agent Configuration Menu, select the Mail Database Connection Configuration option.



- The Database Connection Configuration dialog box will display.



Options:

Database Class Name

The class name for the JDBC connection to be used. There are two configured connections: `com.microsoft.sqlserver.jdbc.SQLServerDriver` and `com.mysql.jdbc.Driver`.

Connection String

The JDBC connection string to the eDIRECT+ Agent Mail Database.

Use Jar File

The optional jar file name if the database class is not statically configured in eFORMz.

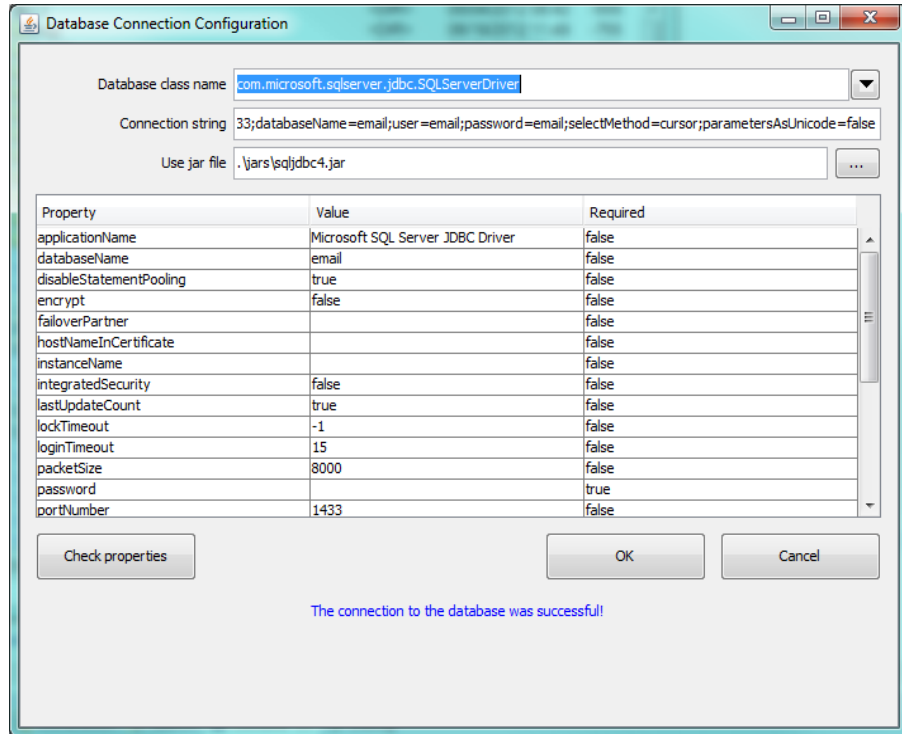
Properties Table

The Property, Value and Required fields are database connection properties that are returned from a successful connection test.

Check Properties

This option will test the database connection and return the default properties if a connection can be made.

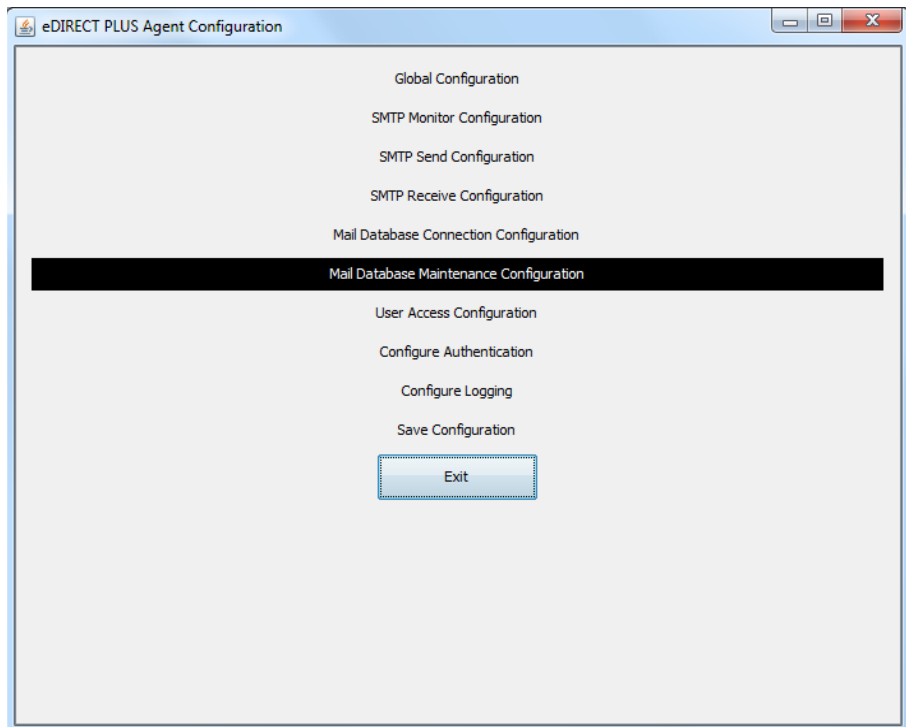
3. Select a Database class name and enter a Connection string. If necessary, add a jar file with the User jar file browse button (...). Select Check properties to verify the connection.



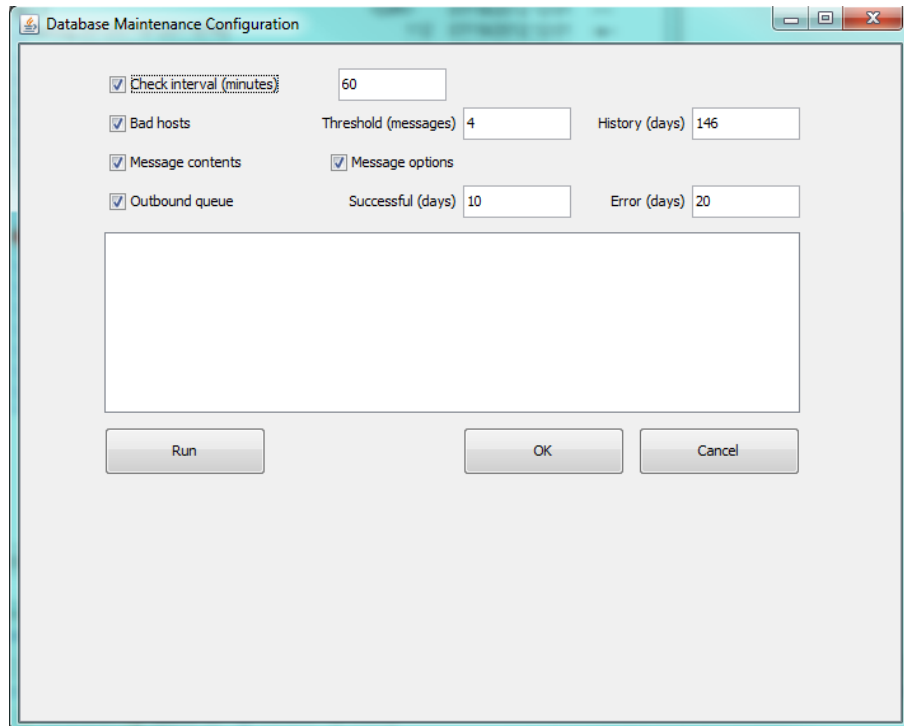
Mail Database Maintenance Configuration

The Mail Database Maintenance controls the background monitoring of the eDIRECT+ Agent Mail Database. It handles the disposition of messages that do not have a specific disposition defined.

1. From the eDIRECT+ Agent Configuration Menu, select the Mail Database Maintenance Configuration option.



2. The Database Maintenance Configuration dialog box will display.



Options:

Check Interval (minutes)

This refers to the frequency that the database is checked for records that can be "cleaned."

Bad Hosts

A method to reduce spam. The SMTP Receive will stop accepting connections from a host that sends [threshold] messages to invalid recipients within the last [history] days.

Message Contexts

Mail transfer agent database table.

Message Options

Mail transfer agent database table.

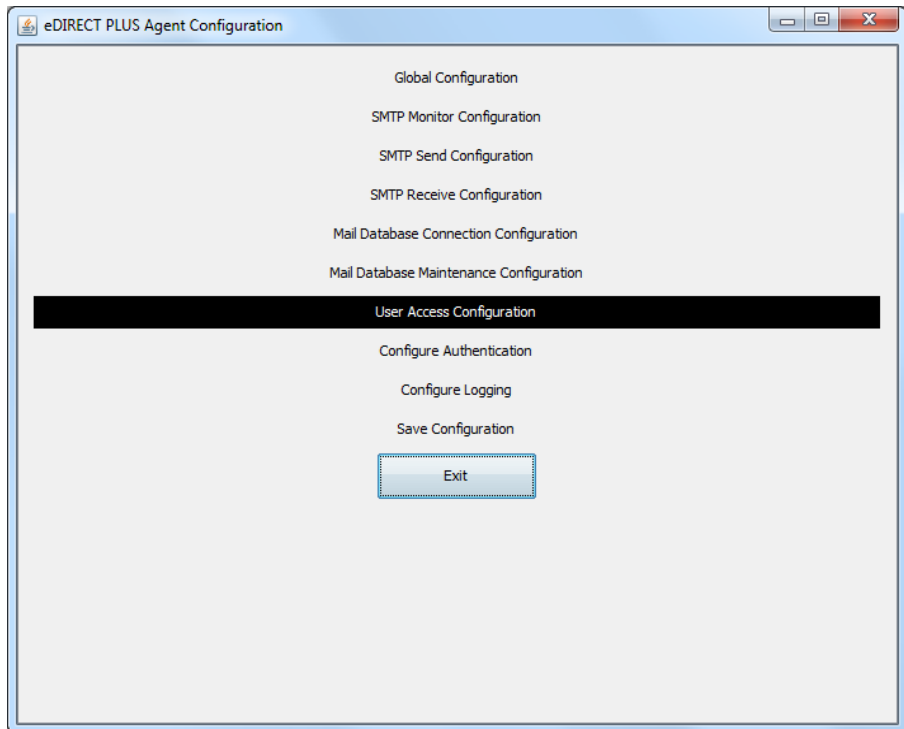
Outbound Queue

Mail transfer agent database table.

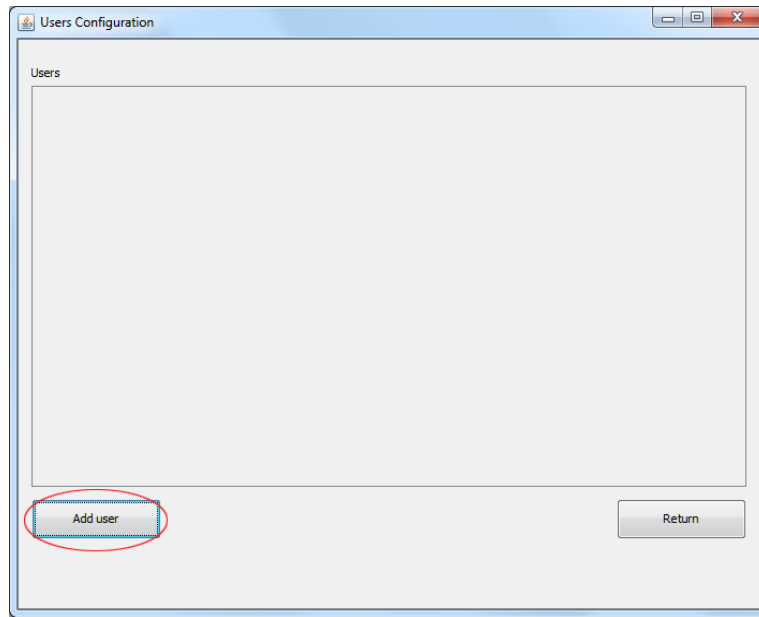
User Access Configuration

The User Access Configuration enables additional users to be added to a particular eDIRECT+ Agent configuration.

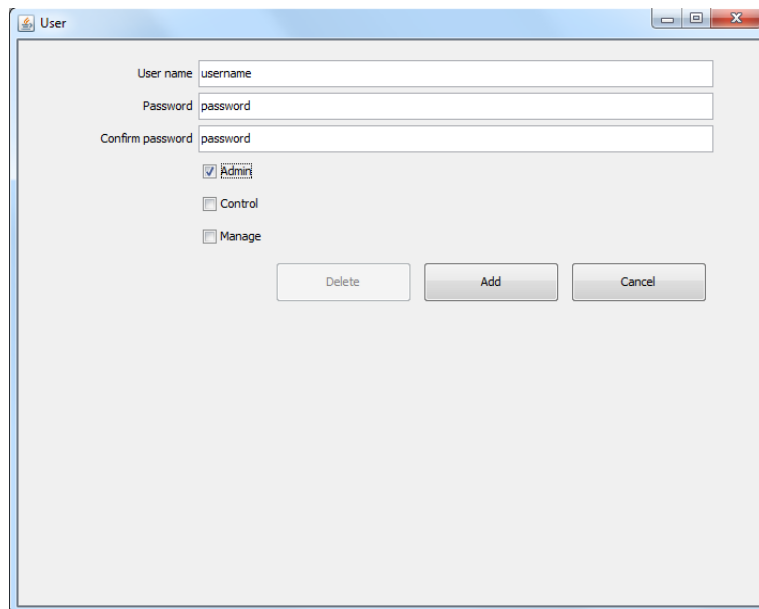
1. From the eDIRECT+ Agent Configuration Menu, select the User Access Configuration option.



2. The Users Configuration dialog box will display. Select the Add user option.



3. The User dialog box will display. Enter the relevant information and click Add to incorporate the new user.



Options:

Admin

This privilege allows the user to control, manage, and configure the eDIRECT+ Agent.

Control

This privilege is required for starting, stopping, or pausing services.

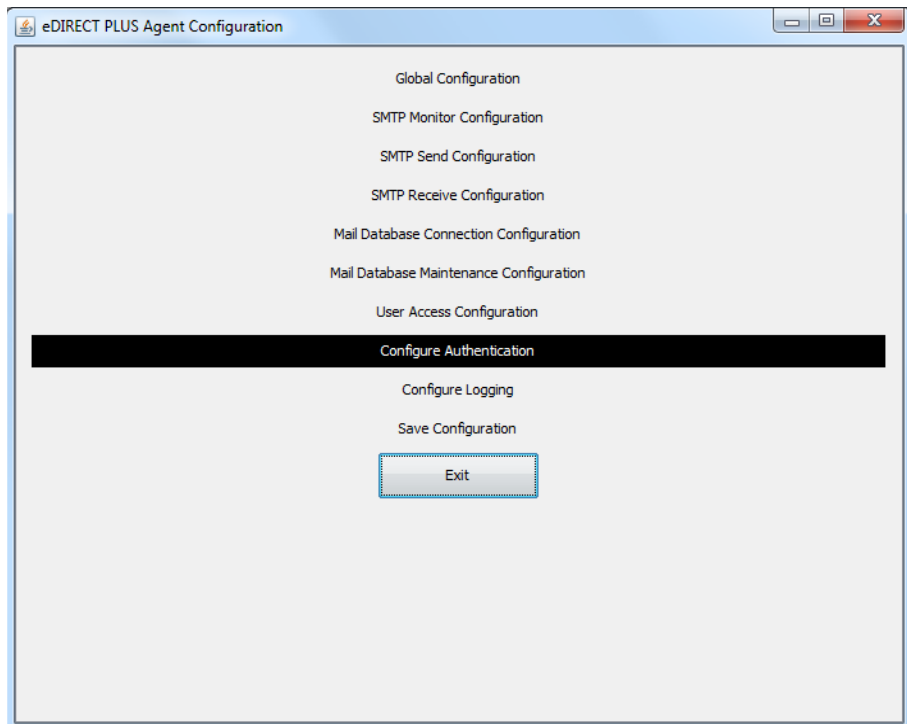
Manage

A user with this privilege may manage the mail queue.

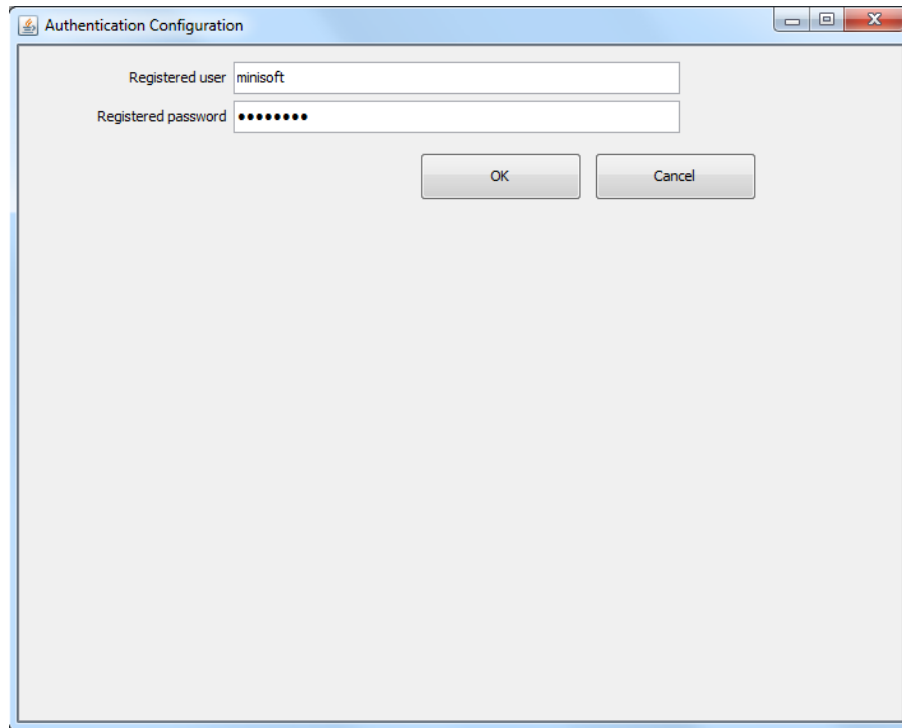
Configure Authentication

The Configure Authentication sets the user and password values for the Authentication dialog box.

1. From the eDIRECT+ Agent Configuration Menu, select the Configuration Authentication option.



2. The Authentication Configuration dialog box will display.

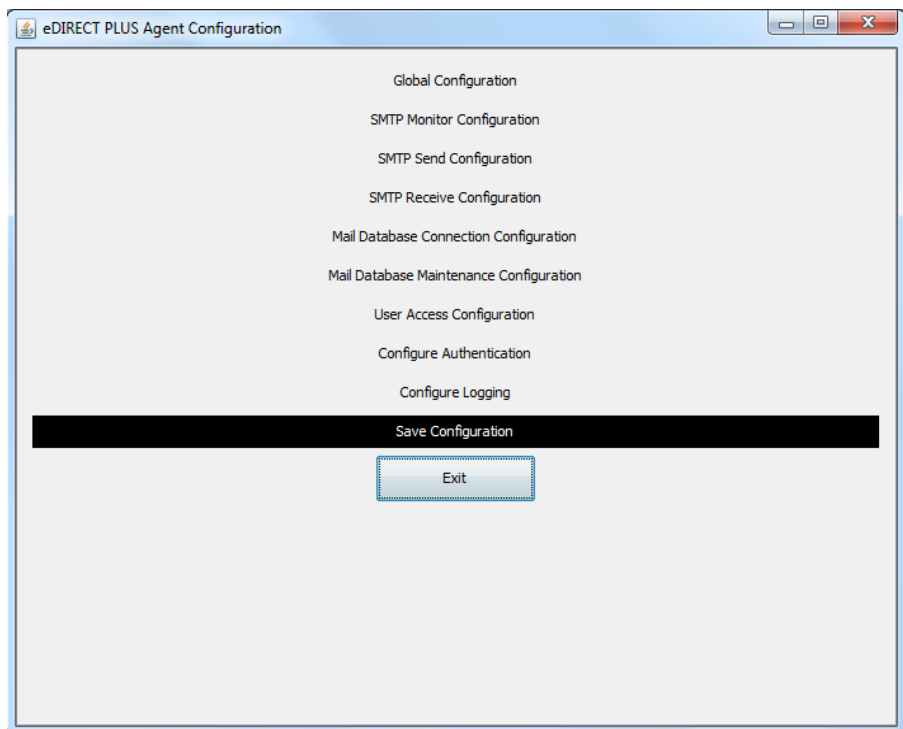


Configure Logging

The Configure Logging option allows the user to set the logging activity for eDIRECT+ Agent processes. For more on eDIRECT+ Agent logging, and logging with the eFORMz 9.0 suite of products, consult the *Logging Mini-Manual*.

