

# FORMAX<sup>®</sup>

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***MailDoc***<sup>TM</sup>  
Beginner 

Installation / Setup Guide  
First Edition

# ***MailDoc***<sup>TM</sup> Beginner

for Microsoft Windows

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FORMAX, Publisher

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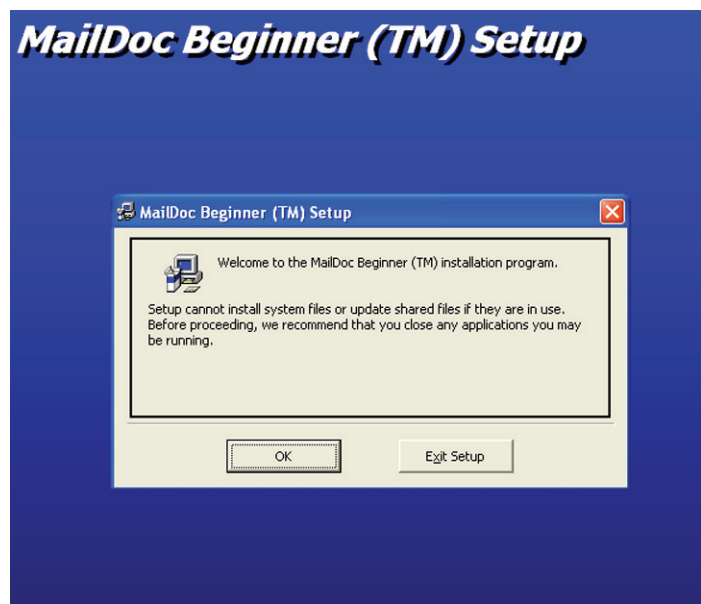


# INSTALLATION

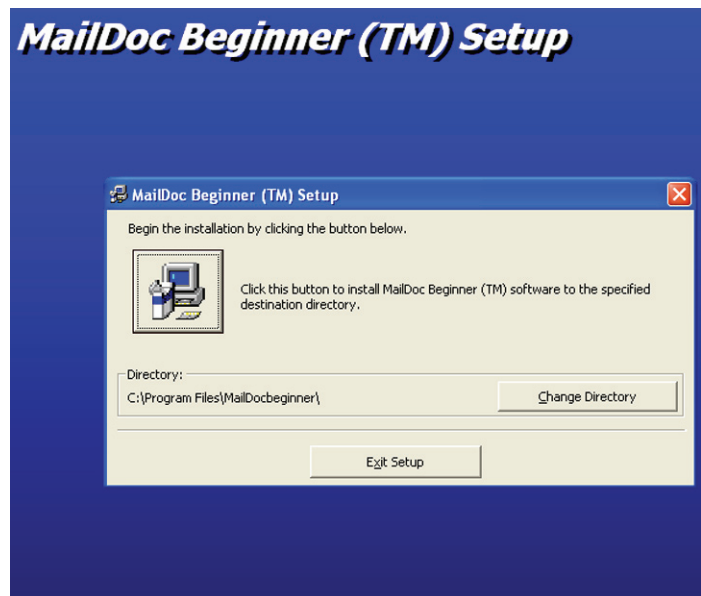
## System Requirements

<i>PC Hardware</i>	<i>Software</i>
Pentium 2GHz PC with 1 GB RAM or higher	Works with any Windows® compatible printer (single printer per seat)
4 GB free hard disk space	Preformatted print data only in PDF format
CD-ROM	PDF Reader
Windows 2000 OS or higher	Java Runtime

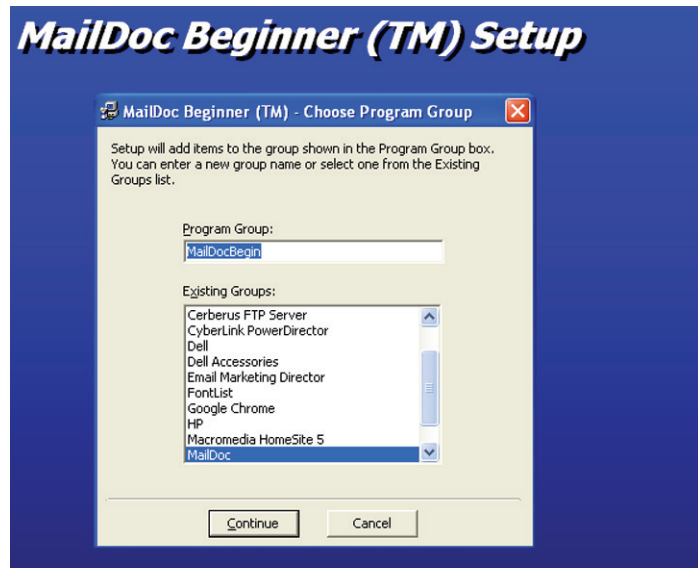
1. Insert MailDoc software disk into CD Drive. (If the disk does not autorun open the CD Drive and select Setup.exe). MailDoc Beginner Setup will open, close any applications running and press “OK” to begin install.