Save Configuration

1. From the eDIRECT+ Agent Configuration Menu, select the Save Configuration option to save any changes made to the eDIRECT+ Agent Configuration.



eDIRECT+ Agent Management

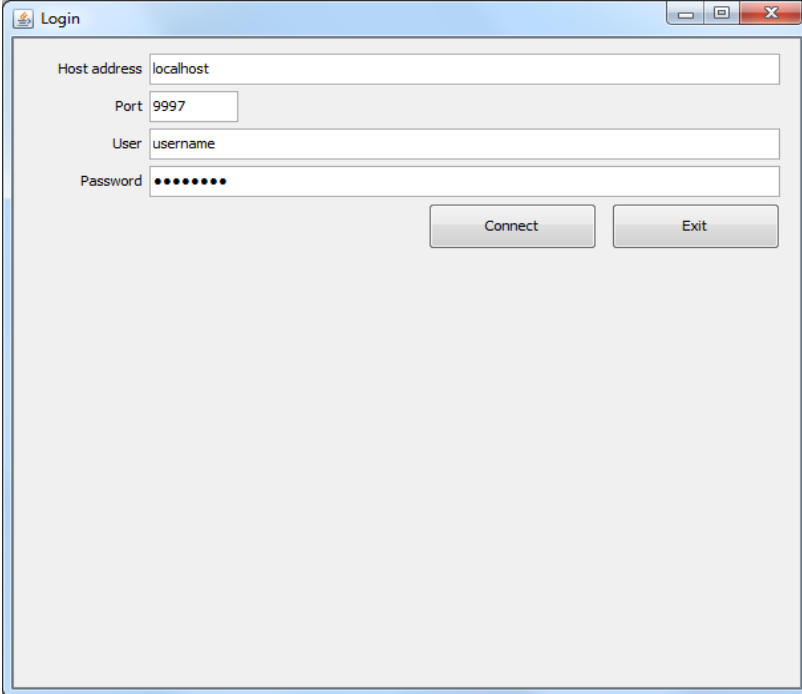
The eDIRECT+ Agent is the service that handles the sending and receipt of email messages. The service is normally a background process without a user visible component (i.e. Windows Service). The service may be started and stopped with the usual operating system controls. The use of the eDIRECT+ Agent Control Application allows for additional control and detailed monitoring of the service while it is running.

Control Settings

1. To manage the eDIRECT+ Agent, run the eDIRECT+ Agent Control Application at C:\Minisoft\eFORMz_6\eDP_Control.
2. Once open, the eDIRECT+ Agent Management dialog box will display. Click OK to proceed.



3. Enter the Host address, User and Password. The default User is username and the default Password is password. These can be updated with the settings.xml file in the eFORMz directory (C:\Minisoft\eFORMz_6\settings.xml).



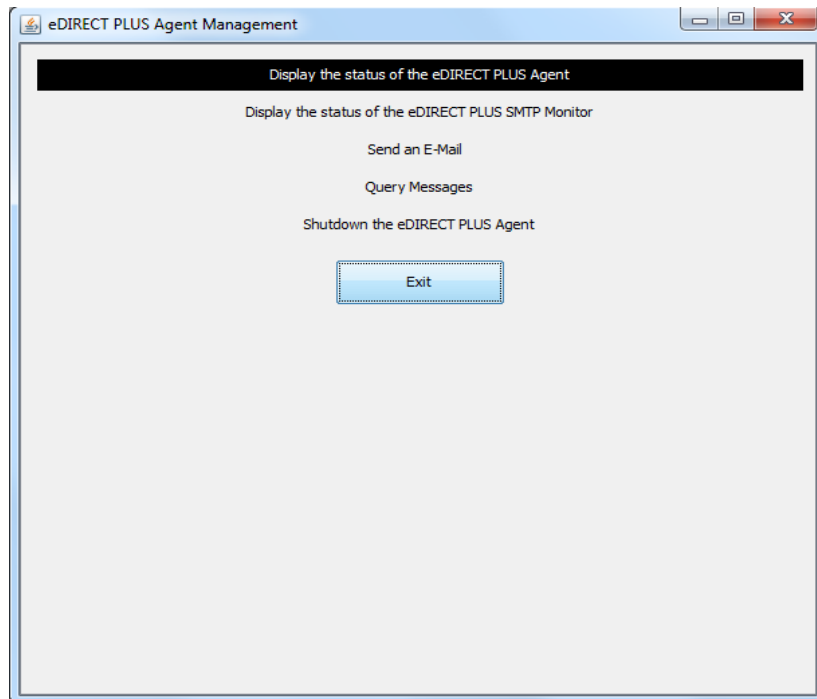
The screenshot shows a 'Login' dialog box with the following fields and buttons:

- Host address: localhost
- Port: 9997
- User: username
- Password: ••••••••
- Buttons: Connect, Exit

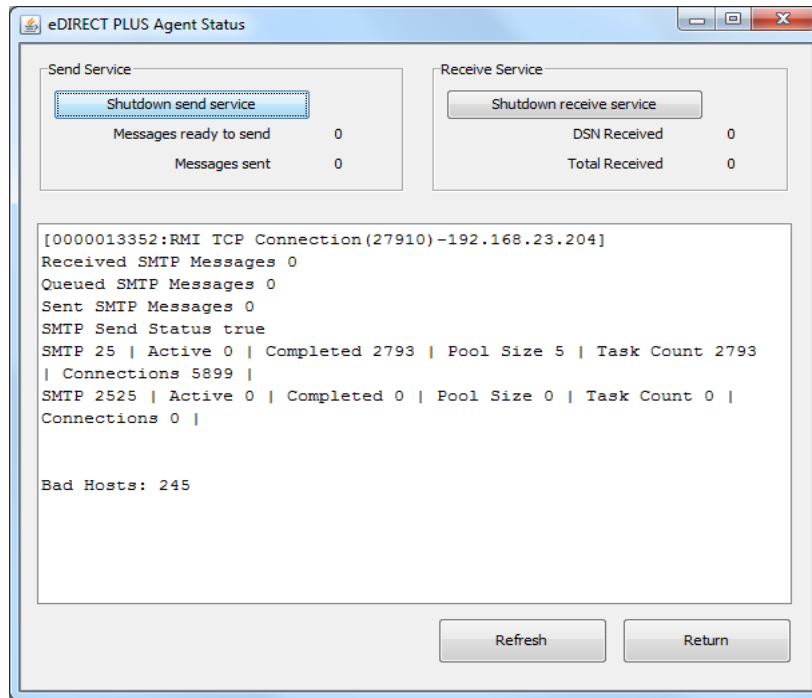
Display the Status of the eDIRECT+ Agent

The Display the Status of the eDIRECT+ Agent window shows the state of the SMTP send and receive components. It also allows each component to be started and stopped individually.

1. From the eDIRECT+ Agent Management Menu, select the Display the Status of the eDIRECT+ Agent option.



- The eDIRECT+ Agent Status will display.



Options:

Send Service

The SMTP Send service reads the message queue and transports the emails to the recipient mail servers.

Receive Service

The SMTP receive service is used to identify and sort incoming email messages. It uses a variety of search techniques to determine which outgoing message is related to each received message. Received messages include delivery status notifications, vacation notices, replies, and other information regarding the recipient.

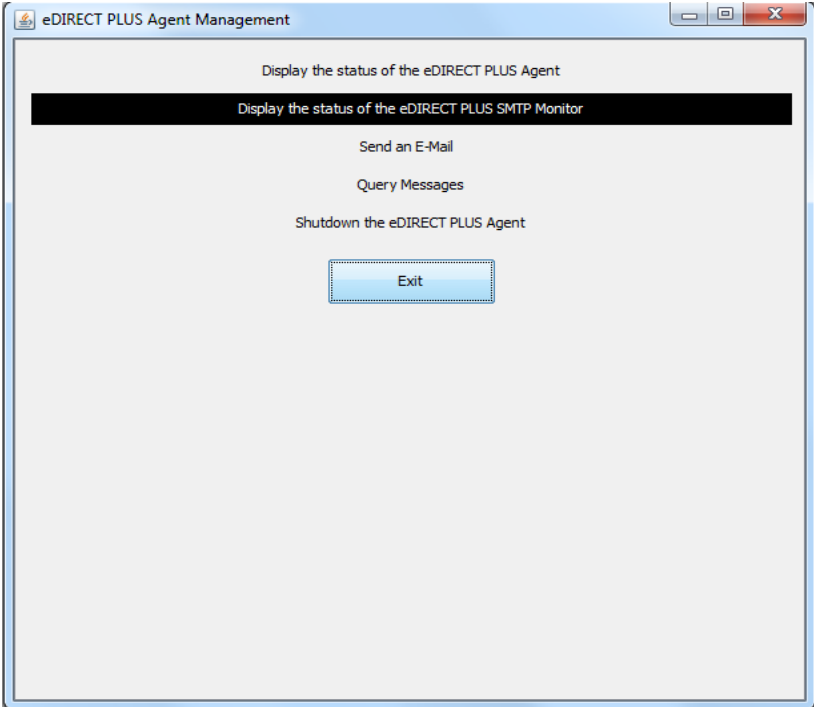
Status Window

Details used by Minisoft support, often used to optimize run-time parameters.

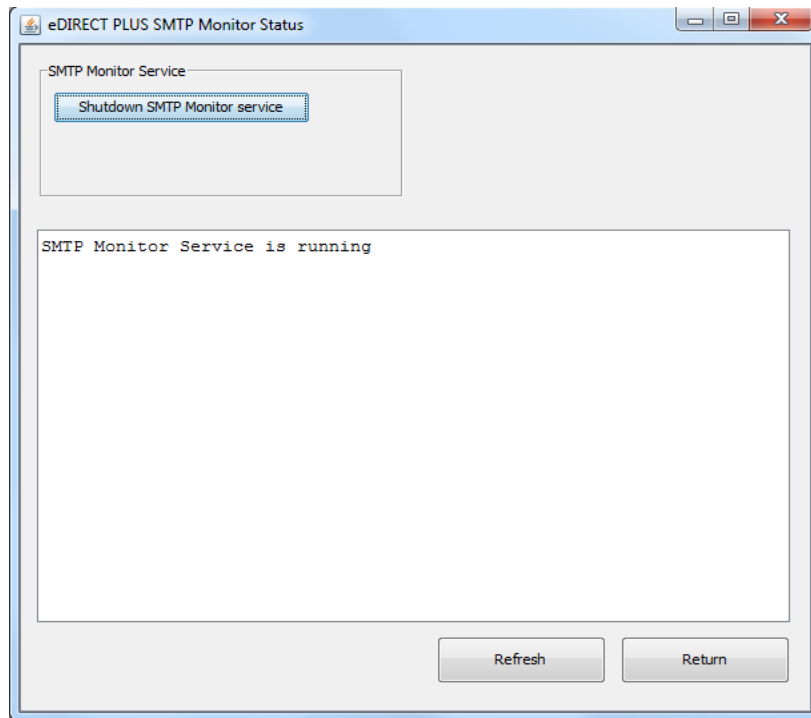
Display the Status of the eDIRECT+ SMTP Monitor

The Display the Status of the eDIRECT+ SMTP Monitor window shows the status of the SMTP Monitor service.

1. From the eDIRECT+ Agent Management Menu, select the Display the Status of the eDIRECT+ SMTP Monitor option.



2. The eDIRECT+ Agent Status will display.



Options:

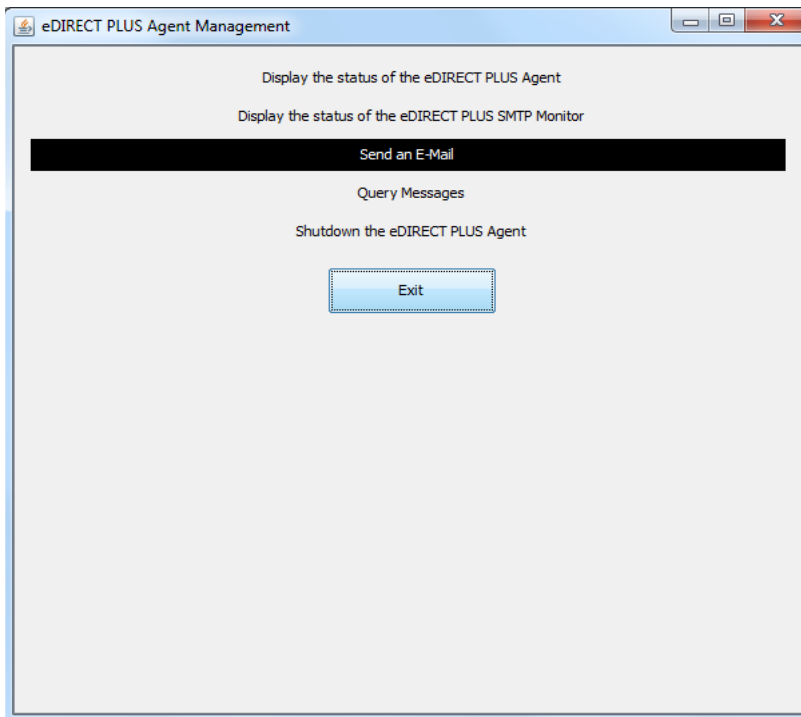
SMTP Monitor Service

Indicates whether the SMTP Monitor is running or not.

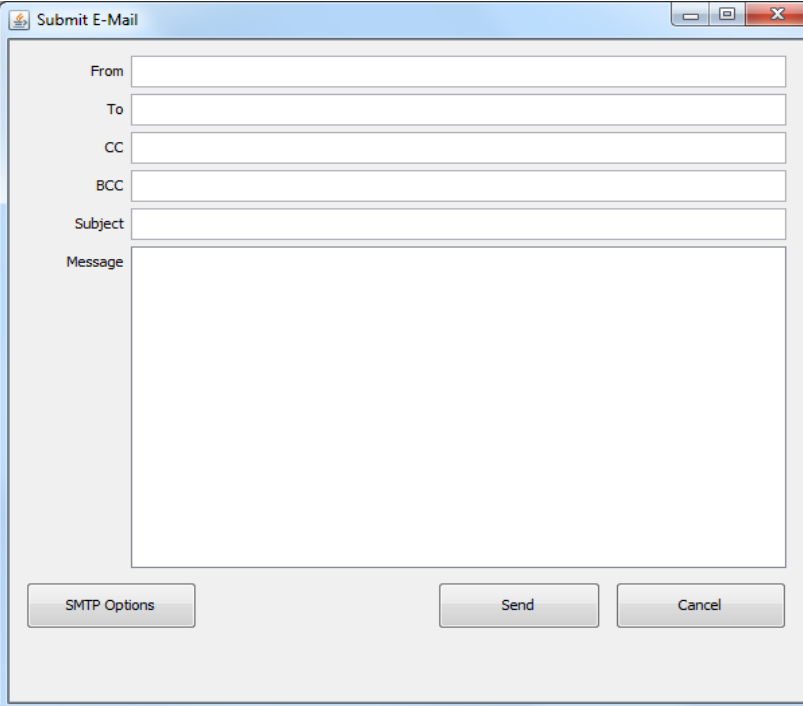
Send an E-Mail

The Send an E-Mail option allows the user to provide values that will override the defaults set for the SMTP Send Service. These options are available in each instance of an eFORMz project.

1. From the eDIRECT+ Agent Management Menu, select the Send an E-Mail option.



2. The Submit E-Mail dialog box will display. To edit the SMTP options, select the SMTP Options button in the bottom left of the screen.



The image shows a 'Submit E-Mail' dialog box with the following fields and buttons:

- From: [Text Input]
- To: [Text Input]
- CC: [Text Input]
- BCC: [Text Input]
- Subject: [Text Input]
- Message: [Large Text Area]
- SMTP Options: [Button]
- Send: [Button]
- Cancel: [Button]

Options:

From

An email address that designates who the email is from.

To

An email address that designates the recipient of the email.

CC

An email address for CC recipients.

BCC

An email address for BCC recipients.

Subject

The subject of the email.

Message

The body of the email.

3. The SMTP Test Message Server dialog box will display.

Options:

SMTP Host

The SMTP Host refers to the address of the SMTP server through which the SMTP message is sent.

Port

The SMTP server port.

Authentication Required

If enabled, enter the user and password to connect to the SMTP Host.

Read Receipt Requested

When enabled, it will send Delivery Status Notification to the SMTP Receive stating that the message was read. The recipient may opt not to send the DSN.

Send Notification Requested

When enabled, it will send Delivery Status Notification to the SMTP Receive stating that the send notification was received. The recipient may opt not to send the DSN.

Request Full Notification

When enabled, it will send Delivery Status Notification to the SMTP Receive stating that a full notification was received. The recipient may opt not to send the DSN.

Importance

Options include: Normal, High and Low.

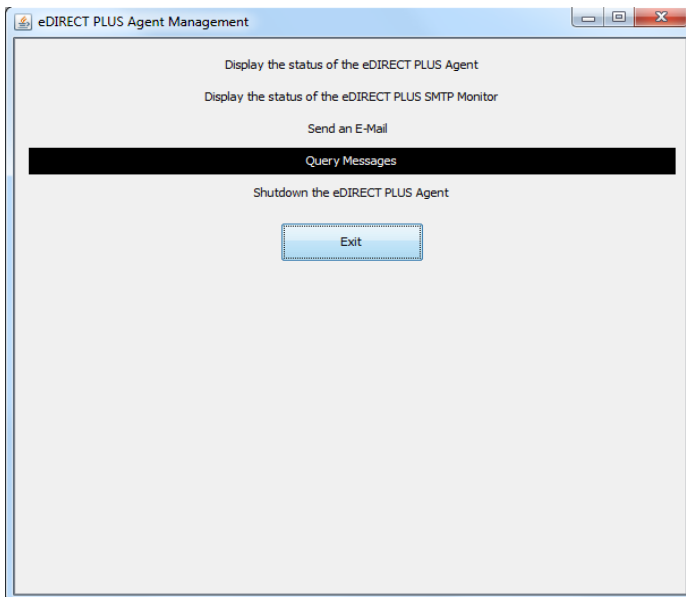
Sensitivity

Options include: Normal, Personal, Private and Confidential.

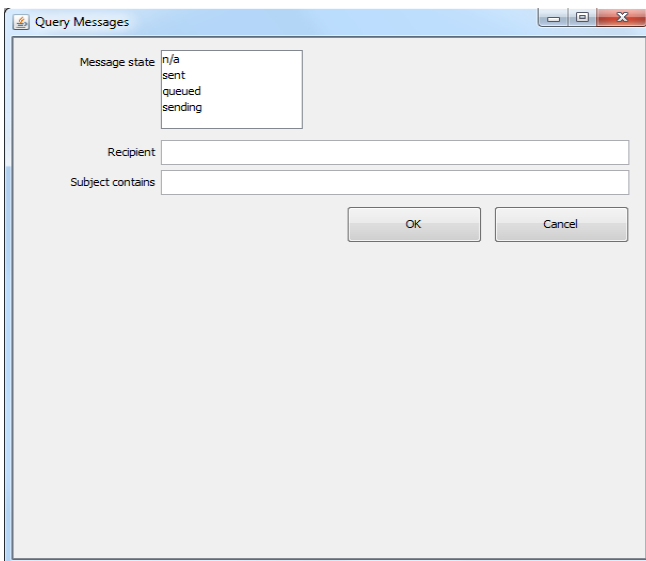
Query Messages

The Query Messages option allows

1. From the eDIRECT+ Agent Management Menu, select the Query Messages option.



2. The Query Messages dialog box will display.



Options:

Message State

The message state to query. Options include n/a, sent, queued and sending.

Recipient

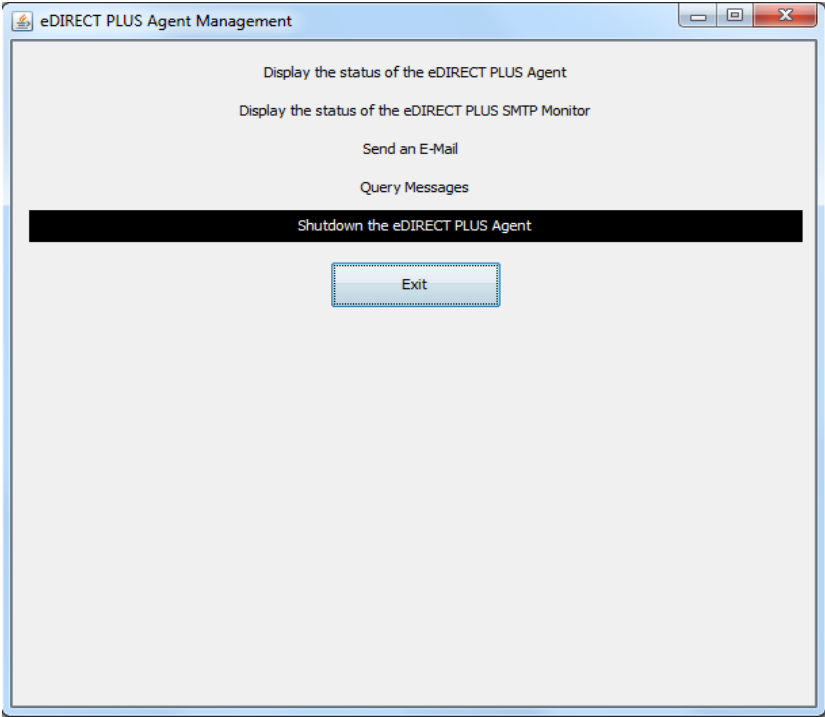
Specifies the 'TO:' address to query.

Subject Contains

Defines the subject to query.

Shutdown the eDIRECT+ Agent

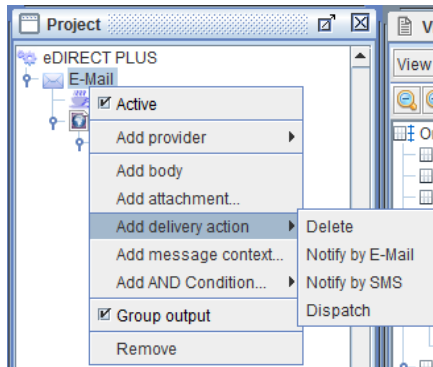
1. To shut down the eDIRECT+ Agent, select the Shutdown the eDIRECT+ Agent option from the Menu.



Appendices

APPENDIX A: eDIRECT+ Agent Message Disposition Matrix

Messages are stored at the time that they are created. The amount of time they remain stored is configured as the disposition. There are several actions that can be taken on a stored message. The action(s) will occur related to the state that they are in and the length of time in that state. As an example, a message can be configured to be deleted seven days after a successful transmission. Message dispositions are configured from the eDIRECT+ tab of the eFORMz Composer:



Delivery Actions

The following list includes actions that may be taken on a message state.

Delete

The "Delete" action will remove the message from the Mail Database.

Notify

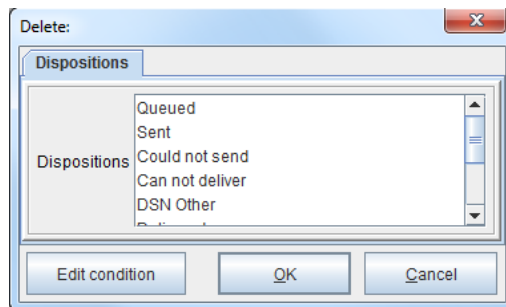
The “Notify” action can send a notification or a status history.

Dispatch

The “Dispatch” action will return the message to eFORMz for further action.

Dispositions

Listed below are possible states that could apply to a message. Changes to message states are where a disposition action can be configured to occur.



Queued

“Queued” is the initial state of messages when they are received by the eDIRECT+ Agent Service.

Sent

The “Sent” state is set for a message when the SMTP Send service receives a “successful” status from the recipient’s email server.

Could not send

The “Could not send” state is set for a message when the SMTP Send service receives a “failure code 5xx” status from the recipient’s email server. This could also be set if the SMTP Send cannot be opened, if there is no MX record for the recipient’s domain or if

code 4xx delays are past the configured expiration time.

Cannot deliver

After a message is sent, there may be a delayed reply from a mailer daemon in the recipient's mail server chain. This occurs when an intermediate server accepts the message in a store-and-forward configuration but it unable to complete the send to the recipient's inbox. While a "Cannot deliver" message could arrive at any time, it is commonly ignored if the message is in the Sent state for 24 hours.

Delivered

This is a Delivery Status Notification (DSN) that will return a "Delivered" message. If configured, it is returned to the sender by the recipient's local email server or client.

Undelivered

This is a Delivery Status Notification (DSN) that will return an "Undelivered" message. If configured, it is returned to the sender by the recipient's local email server or client.

Read

This is a Delivery Status Notification (DSN) that will return a "Read" message. If configured, it is returned to the sender by the recipient's local email server or client.

Reply

A "Reply" message indicates that a message was received that had the message ID of a previously "Sent" message.

APPENDIX B: The SMTP Monitor & Regular Expressions

The following is a basic reference guide for using regular expressions, which are a standard way of finding text using character sequences. The SMTP Monitor processes regular expressions for matching strings. Data is examined and matched in accordance with the given specifications of a regular expression. The Text to XML preprocessor also makes use of regular expressions.

Regex Engine

The regex engine used is from the Java Class *java.util.regex.Pattern*. While the syntax of this class has remained unchanged from Java 1.4 through 7, using the documentation for the JRE that is being employed is recommended.

Anchors

Anchors specify a position in a string where a match must occur. An anchor that is used in a regular expression will not advance through the string or consume characters. Instead, it looks for a match in the specified position only. For example, `^` specifies that the match must start at the beginning of a line or string.

<code>^</code>	Start of a line
<code>\A</code>	Start of an input string
<code>\$</code>	End of a line
<code>\Z</code>	End of an input string

Character Classes

A character class defines a set of characters, any one of which could occur in an input string for a match to succeed.

<code>\c</code>	Control character
<code>\s</code>	White space
<code>\S</code>	Not white space.
<code>\d</code>	Digit.
<code>\D</code>	Not digit.
<code>\w</code>	Word.
<code>\W</code>	Not word.

Quantifiers

Quantifiers specify the number of instances a character or character class must be present in the input for a match to be found. Quantifiers can be greedy or lazy. Greedy quantifiers match as many occurrences of a particular pattern as possible. Appending the ? character to a quantifier makes it lazy, which will match as few occurrences as possible.

<code>*</code>	0 or more. Example: <code>X*</code> is X zero or more times
<code>*?</code>	0 or more (lazy)
<code>+</code>	1 or more
<code>+?</code>	1 or more (lazy)

?
 0 or 1
 ??
 0 or 1 (lazy)
 {}
 Exact number. Example: {3} is exactly 3
 {3,}
 3 or more
 {3,5}
 3, 4 or 5
 {3,5}?
 3, 4 or 5 (lazy)

Special Characters

When the search for a match requires something more than a direct match on position, text or a digit, the pattern includes special characters.

\
 Escape character
 \n
 New line
 \r
 Carriage return
 \t
 Tab
 \v
 Vertical tab
 \f
 Form feed

Ranges (Inclusive)

Grouping constructs capture the substrings of an input string, or a specified range from the string.

- Any character except a new line (\n)
- (a|b)
a or b.
- [...]
Group
- [abc]
Range (a or b or c)
- [^abc]
Not a or b or c
- [a-q]
Letter between a and q
- [A-Q]
Upper case letter between A and Q
- [0-7]
Digit between 0 and 7

Sample Patterns

Listed here are some common regular expressions for matching strings with the SMTP Monitor. Note that all expressions are case-sensitive.

(Subject) or Subject

This basic pattern will pick up any instance of the word 'Subject.'

This is typically used to match the subject line string of an email confirmation or notification, which contains the word 'Subject.' The parentheses are optional but it is case-sensitive.

^Subject[:]()+Your

If the subject line string contains 'Subject: Your Order:' this expression can be used to match the input. The expression states that the instance of Subject at the beginning of a string, followed by a colon, then a blank space and one or more instances of Your will be matched.

.Subject[:]()+Your

If the subject line text characters are not at the very beginning of a string, then simply replace the '^' boundary marker with a '.' grouping construct.

This expression states that for any character except a new line that contains Subject, followed by a colon, then a blank space and one or more instances of Your will be matched. The subject line picked up contains 'Subject: Your Order.'

.Order()+Number[:]

This expression will match the input string for 'Order Number:' that represents the order number information. This regular expression will match any character except a new line that contains Order, followed by a blank space and one or more instances of Number, followed by a colon.

.oog2ol or .()oog2ol

Often, both shipping and order confirmation files will have the same or a similar subject. In order to process them separately, the letter number code of each file can be matched. The first expression listed will pick up any character except a new line, followed by the constant letter code value.

The second expression will pick up any character except a new line followed by a blank space and the constant value. This need only be used if there are multiple instances of the letter code in the data file, as the blank space will distinguish it from other instances.

^Subject[:]()+Ship

If the subject line string contains 'Subject: Ship Confirmation' this expression can be used to match the input. The statement reads that the instance of Subject at the beginning of a string, followed by a colon, then a blank space and one or more instances of Ship will be matched.

.Ship()+To[:]

This statement will match 'Ship To:' in the input file. The expression will match any character except a new line that contains Ship, followed by a blank space and one or more instances of To, followed by a colon.

[0-12]\d[/]

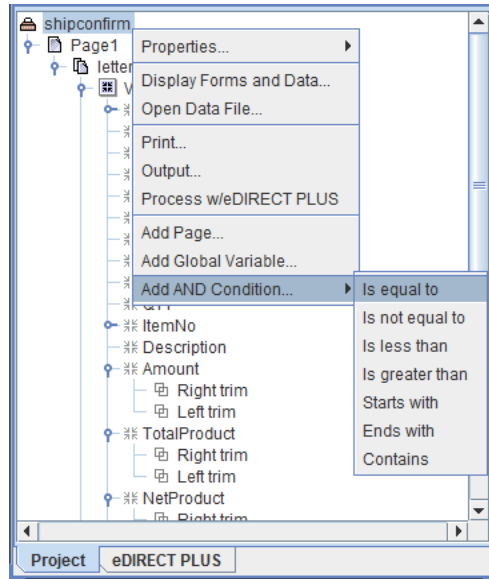
This statement will match a date in the input file with a short numerical format. An example might be 05/02/12. The expression matches any character except a new line that contains any digit from zero through 12, followed by the instance of a forward slash '/' character.

APPENDIX C: The SMTP Monitor & Processing .mbx Files

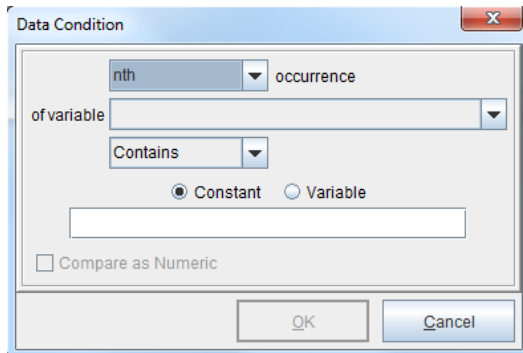
The SMTP Monitor captures outgoing email messages and generates .mbx files that can be enhanced by an eFORMz assembly engine project. With .mbx files, however, there aren't noticeable differences in naming conventions amongst various data files. In other words, .mbx shipping acknowledgements will have file names that resemble a .mbx backorder notification. For an eFORMz project to make the distinction and listen for the right file, a condition must be set within the project.

eFORMz Project Condition

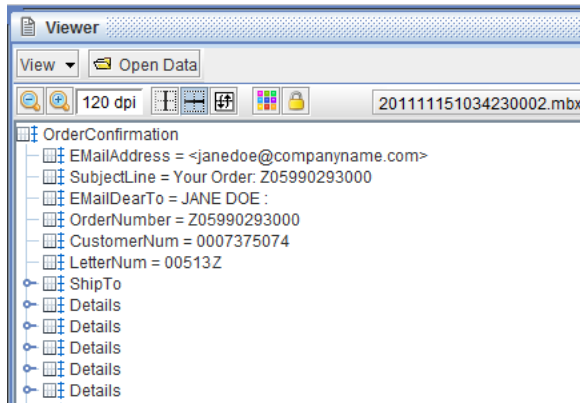
1. Beginning with a shipping confirmation, add a condition to the eFORMz project by right clicking the project name and selecting Add AND Condition > Contains.



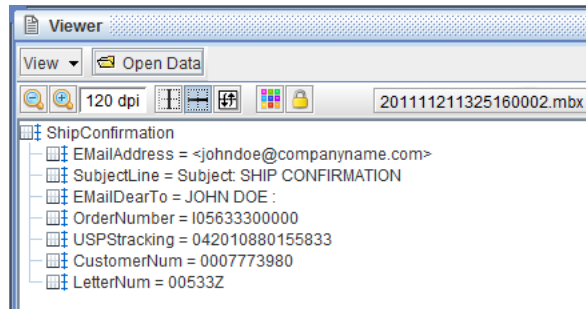
- The Data Condition dialog box will display. It is at this point a decision must be made to differentiate between .mbx data files. An element that is constant and unique to a particular file is necessary for this to occur. Often, the subject line of these files are different, and so that is commonly chosen. Letter number code is also different and unique to a given file, and so that is also a common choice. Both will be demonstrated below.



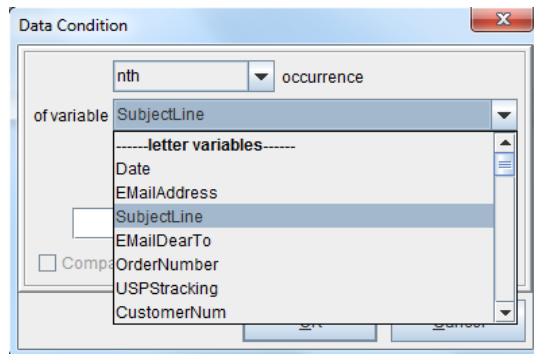
The order confirmation below has a subject line of 'Your Order: Z05990293000' and a letter number of '00513Z':



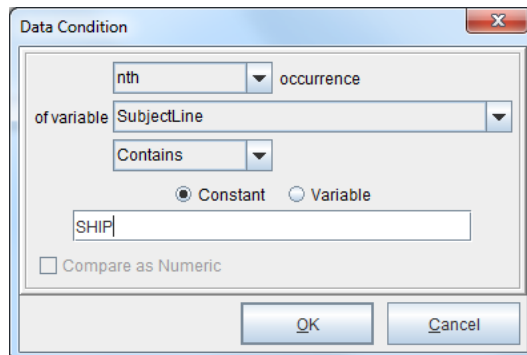
The ship confirmation below has a subject line of 'Subject: SHIP CONFIRMATION' and a letter number of '00533Z'.



3. From the drop-down menu, select the variable that picks up the subject line information.

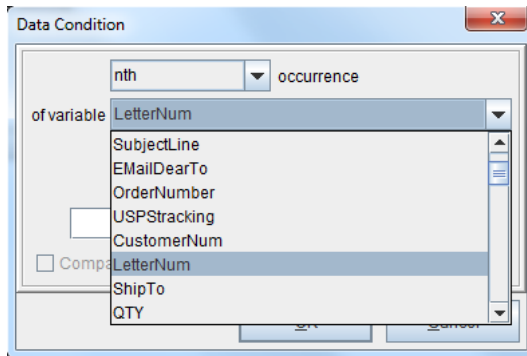


4. Select the Constant option and enter a value that matches the subject line. Entering 'SHIP' should serve the purpose, as it need only contain that word to be matched. Ordinarily, order confirmations should not have the word ship in their subject line. Click OK.

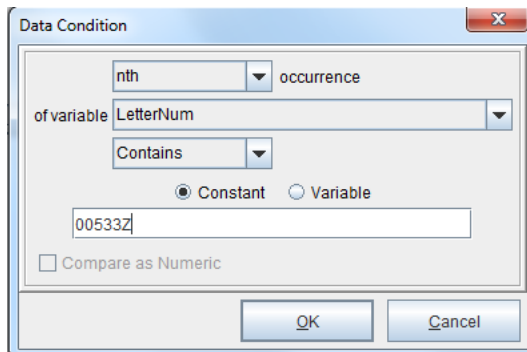


NOTE: Conditions are case-sensitive, so if the subject line contained the 'Subject: Ship Confirmation' then the constant value of the condition would have to be 'Ship' in order to generate a match.

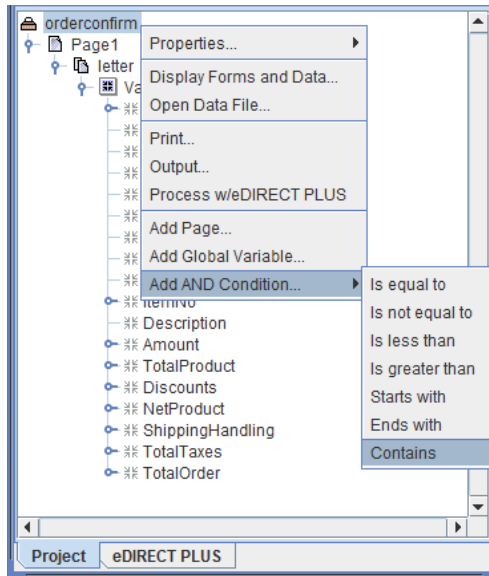
- In the event that a subject line match cannot occur, a condition can be placed on letter number code. From the Data Condition dialog box, select the variable that contains the letter number information.



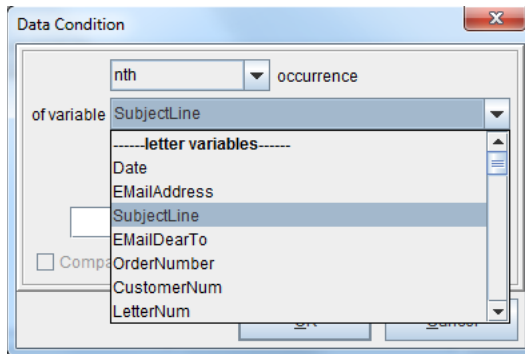
Then enter the letter number value as a constant.



- For the order confirmation project, the process is similar. Right click the project name and select Add AND Condition > Contains.



- The Data Condition dialog box will display. From the drop-down menu, select the variable that picks up the subject line information.



8. Enter a value that matches the subject line. Entering 'Order' will serve the purpose, as it need only contain that word to be matched. Ordinarily, order confirmations are the only messages that will have that word in their subject line. Recall that it is case-sensitive. Click OK.

The screenshot shows the 'Data Condition' dialog box. At the top, there is a dropdown menu set to 'nth' and a label 'occurrence'. Below this, the 'of variable' dropdown is set to 'SubjectLine'. The operator dropdown is set to 'Contains'. There are two radio buttons: 'Constant' (which is selected) and 'Variable'. Below the radio buttons is a text input field containing the word 'Order'. At the bottom left, there is a checkbox labeled 'Compare as Numeric' which is unchecked. At the bottom right, there are two buttons: 'OK' and 'Cancel'.

9. If a subject line match cannot occur, a condition can be placed on letter number code. From the Data Condition dialog box, select the variable that contains the letter number information.

The screenshot shows the 'Data Condition' dialog box. At the top, there is a dropdown menu set to 'nth' and a label 'occurrence'. Below this, the 'of variable' dropdown is open, showing a list of variables: LetterNum, SubjectLine, EMailDearTo, OrderNumber, CustomerNum, LetterNum, ShipTo, QTY, and ItemNo. The 'LetterNum' variable is selected. At the bottom left, there is a checkbox labeled 'Compare as Numeric' which is unchecked. At the bottom right, there are two buttons: 'OK' and 'Cancel'.

Then enter the letter number value as a constant.

The screenshot shows a dialog box titled "Data Condition". It contains the following elements:

- A dropdown menu with "nth" selected, followed by the text "occurrence".
- A dropdown menu with "LetterNum" selected, followed by the text "of variable".
- A dropdown menu with "Contains" selected.
- Two radio buttons: "Constant" (selected) and "Variable".
- A text input field containing "00513Z".
- A checkbox labeled "Compare as Numeric" which is unchecked.
- "OK" and "Cancel" buttons at the bottom.

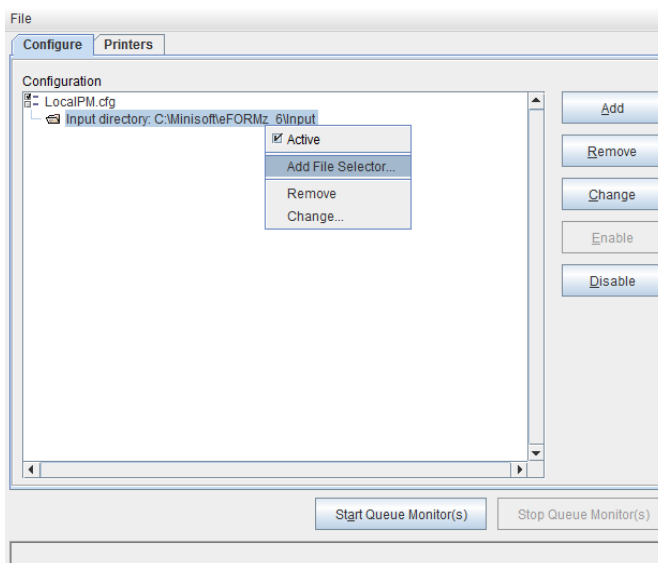
REMINDER:

Each project that is processing .mbx files must have a condition set within it. The project needs only one condition, and the most common choices are either the subject line or the letter number code.

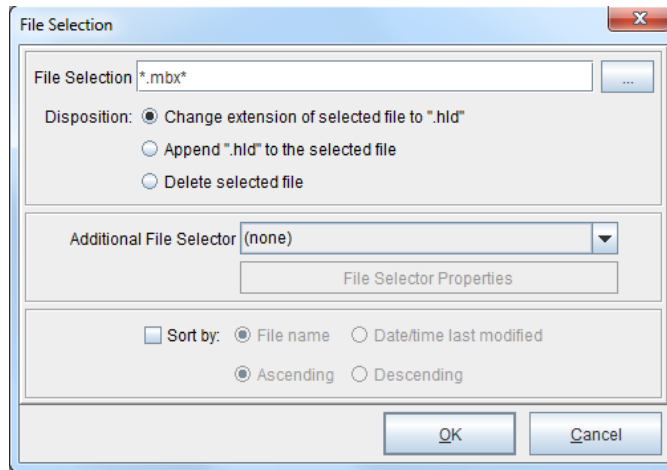
Configuring the Director Toolkit

The Director is where the eFORMz assembly engine monitors for an incoming data file. The eFORMz project identifies the data file and they are merged. eDIRECT+ is a post-process that emails this merged document. The following instructions serve as a guide for configuring the Director Toolkit to listen for .mbx files and sending emails with the eDIRECT+ Agent. For more on the Director, consult the *Director Mini-Manual*.

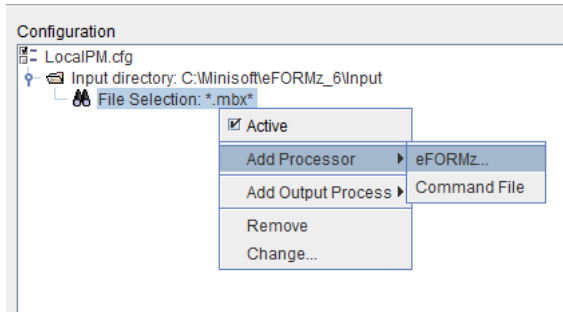
1. From the eFORMz Composer main menu select Host Tools and choose the appropriate Toolkit. The Local Toolkit applies to Windows, the AS400 Toolkit is for AS400 and iSeries users and the Unix Toolkit is for Unix and its variants.
2. The Input directory is the directory where the output file resides. Wherever eDIRECT+ Agent has been configured to output the .mbx files will be the Input directory. Right click the Input directory and select Add File Selector.



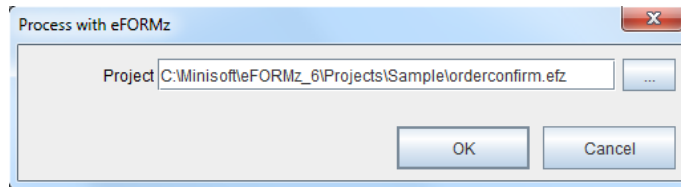
- The File Selector determines which data files are picked up. Enter *.mbx* in the File Selection field. The asterisks are wildcard characters that will pick up zero or more instances of the characters 'mbx'. In other words, all files with the .mbx extension will be picked up.



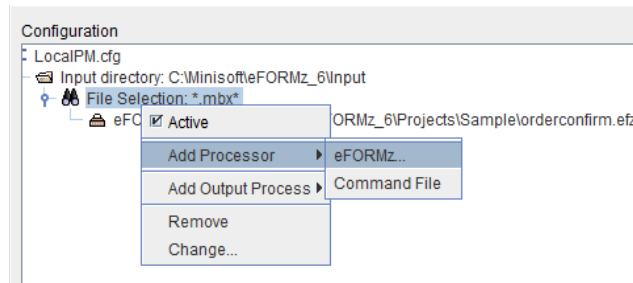
- Right click the File Selection and select Add Processor > eFORMz.



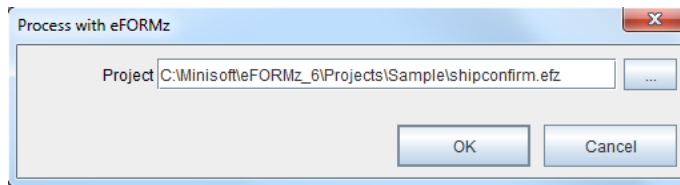
- From the browse button (...) adjacent to the Project field, locate the eFORMz project that will be merged with the .mbx files.



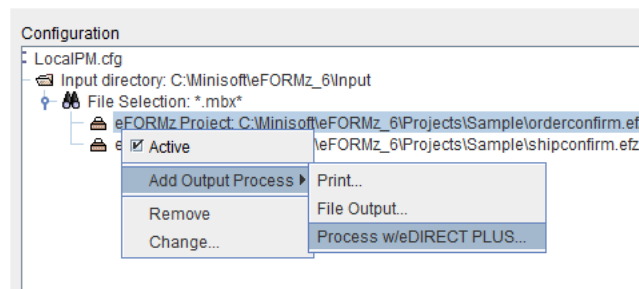
- To add another project, right click the File Selection and select Add Processor > eFORMz.



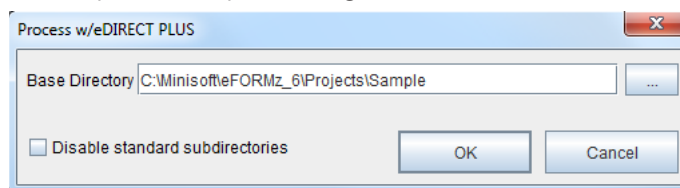
- From the browse button (...) adjacent to the Project field, locate the eFORMz project that will be merged with the .mbx files. Continue adding eFORMz projects as necessary.



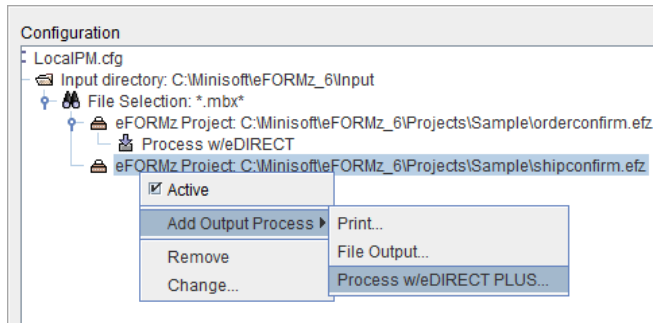
- With projects configured to listen for .mbx files and be merged appropriately, the next step is to add the eDIRECT+ post-process for emailing these documents. Right click an eFORMz Project and select Add Output Process > Process w/eDIRECT PLUS.



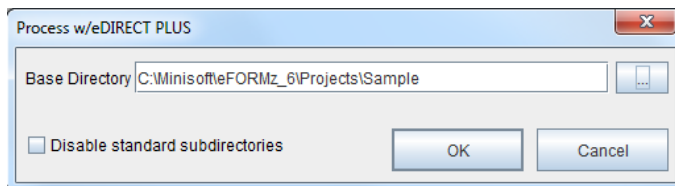
- Specify the directory where the processed output will reside by choosing a directory from the system using the browse button (...).



10. Add the eDIRECT+ output process to any other projects by right clicking the project and selecting Add Output Process > Process w/eDIRECT PLUS.



11. Specify the directory where the processed output will reside by choosing a directory from the system using the browse button (...).



12. The Director Toolkit Configuration is ready for processing.

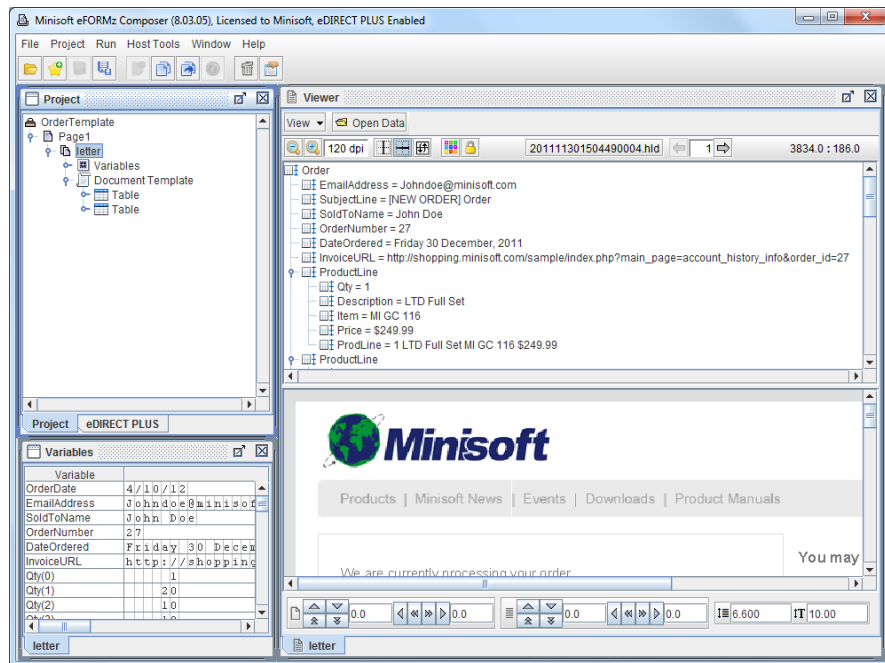
APPENDIX D: Cascading Style Sheets (CSS)

Often, transactional emails make use of Cascading Style Sheets (CSS), which define how to display HTML elements. This ensures brand consistency, as the look of any event-triggered message will reflect the company identity associated with the website. eDIRECT PLUS lets businesses create documents fully furnished with their style sheets by referencing them in the Document Template. For more on using style sheets, consult the *Cascading Style Sheets Part of the Document Template Mini-Manual*.

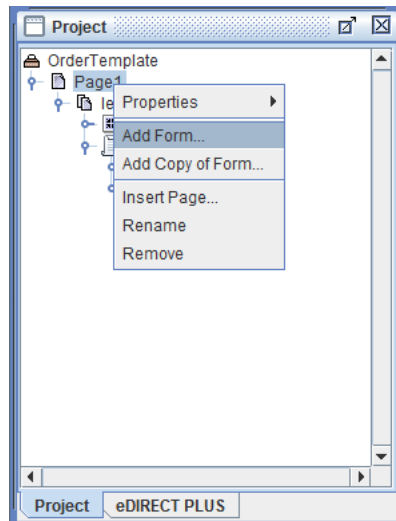
APPENDIX E: Configuring an E-Mail for Multiple Client Types

Sending messages in both HTML and text format is a sound email practice. After all, not all recipients will be able to view HTML messages properly. Plain text emails, if formatted properly, will ensure that all emails will be viewed in the appropriate format. With eDIRECT PLUS, text and HTML emails can be built and sent automatically.

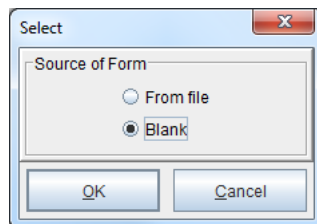
Once an HTML email has been built with eDIRECT PLUS, to send a plain text message, the user must build it accordingly. This process is similar to the design of the HTML document, as plain text emails are also built using the Document Template and processed with eDIRECT PLUS.



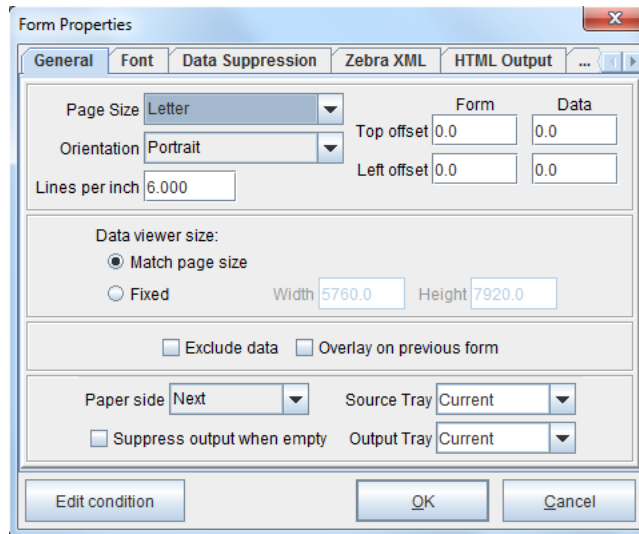
1. Crafting a plain text email, like the HTML message, requires its own form. To incorporate another form, *right click* the *Page* and select *Add Form*.



2. Choose the *Blank* option from the *Source of Form* field.



3. The Form Properties dialog box will display. Click OK to proceed.

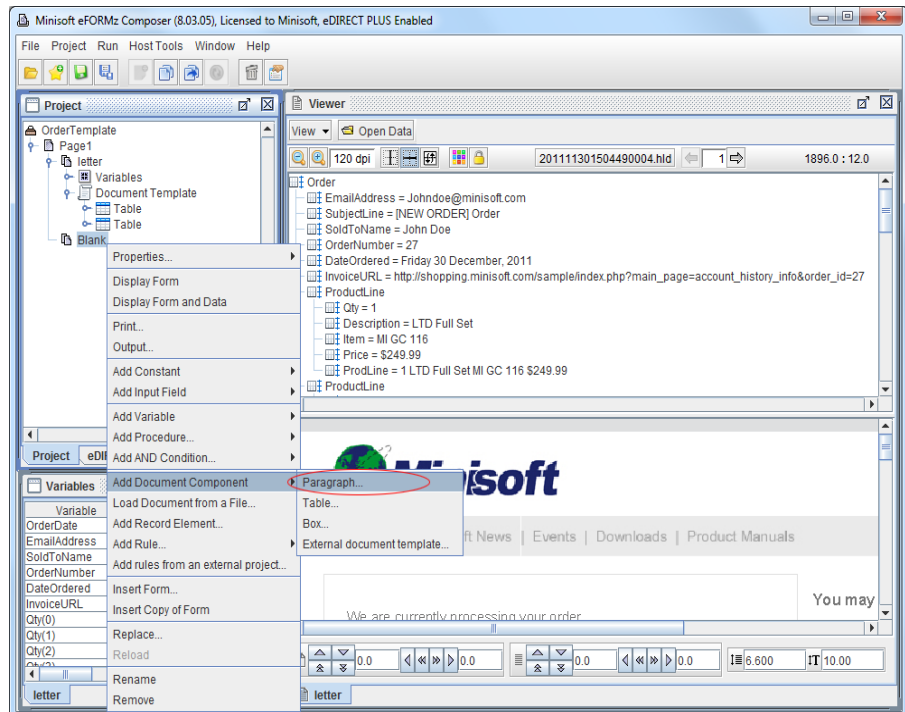


The Form Properties dialog box is shown with the following settings:

- Page Size: Letter
- Orientation: Portrait
- Lines per inch: 6.000
- Form Top offset: 0.0, Left offset: 0.0
- Data Top offset: 0.0, Left offset: 0.0
- Data viewer size: Match page size (selected), Fixed (5760.0 Width, 7920.0 Height)
- Exclude data: Overlay on previous form:
- Paper side: Next
- Source Tray: Current
- Suppress output when empty: Output Tray: Current

Buttons: Edit condition, OK, Cancel

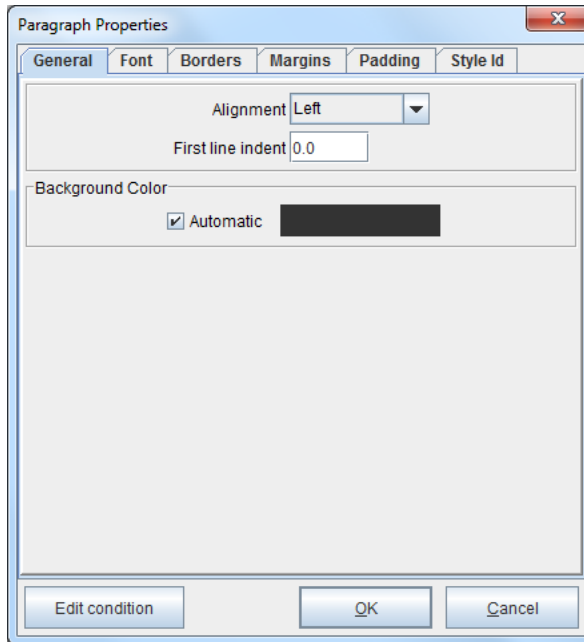
4. Right click the Blank form and select Add Document Component > Paragraph.



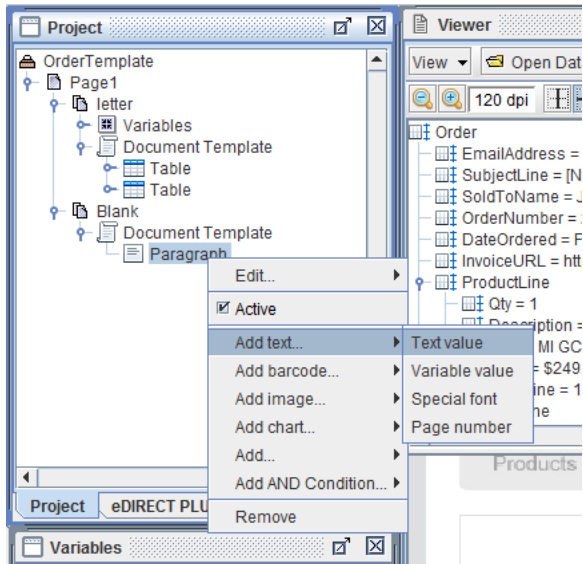
The Minisoft eFORMz Composer interface is shown with the following details:

- Project: OrderTemplate
- Page: Page1
- Form: Blank
- Viewer: Order details (EmailAddress, SubjectLine, SoldToName, OrderNumber, DateOrdered, InvoiceURL, ProductLine, Qty, Description, Item, Price, ProdLine)
- Context menu: Add Document Component > Paragraph (highlighted)
- Variables list: OrderDate, EmailAddress, SoldToName, OrderNumber, DateOrdered, InvoiceURL, City(0), City(1), City(2)

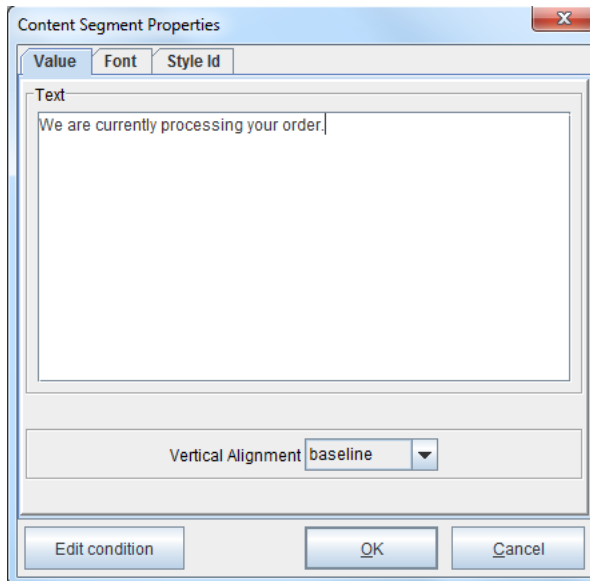
- The *Paragraph Properties* dialog box will display. Adjust the *Alignment* and other fields as necessary.



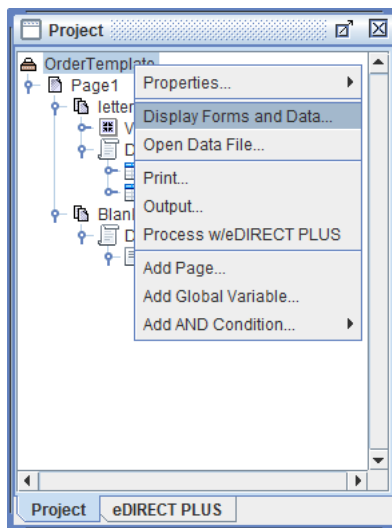
- Right click the *Paragraph* and select *Add text > Text value*.



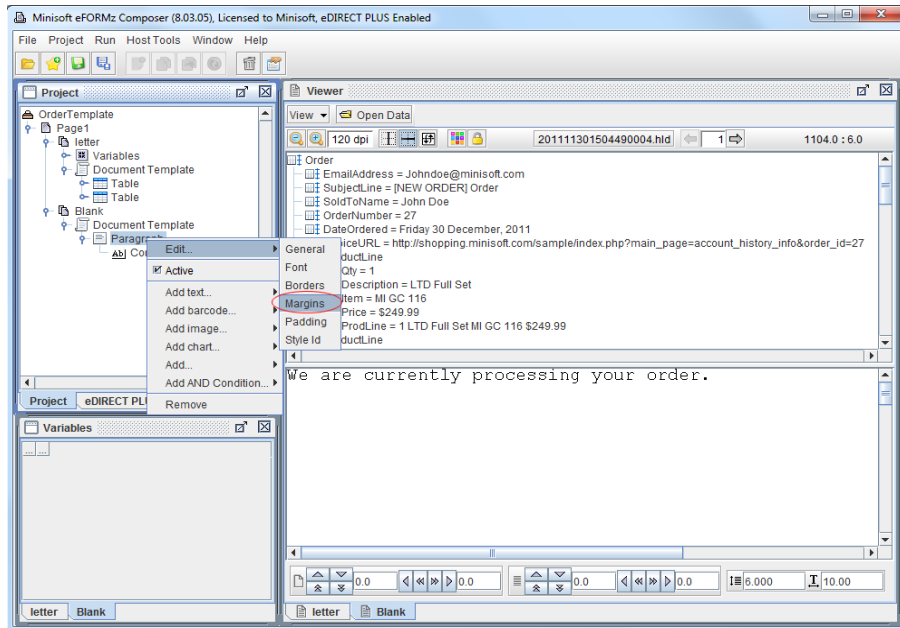
7. Enter a value in *Text* field and click OK to continue.



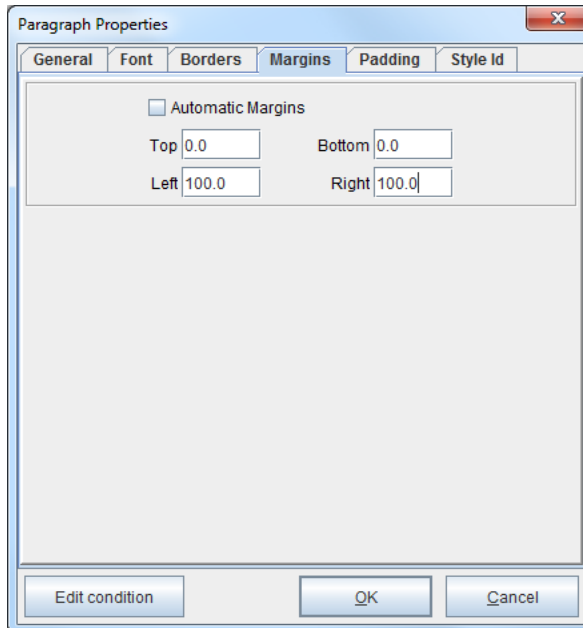
8. To see all of the plain text document, right click the Project and select *Display Forms and Data*.



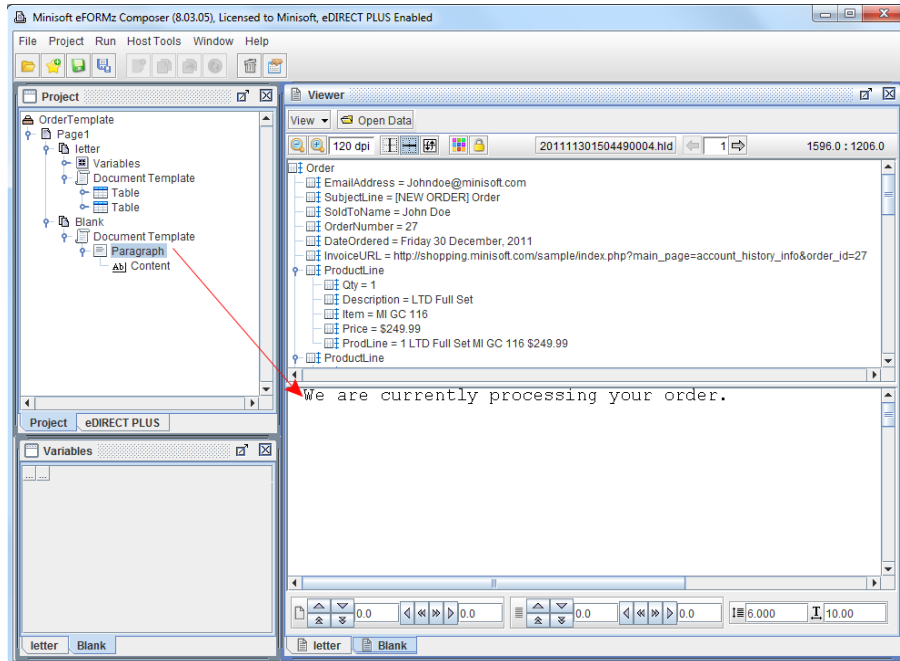
- To edit the element, *Right click* it, highlight *Edit* and pick the appropriate option. For example, to change the margins, select *Edit > Margins*.



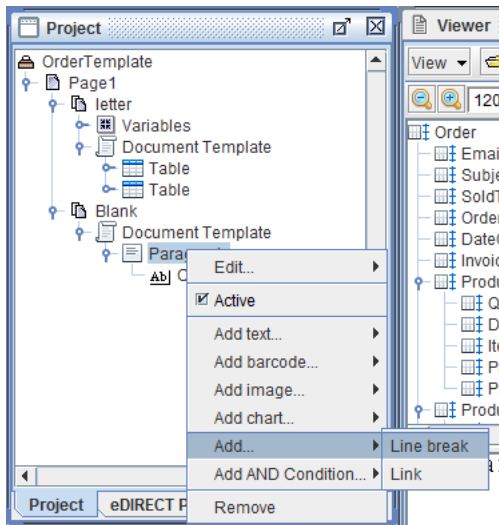
- To edit the element, *Right click* it, highlight *Edit* and pick the appropriate option. For example, to change the margins, select *Edit > Margins*.



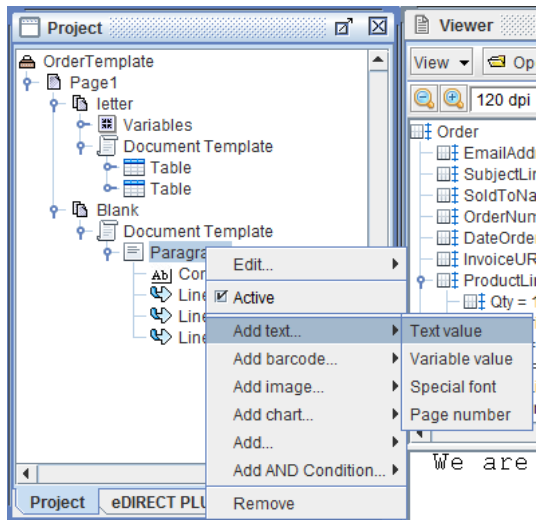
- The element will be successfully updated.



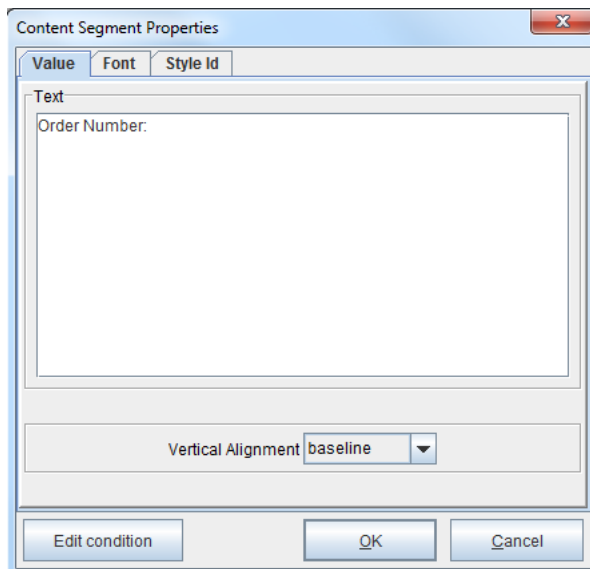
- To add spaces, right click the Paragraph and select Add > Line Break.



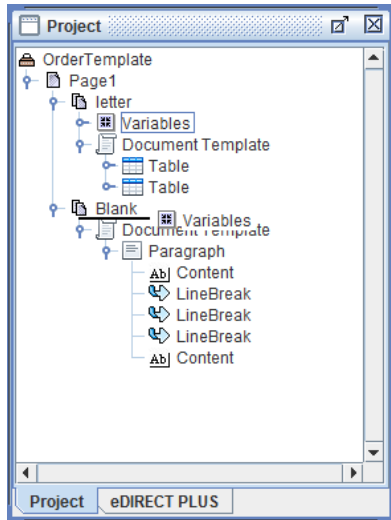
13. Right click the *Paragraph*, highlight *Add text* and pick the *Text value* option.



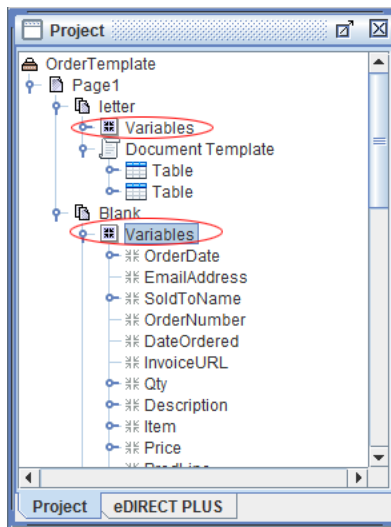
14. Enter a value in the *Text* field.



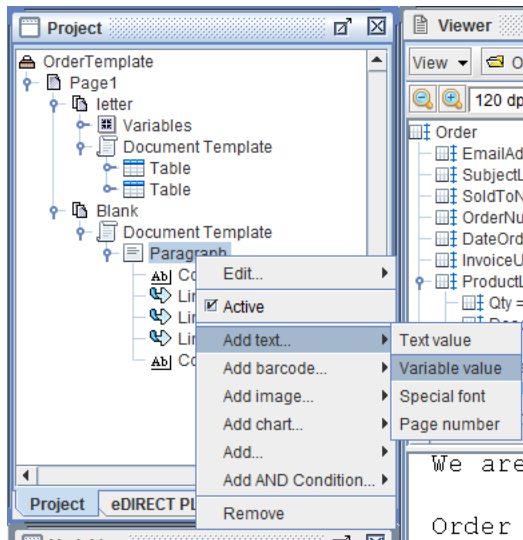
15. To add variable values to the plain text email, the user need only copy the variables created for the HTML message. Left click the *Variables* and hold the Ctrl key. Then drag the *Variables* to the plain text document.



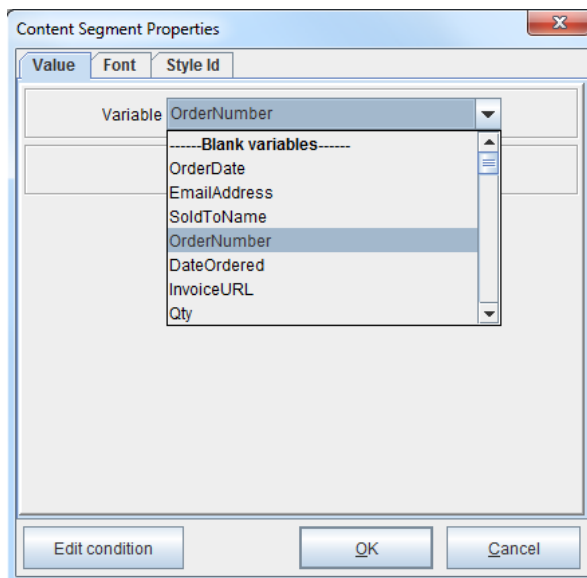
16. The variables will be available for placement in both the HTML and plain text messages.



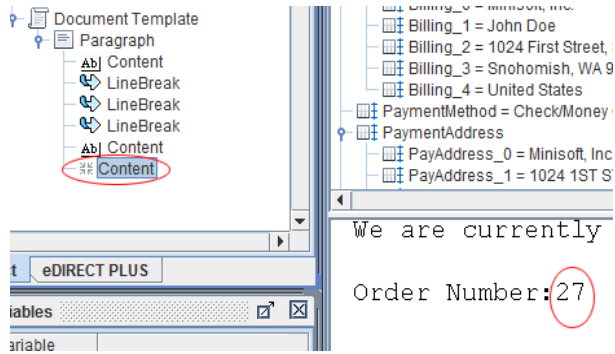
17. To add one of these variables, *right click* the *Paragraph* and select *Add text > Variable value*.



18. Choose the desired variable from the *Variable* drop down menu.



19. The variable will be placed. Continue adding document components until the email is deemed ready.



APPENDIX F: Cross-Selling and Upselling

Cross-selling and upselling are suggestive techniques designed to boost sales. Both methods match customers with additional products or services that might fit their needs, at the moment of a given purchase. Upselling is the practice of encouraging a client to buy an enhanced version of the product, or a related item that is more expensive. Cross-selling refers to the process of selling a complementary product or service. While effective at increasing revenue, cross-selling and upselling also strengthen existing customer relationships and contribute to their overall satisfaction. Minisoft's eDIRECT PLUS can incorporate relevant upsell and cross-sell offers.

You may also like



[2 3/4" Wood Tees 100
Count \\$6.99](#)



[5000 Full Set \\$399.99](#)



[Men's Cardiff Golf Shoes
- Black \\$109.99](#)

Dynamic

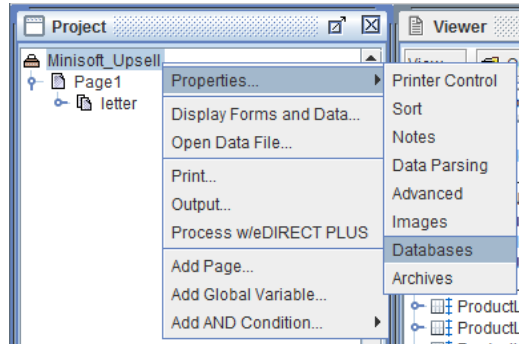
Configuring the Database

As numerous items could be shown for a particular product purchased, a database must be configured so that the dynamic information can be called with eDIRECT PLUS. While this information may be considered static, changing only periodically, the information referenced from the database will be plugged into Variables. This ensures that the latest updates from the database are automatically called.

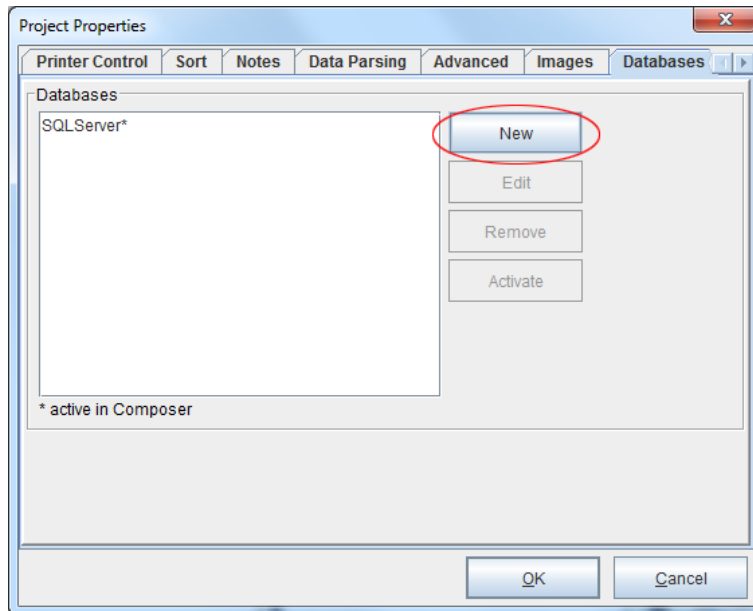
Create a database with the necessary information. This may include the URL for an image, heading information and a link to the product's page on the website:

IP_1	Heading_1	URL_1	IP_2	Heading_2	URL_2	IP_3	Heading_3	URL_3	
http://shopping.min 2 3/4"	Wood Tee:	http://shoppin	http://shopping.m	5000 Full Set	\$399.9	http://shoppin	http://shopping.m	Men's Cardiff Go	http://shoppin
*									

1. Right click the Project and select Properties > Databases.



2. To add a new configuration, select the New option.



NOTE: eDIRECT PLUS supports many databases. Some of these include SQL Server, My SQL, Access, Oracle, Image, Eloquence, Progress, Sybase, DB2 (iSeries) and Informix.

3. To edit the existing SQL Server database configuration, highlight it and select Edit.

Configure database connection

Database connection name: SQLServer

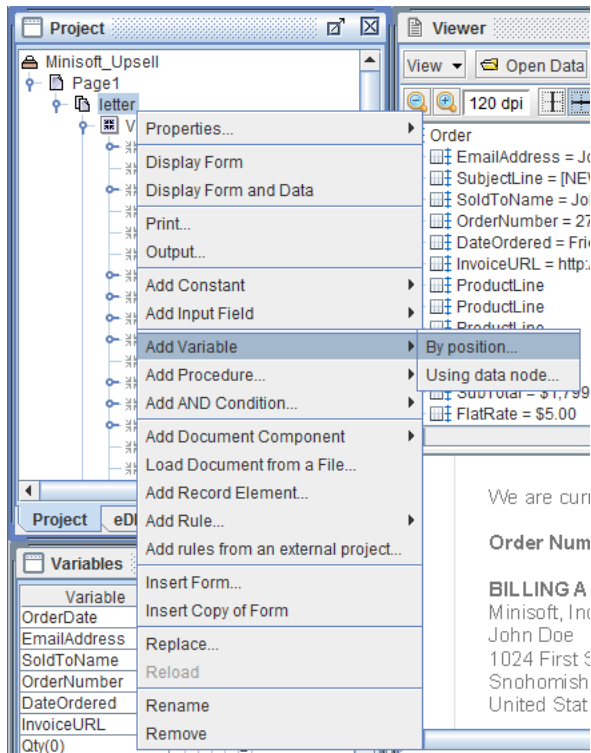
Driver class: com.microsoft.sqlserver.jdbc.SQLServerDriver

URL: jdbc:sqlserver://sturgeon1sturgeon_sql:1433;database=

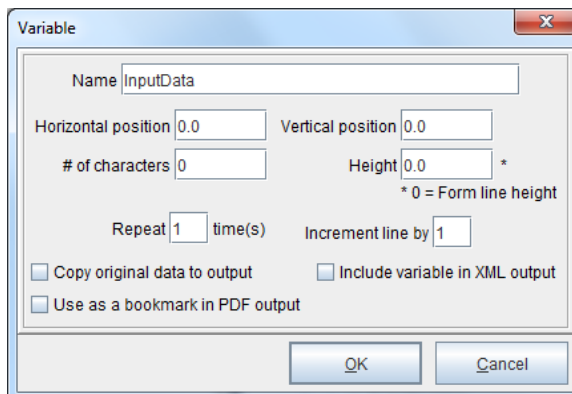
Properties:

Property	Value
applicationName	
databaseName	
enableStatementPooling	true
encrypt	true
failoverPartner	
hostNameInCertificate	
instanceName	

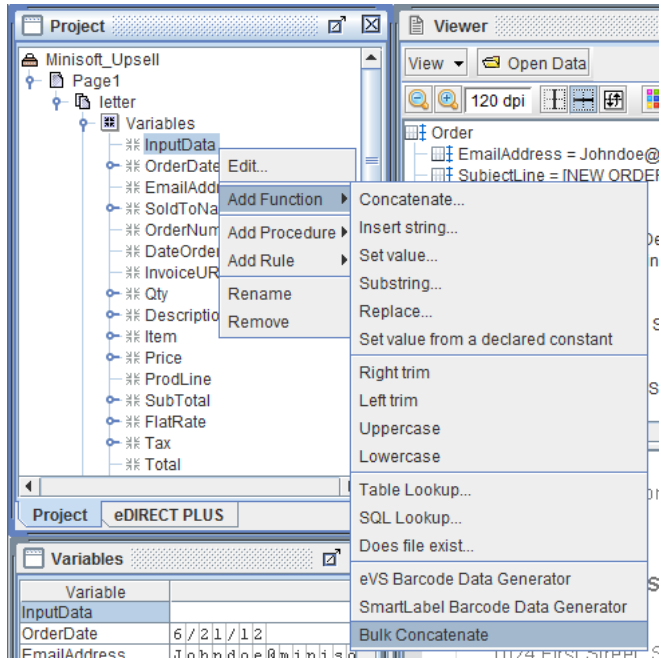
4. Right click the Form and select Add Variable > By position.



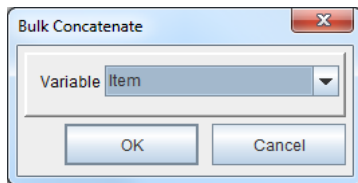
5. Name the Variable. This "InputData" Variable will act as the parameter for the SQL or Table Lookup.



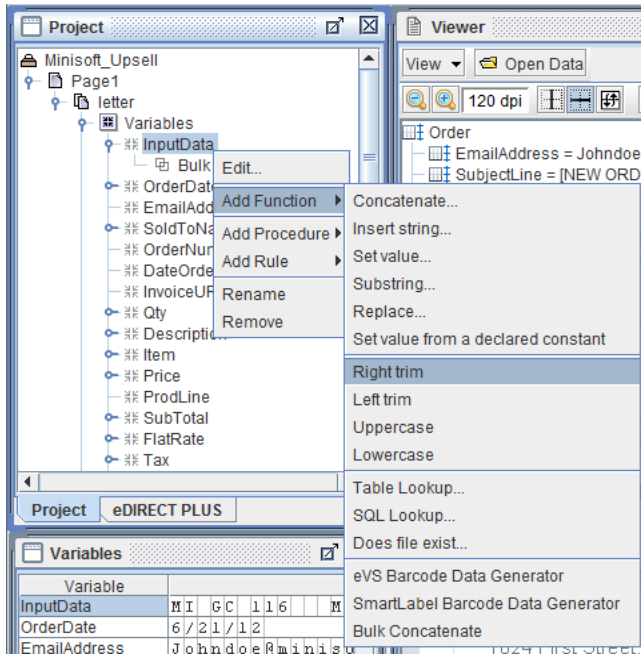
- Right click the Variable and select Add Function > Bulk Concatenate.



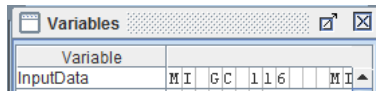
- Select a Variable from the drop-down menu that contains Item Number information.



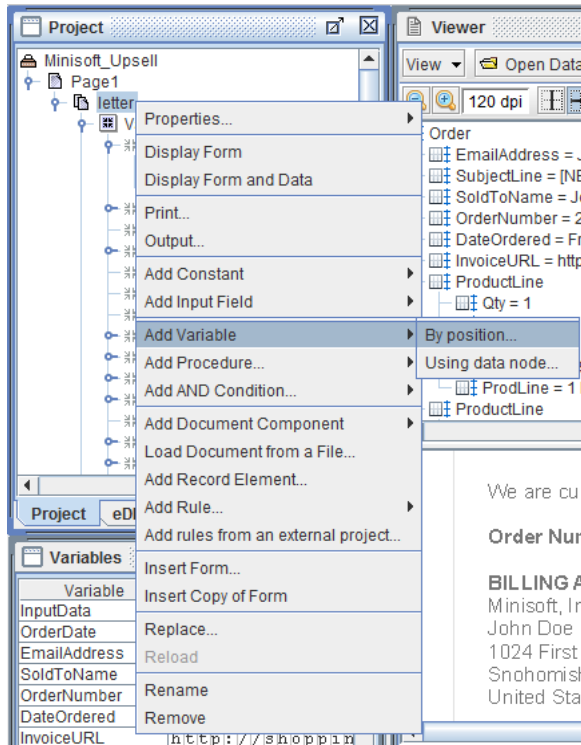
- Right click the InputData Variable and select Add Function > Right trim.



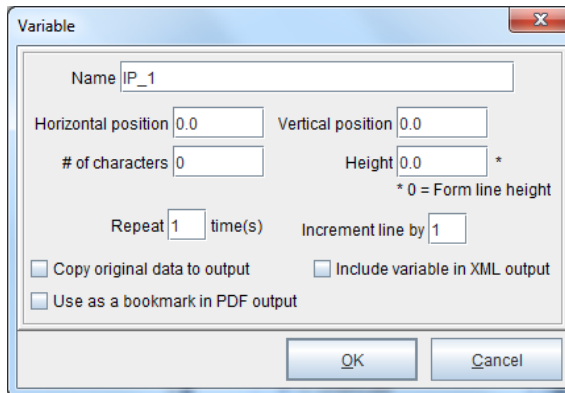
- The InputData Variable will now contain each instance of an Item Number from a given order.



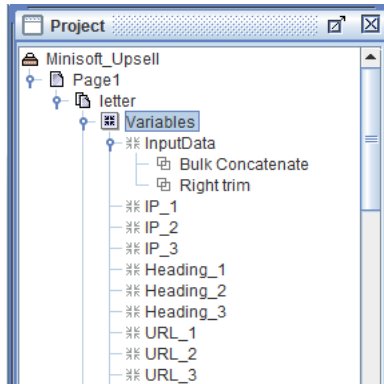
- Right click the Form and select Add Variable > By position.



- Name the Variable so that it represents the Image (IP_1 in this example) column from the database.



- Continue adding Variables By position to represent each of the columns from the database. Right click one of these Variables (such as IP_1) and select Add Function > SQL Lookup.

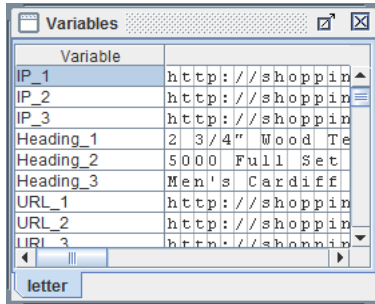


- In the SQL Statement field, enter the statement as a Constant value or select a Variable which contains the statement. In the Parameters field, select the Add button and pick the InputData Variable created earlier. In the Additional columns assigned to field, select the Add button and choose all of the Variables that represent columns in the table that is being referenced in the SQL statement.

The screenshot shows the 'SQL Lookup' dialog box. At the top, the 'Database' dropdown is set to 'SQLServer*'. Below it, the 'SQL Statement' section has two radio buttons: 'Constant' (selected) and 'Variable'. The 'Constant' option has a text box containing 'SELECT * FROM table_name'. The 'Variable' option has a dropdown menu showing 'letter variables'. The 'Parameters' section has a list box containing 'InputData' and four buttons: 'Add', 'Remove', 'Move up', and 'Move down'. The 'Additional columns assigned to:' section has a list box containing 'IP_1', 'IP_2', 'IP_3', 'Heading_1', 'Heading_2', 'Heading_3', and 'LUP_1' and four buttons: 'Add', 'Remove', 'Move up', and 'Move down'. At the bottom are 'OK' and 'Cancel' buttons.

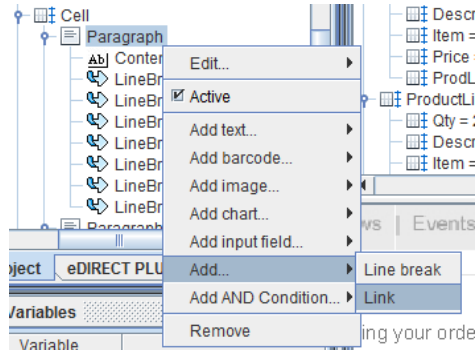
NOTE: A typical SELECT statement to return a column from a table is as follows: SELECT column_name(s) FROM table_name. Selecting all columns will require the SELECT * FROM table_name format. A stored procedure may also be referenced using an EXECUTE (EXEC) statement.

14. In the Variables Window in the bottom left of the Composer, all of the column Variables will be picking up the information from the database.

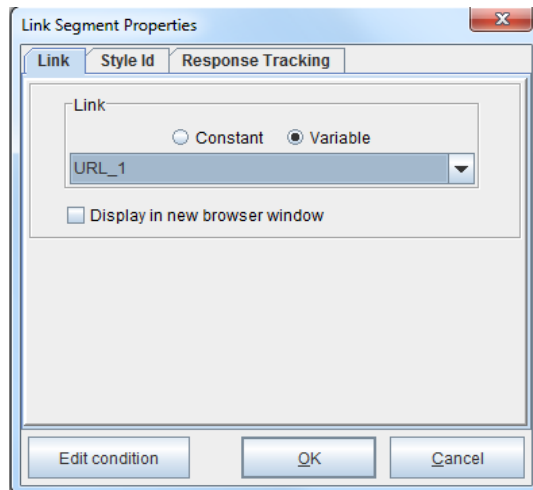


Links

1. To incorporate the product Link from the database, right click the Paragraph component and select Add > Link.

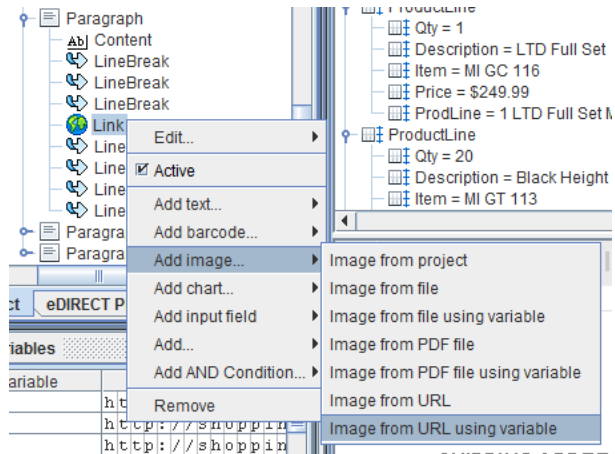


2. Select the Variable that references the column containing links to product pages (URL_1 in this example). Click OK and repeat the process for additional URL column references.

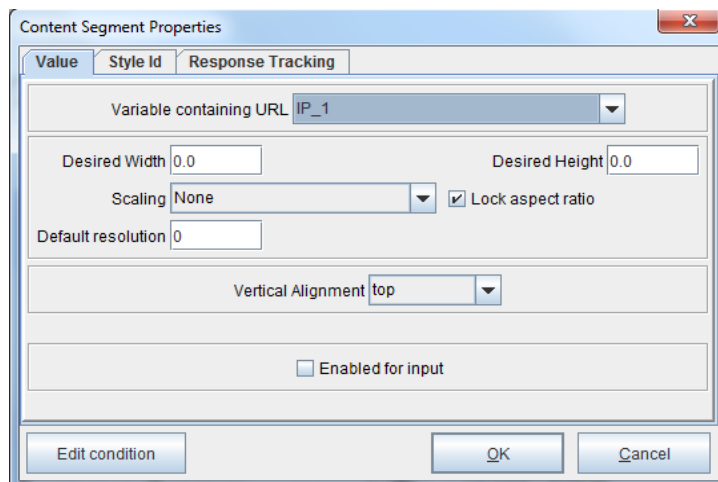


Images

1. To incorporate the Image from the database, right click the Link and select Add image > Image from URL using variable.

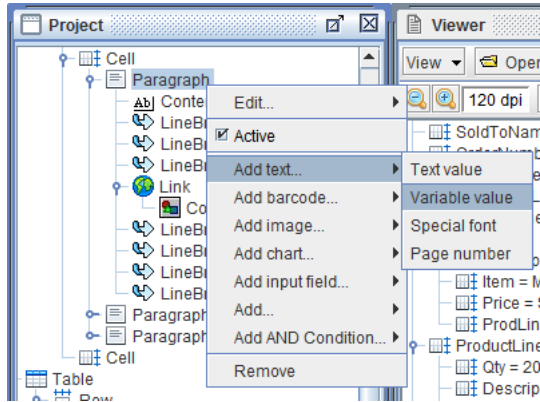


2. Select the Variable that contains the Image URL. Click OK and repeat the process for adding other Image columns.

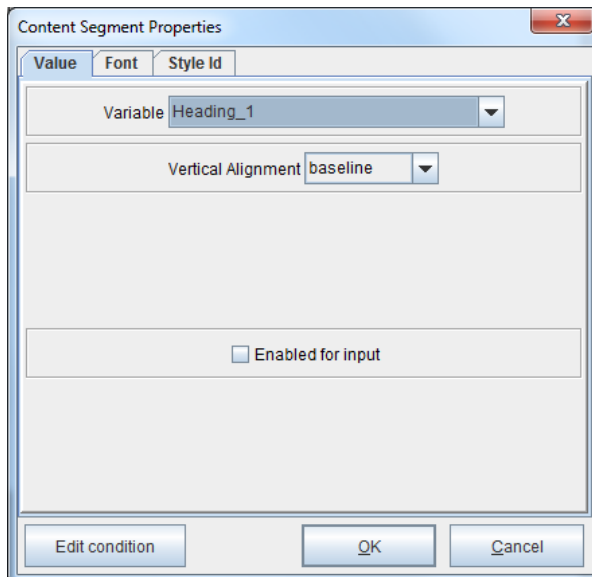


Headings

1. To incorporate the Heading information from the database, right click the Paragraph Component and select Add text > Variable value.



2. Select the Variable that contains the Heading value. Click OK and repeat the process for adding other Heading columns.

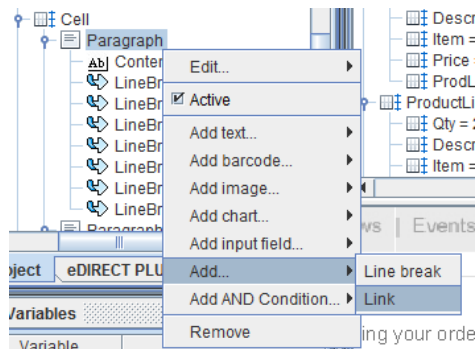


Static

Link

Static offers, which refer to proposals which do not make calls to a database, utilize linked information or constant values. Often, this information is displayed conditionally.

1. To add a Link to a particular product, right click the Paragraph component and select Add > Link.



2. Enter the URL for the product's page in the Link field.

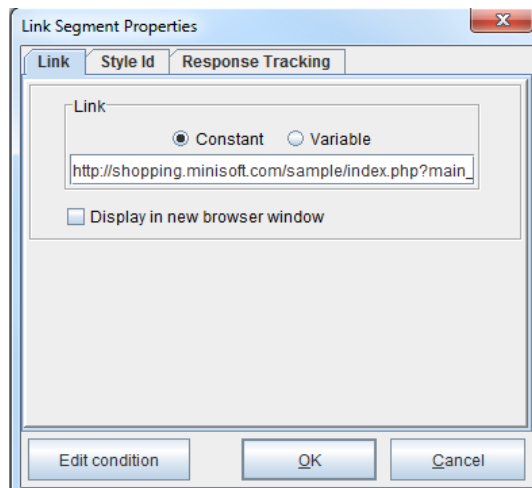
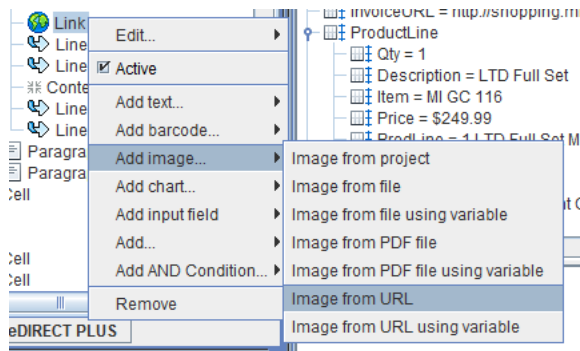
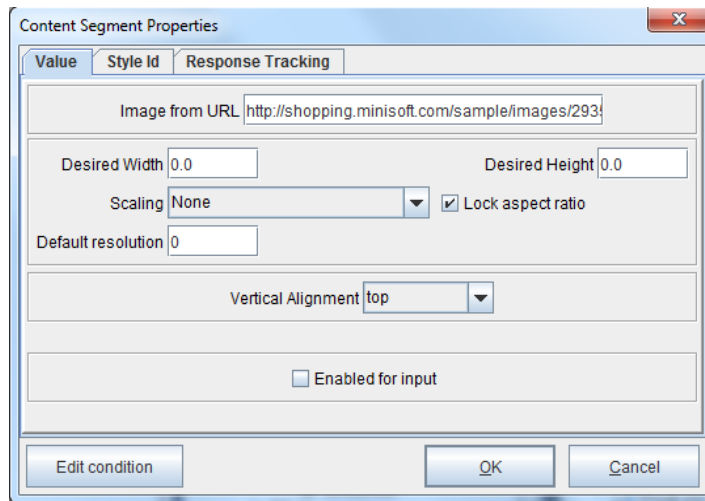


Image from URL

1. To add an Image of a particular product to the Link, right click the Link and select Add image > Image from URL.

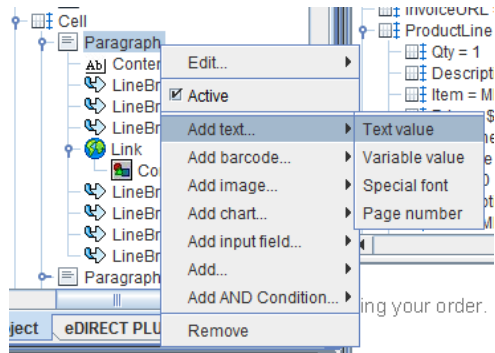


2. Enter the URL for the Image in the Image from URL field.

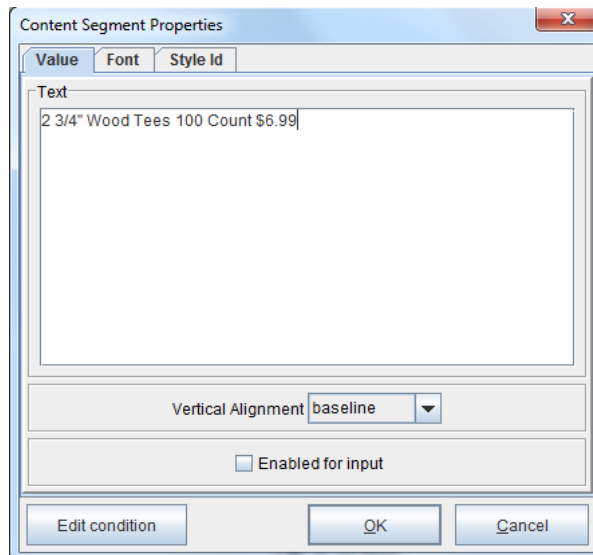


Text Value

1. To add descriptions of a particular product, right click the Paragraph component and select Add text > Text value.



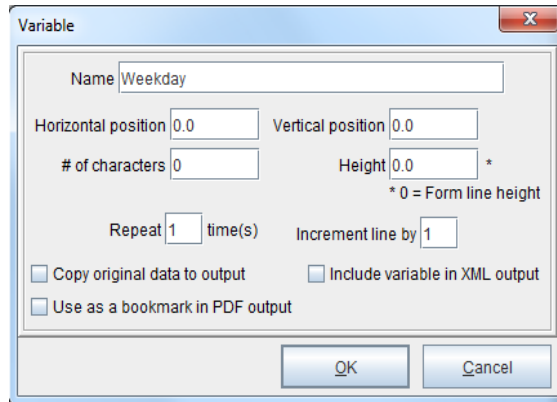
2. Enter a value for the Text field that describes the product. Click OK to complete.



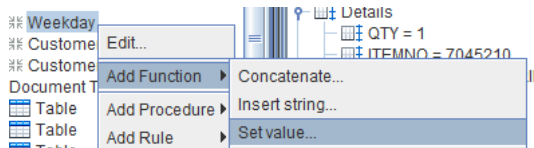
Conditional Logic Language

To display certain products conditionally, by day of the week for example, Conditional Logic Language is employed.

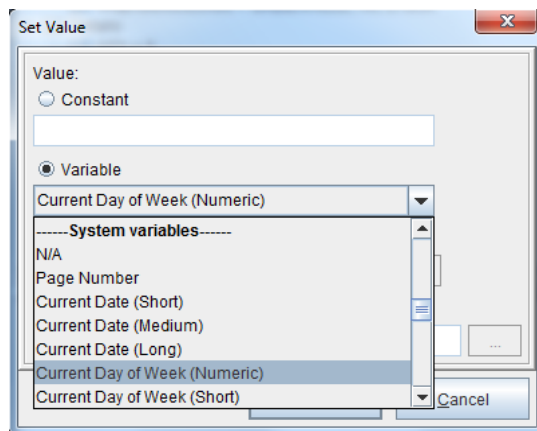
1. To conditionally place a product based upon the day of the week, create a Variable By position that will act as the weekday reference.



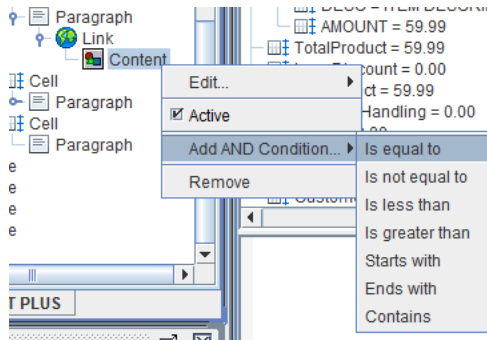
2. Right click the Variable and select Add Function > Set value.



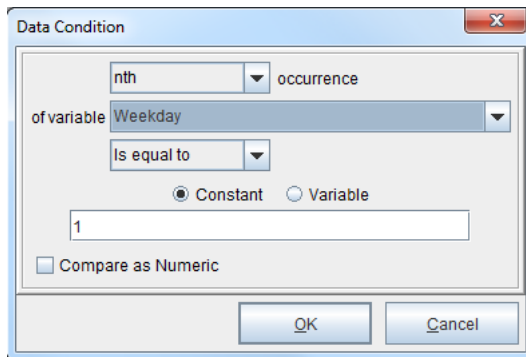
3. Select the Current Day of Week (Numeric) System variable from the Variable drop-down menu.



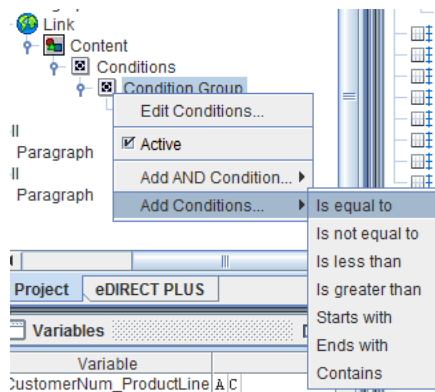
- Right click the Image and select Add AND Condition > Is equal to.



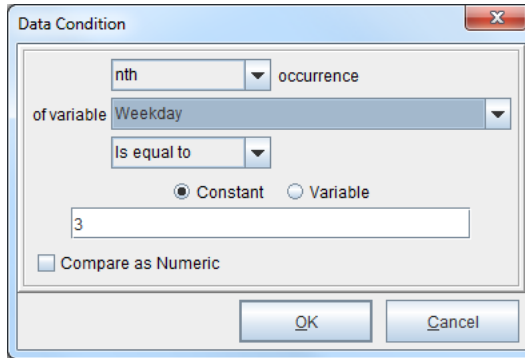
- Select the Weekday Variable and enter a Constant value of 1. This will ensure that the Image will display if nth instance of the Weekday Variable is equal to the first day of the week.



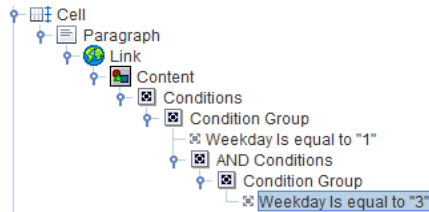
- To add another Condition, right click the Condition Group and select Add Conditions > Is equal to.



7. Select the Weekday Variable from the drop-down menu and then enter 3 as the Constant value. If nth instance of the Weekday Variable is equal to the third day of the week, then the Image will also display.



8. If it is the first or third day of the week, then this particular image will display. It will not display on other days of the week.



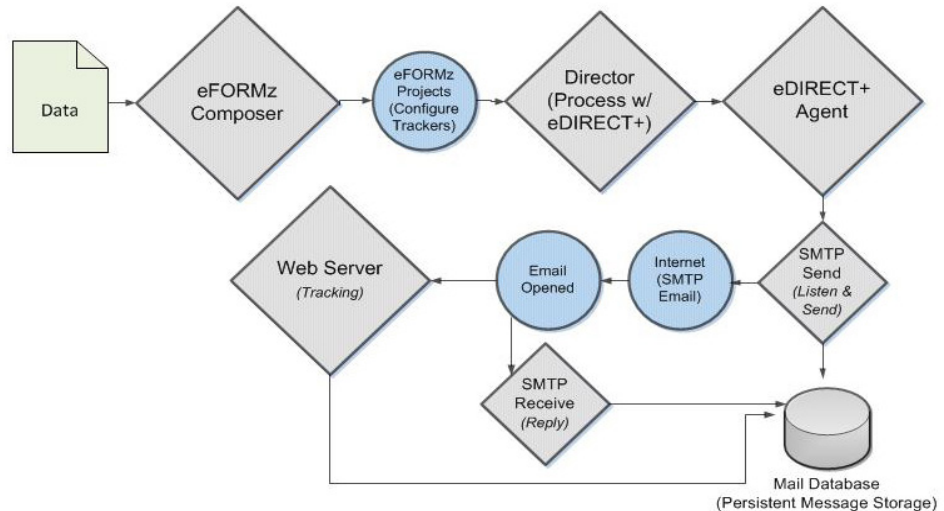
APPENDIX G: Response Tracking

Response measurement is a way to analyze marketing performance in order to make more informed business decisions. When sending an email with eDIRECT+, add a response tracker to a link or image to verify how much traffic it generated.

Response tracking of emails requires four components:

- The eDIRECT+ Agent
- The Web Server
- The Mail Database
- An email containing the tracking information

The SMTP Receive service (Inbound Mail Transfer Agent), which primarily listens for incoming messages such as Delivery Status Notifications, also supports the Response Tracking module inside eDIRECT+ in the event of a reply to an email or a returned Delivery Status Notification such as a read receipt.



To enable response tracking, eFORMz monitors a directory where specified output resides, and then picks up the data and merges it with an HTML document designed with the eFORMz Composer. Within the eFORMz Composer, there are two standard trackers that can then be configured: *eDIRECT PLUS Agent - ReadTracking* and *eDIRECT PLUS Agent - ClickTracking*. Read tracking determines if the email was read and counts opens. For example, an image on an email could have read tracking configured for it to count how many times that email was read. Click tracking counts the number of clicks for a link. For example, a link on a transactional email could have response tracking configured to determine if the recipient clicked on that link. Once trackers are configured, the email can be sent. The eDIRECT+ Agent sends an SMTP email to the recipient, which is then opened. Once opened, responses are sent to the Web Server, which counts responses. There are two kinds of responses. One is a request for an image and the other is a request to go to a link. When the Web Server receives a request for an image, it counts the event and then responds with the requested image. When it receives a request to go to a link it counts the event and responds by redirecting to the link.

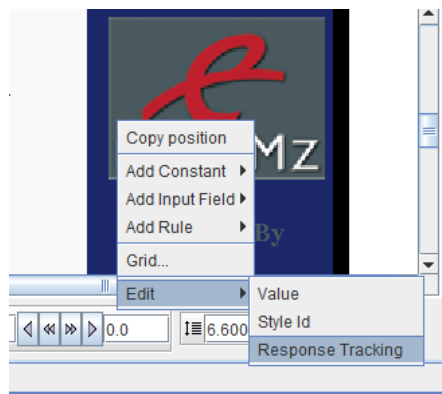
The Web Server's default context (the part after the address and port in the url) is "tracking". It takes 2 parameters which are "ContentId" and "CounterId". ContentId is generated when the email is originally sent. CounterId is user-defined. The context is used to create a table in the Mail Database that keeps the counts. One table is built for each tracking context to count responses. The table, 'TrackingContexts' contains the ContentId of the email, the CounterId, the date/time of first response, the date/time of last response, and the response count. The columns are as follows: ContentId, CounterId, first_count, last_update and counter. Analysis of response tracking data is done by querying this table with a third party reporting tool, such as SQL Server Reporting Services.

NOTE: Other configurations can be used to support third party response tracking servers. Contact Minisoft support for more information at support@minisoft.com or (800)682-0200.

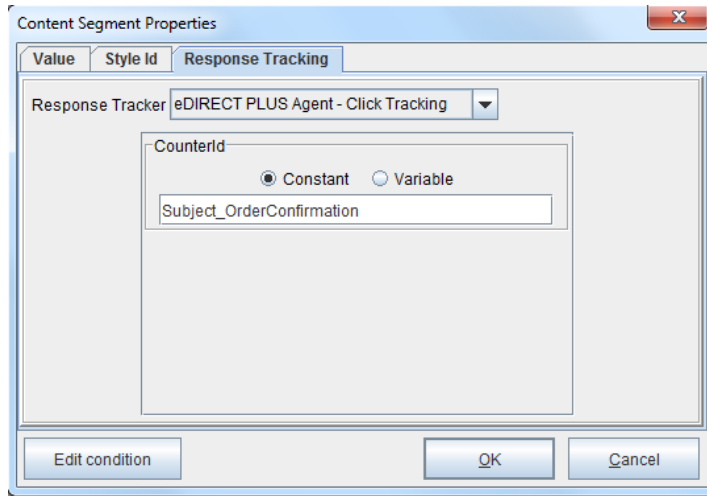
Configuring an Email for Response Tracking

For configuring an email for response tracking, a tracker can be put on either image content or links inside of a Document Template. Response tracking configured for an image will cause a request to the server every time that image is displayed. This can be used to count when and how many times an email is read. *eDIRECT PLUS Agent - Read Tracking* would be used in this situation. Response tracking configured for a link will cause a request to the server every time that link is clicked, counting the number of clicks the link receives. *eDIRECT PLUS Agent - Click Tracking* would be used in this situation. Typically, each image and/or link that has response tracking configured will use a different "CounterId" so the specific event can be counted.

To configure an image on a transactional email for *eDIRECT PLUS Agent - Read Tracking*, right click the image and select *Edit > Response Tracking*.

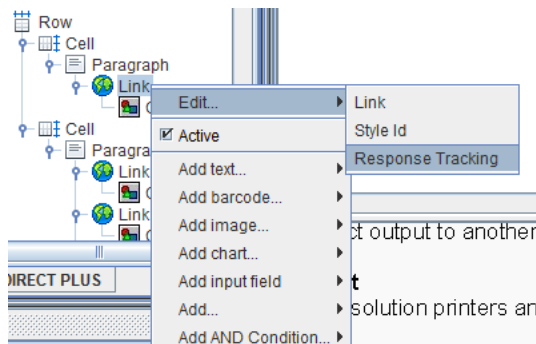


The Content Segment Properties dialog box will display. Select *eDIRECT PLUS Agent - ReadTracking* from the drop-down menu. Next, enter a constant value for the ContentId parameter, or select a variable value from the drop-down menu.

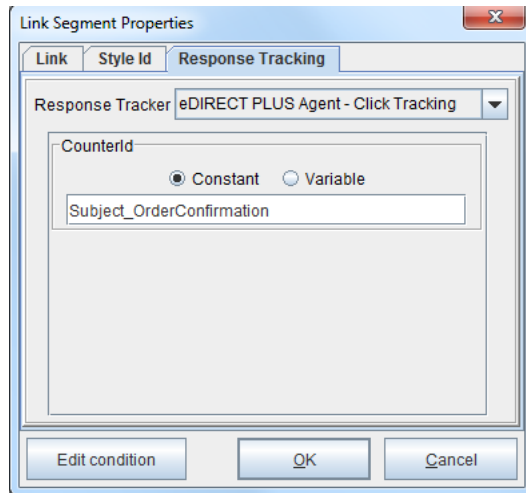


TIP: In addition to the image and the email, the CounterId can identify the recipient. To do this, the CounterId would have to contain information on the customer and/or the product. Using a variable value that has the subject line, the order confirmation number or the product item number data could fulfill this requirement.

A link on a transactional email could have response tracking configured to determine if the recipient clicked on a link. To configure an image on a transactional email for *eDIRECT PLUS Agent - ClickTracking*, right click the image and select *Edit > Response Tracking*.



The Content Segment Properties dialog box will display. Select *eDIRECT PLUS Agent - Click Tracking* from the drop-down menu. Next, enter a constant value for the CounterId parameter, or select a variable value from the drop-down menu.



TIP: In addition to the link and the email, the CounterId can identify the recipient. To do this, the CounterId would have to contain information on the customer and/or the product. Using a variable value that has the subject line, the order confirmation number or the product item number data could fulfill this requirement. For example, if the link in the email was to a web page for a specific product, the proper naming of the CounterId could show if the email prompted anyone to look at the product and also if the product was ordered by anyone reading the email. The data analysis would consist of comparing the responses for the link to the orders for the product.

Querying Results

To retrieve the counter information, the 'TrackingContexts' table must be queried. For example, as shown above, 'Subject_OrderConfirmation' was the value for ContentId. So, using a `SELECT * FROM TrackingContexts WHERE CounterId = 'Subject_OrderConfirmation'` will show all of the counting results.

These are the tables created and used by the eDIRECT PLUS Agent for response tracking:

TrackingContexts

Contains a row for each tracking context, which contains the context name and a count of the number of emails sent that use that tracking context.

RT_<tracking context name>

One table is built for each tracking context to count responses. The table contains the contentID of the email, the counterID, date/time of first response, data/time of last response, and the response count.

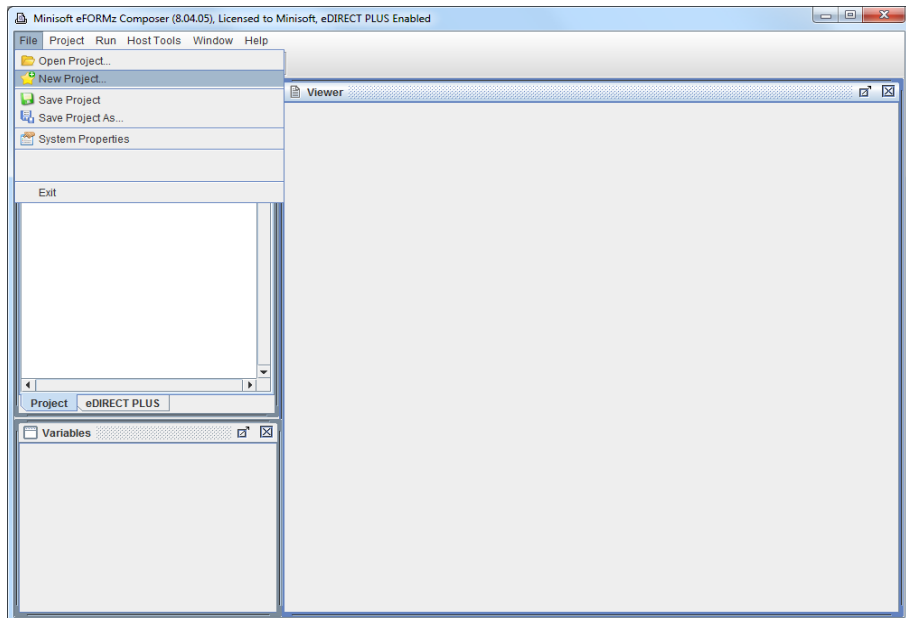
APPENDIX H: SMS Gateway Configuration

Short Message Service (SMS) is a text messaging service that enables the sending and receiving of messages between mobile phones. A text message can include 160 characters if 7-bit character encoding (Latin characters) is used or 70 characters if 16-bit Unicode UCS2 character encoding is used (non-Latin characters such as Chinese). Sending SMS text messages requires the eFORMz Assembly Engine, the eDIRECT+ SMS Gateway and an SMS Provider.

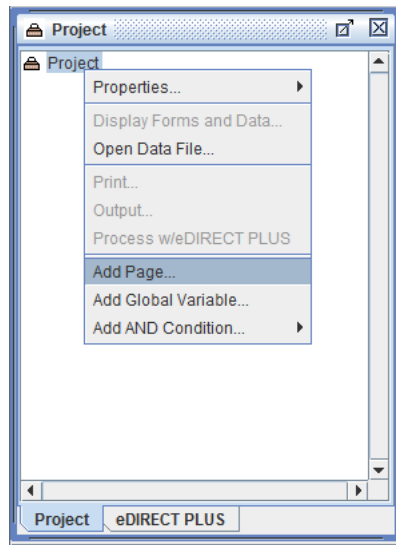
Configuring the eFORMz Project

The eFORMz Assembly Engine monitors a directory for incoming data generated by a software application and then merges that data with a form or document to be printed, faxed, emailed, archived or outputted as a file. A portion of this data can also be sent as a text message with the eDIRECT+ SMS Gateway process.

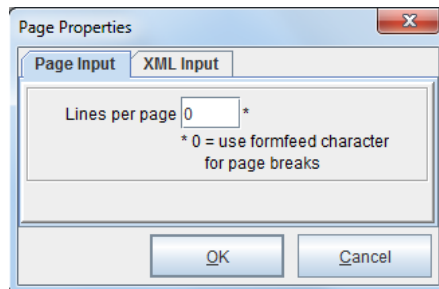
1. To configure the eFORMz Assembly Engine, select File > New Project from the eFORMz Composer.



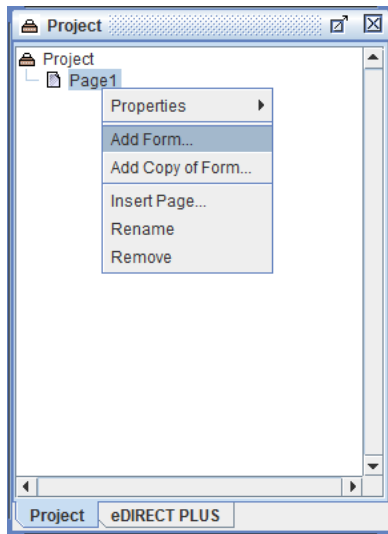
2. Right click the Project and select Add Page.



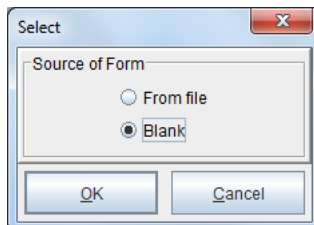
3. Select OK to proceed.



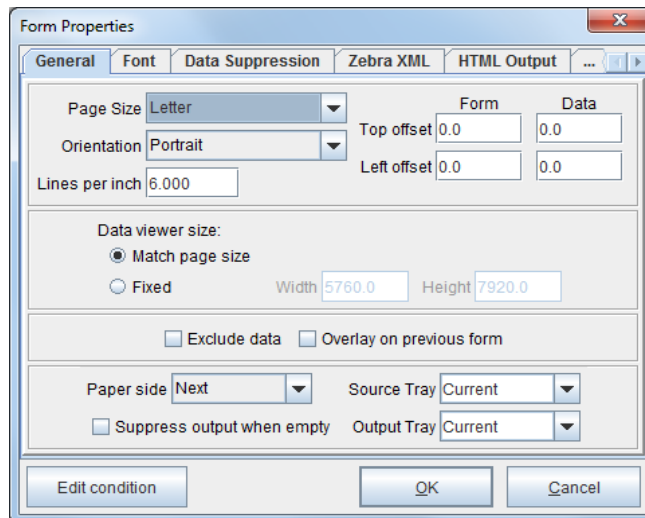
4. Right click the Page and choose the Add Form option.



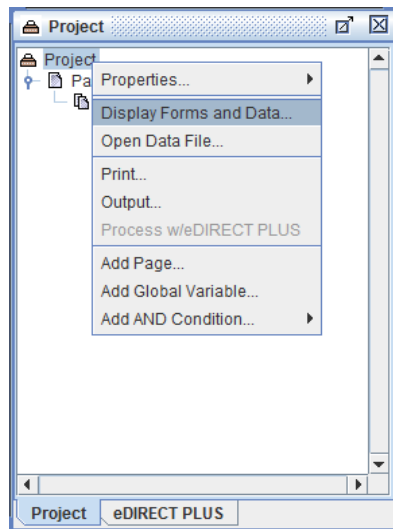
5. Pick the Blank option.



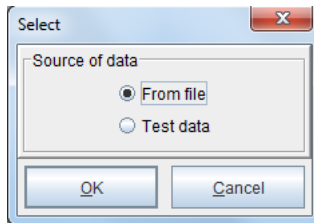
- The Form Properties dialog box will display. Click OK to continue.



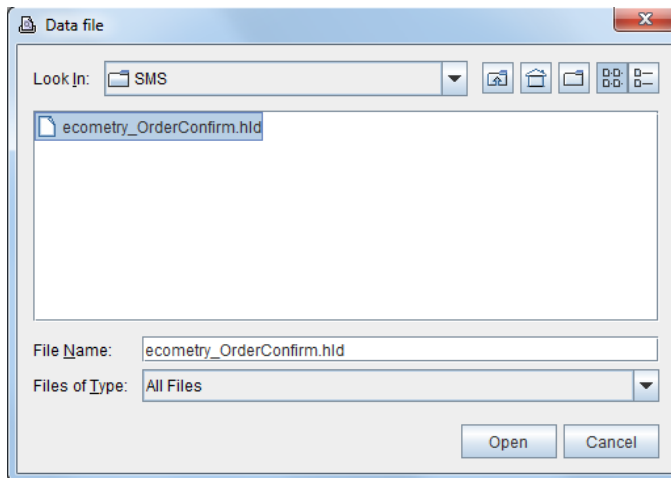
- Right click the Project and select Display Forms and Data.



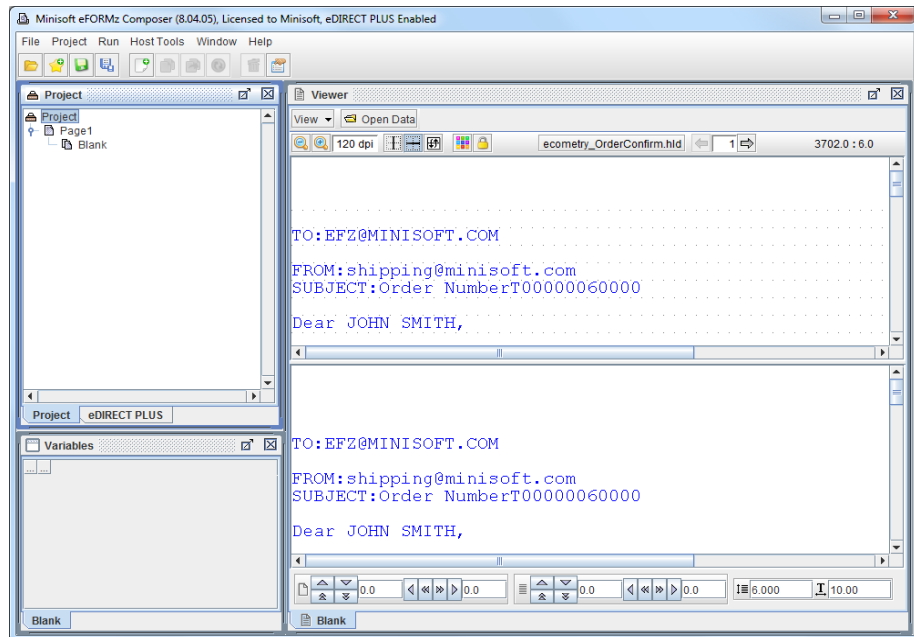
8. Choose the From file option.



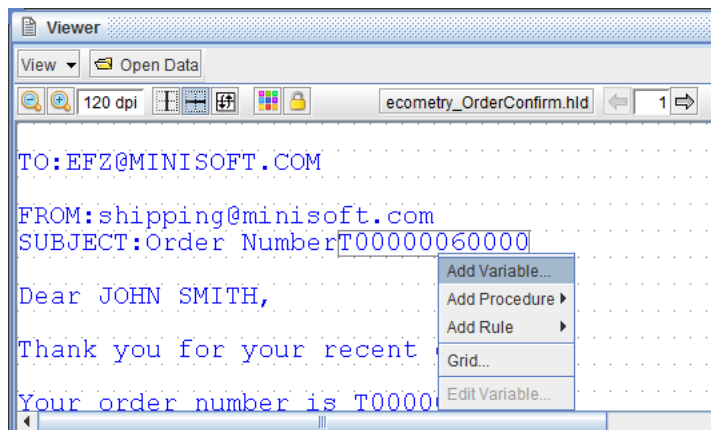
9. Find and open the appropriate data file.



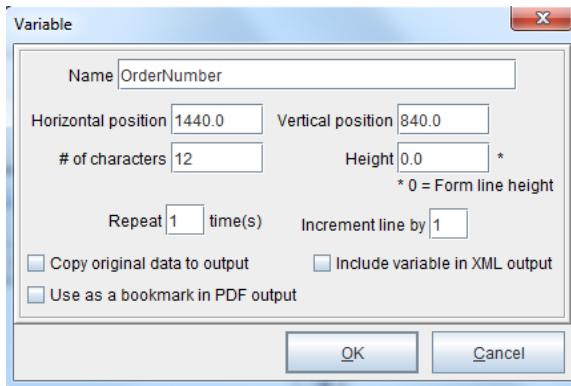
- The Blank Form and data file will display in the eFORMz Composer.



- In the top right Viewer window pane, the incoming data from the file will be showing. To take some portion of this file for use in a text message, a Variable can be created. Left mouse click and drag a given string of characters, then right click and select Add Variable.



12. The Variable dialog box will display. Enter a name and click OK to continue.

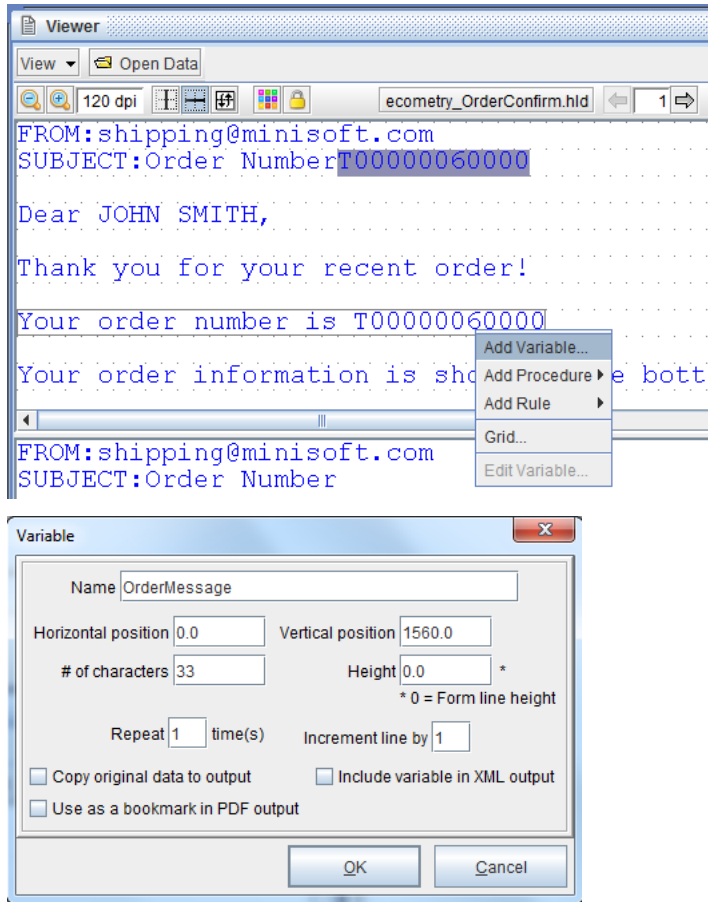


The Variable dialog box is shown with the following fields and options:

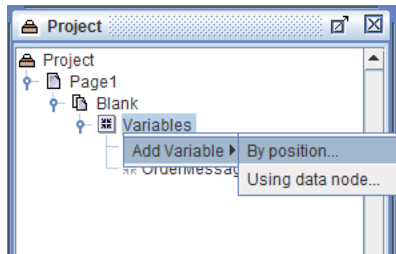
- Name: OrderNumber
- Horizontal position: 1440.0
- Vertical position: 840.0
- # of characters: 12
- Height: 0.0 *
* 0 = Form line height
- Repeat: 1 time(s)
- Increment line by: 1
- Copy original data to output
- Include variable in XML output
- Use as a bookmark in PDF output

Buttons: OK, Cancel

- Repeat the process with any other desired information from the data file.



- To add information from a database lookup, such as a phone number, Right click the Form and select Add Variable > By position.



15. The Variable dialog box will display. Enter a name and click OK to proceed.

The Variable dialog box is shown with the following fields and options:

- Name:
- Horizontal position: Vertical position:
- # of characters: Height: *
- * 0 = Form line height
- Repeat: time(s) Increment line by:
- Copy original data to output Include variable in XML output
- Use as a bookmark in PDF output
- Buttons: OK, Cancel

16. Right click the Variable and select Add Function > SQL Lookup.

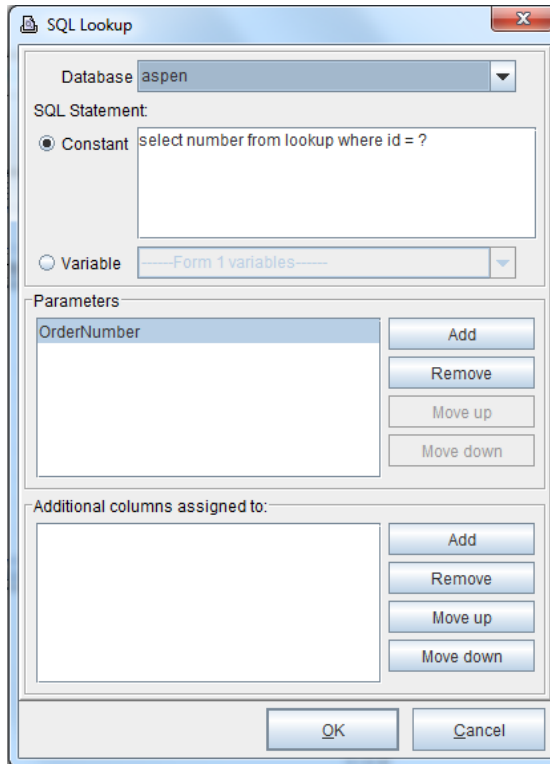
The screenshot shows the eDIRECT+ interface with the Variable dialog box open. The 'Lookup' variable is selected in the Variables list. A context menu is displayed over the 'Lookup' variable, showing the following options:

- Edit...
- Add Function > Concatenate...
- Add Procedure > Insert string...
- Add Rule > Set value...
- Rename
- Remove
- Substring...
- Replace...
- Set value from a declared constant
- Right trim
- Left trim
- Uppercase
- Lowercase
- Table Lookup...
- SQL Lookup...
- Does file exist...
- eVS Barcode Data Generator
- SmartLabel Barcode Data Generator
- Bulk Concatenate

The 'SQL Lookup...' option is highlighted. The background shows the Project tree with 'Page1' > 'Blank' > 'Variables' > 'Lookup' selected. The Viewer shows the following text:

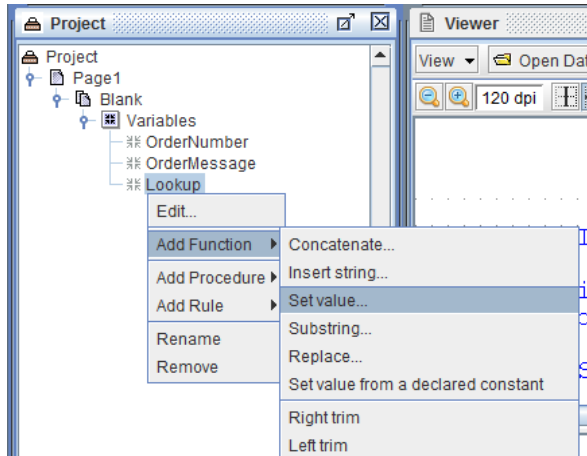
```
FROM: shipping
SUBJECT: Order
Dear JOHN S
```

17. Select the Database, enter an SQL Statement and assign any Parameters or Columns as necessary to return the necessary information.

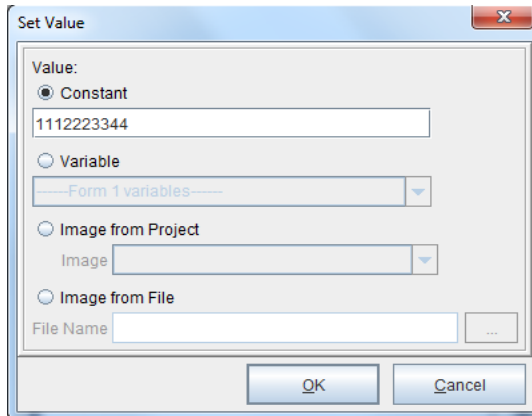


NOTE: To add a database, right click the Project and select Properties > Databases. For more on databases, see the Table Lookup and SQL Lookup parts of the Variable Functions section of Chapter 5: eFORMz Composer Data Customization in the eFORMz/eDIRECT Manual. This is available online at: <http://www.minisoft.com/pages/general/manuals/manuals.html>

18. For purposes of testing, setting the Variable that returns database information as a constant phone number is recommended. Right click the Variable and select Add Function > Set Value.



19. Enter a test phone number in the Value field as a Constant.

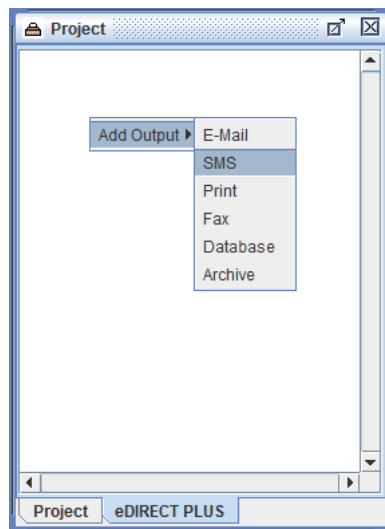


Sending the Text Message

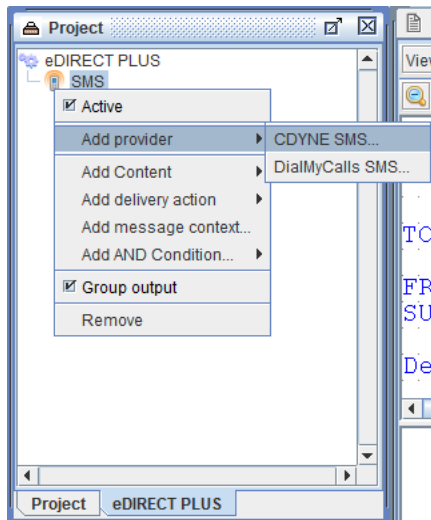
Processing w/eDIRECT+

To send the text message:

1. From the Project window, switch to the eDIRECT PLUS tab. Right click in the window and select Add Output > SMS.

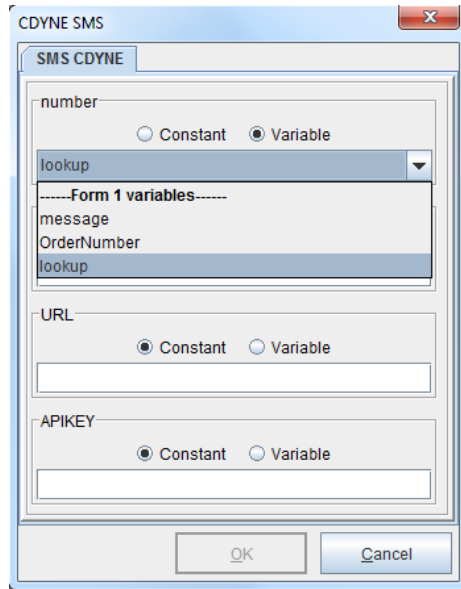


2. Right click the SMS icon and select Add Provider > CDYNE SMS.

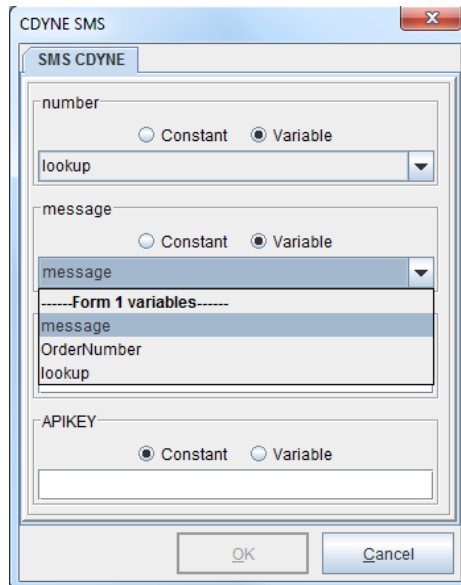


NOTE: Minisoft recommends three SMS Providers: **CDYNE** (<http://www.cdyne.com/>), **DialMyCalls** (<http://www.dialmycalls.com/>) and **SendHub** (<https://www.sendhub.com/>). To learn more about the listed recommendations, it is suggested that their websites be visited for comparison purposes. If a different third party SMS Provider is being used, contact our support team at support@minisoft.com.

3. The CDYNE SMS dialog box will display. In the Number field, select the Variable that contains or returns the phone number information.

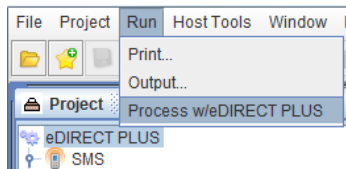


4. In the Message field, select the Variable that contains or returns the message to be sent or enter a Constant value.



- Enter the URL and the API Key provided by the SMS Provider in their respective fields. Click OK when complete.

- Navigate to the eFORMz Main Menu and select Run > Process w/eDIRECT PLUS.



7. The SMS text message will be sent.