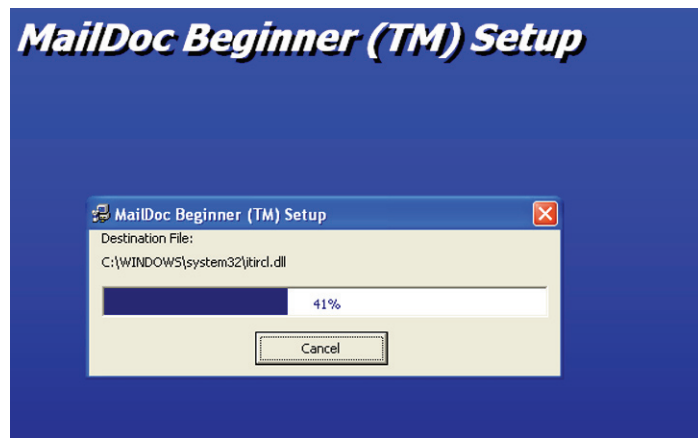
2. Select program directory and then press the computer icon to continue setup.



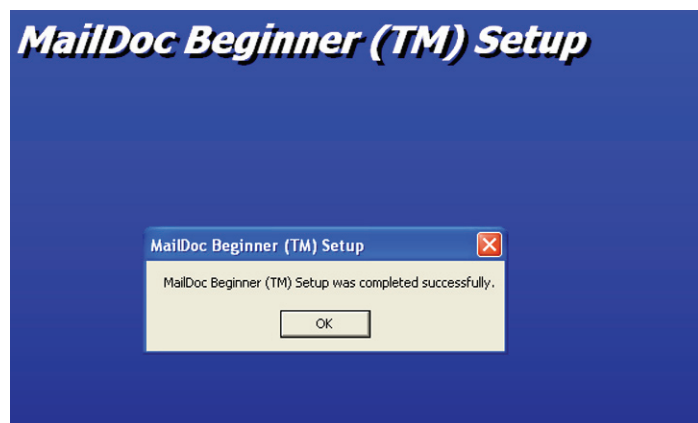
3. Select program group and press "Continue"



4. Installation will begin.

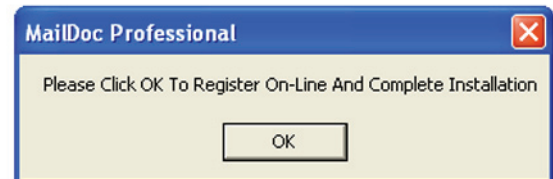


5. Press "OK" when installation has completed to begin using MailDoc Beginner.



# PRODUCT REGISTRATION

To begin using MailDoc Beginner the product must be registered with the Serial Number provided. When first opening MailDoc a registration prompt will be displayed, click "OK" to continue.



Fill out the required registration information and click "Register" to send the information. Upon successfully completing the registration MailDoc Beginner will be ready for use and a confirmation e-mail will be sent.

A larger dialog box titled "MailDoc Registration" with standard window controls (minimize, maximize, close) in the top right corner. The dialog is divided into three sections:

- Registration**: Contains three text input fields for "Serial Number:", "Your Name:", and "Your Email:".
- Company Information**: Contains seven text input fields for "Company Name:", "Phone Number:", "Address 1:", "Address 2:", "City:", "State:", and "ZIP code:". It also includes a dropdown menu for "Country:" with "United States" selected.
- Contact Information**: Contains two text input fields for "Contact Name:" and "Contact Email:".

At the bottom of the dialog are two buttons: "Register" and "Cancel".

## ABOUT MailDoc™ Beginner

**MailDoc™ Beginner** adds OMR or BCR marks to your PDF documents, invoices and statements which are required by OMR/BCR enabled folder-inserters. These OMR/BCR marks tell the folder inserter which documents go together for mailing based on a single identifier. With this software, you can create and save a configuration file or Templates for commonly used documents, enabling re-use of these configurations for commonly performed tasks.

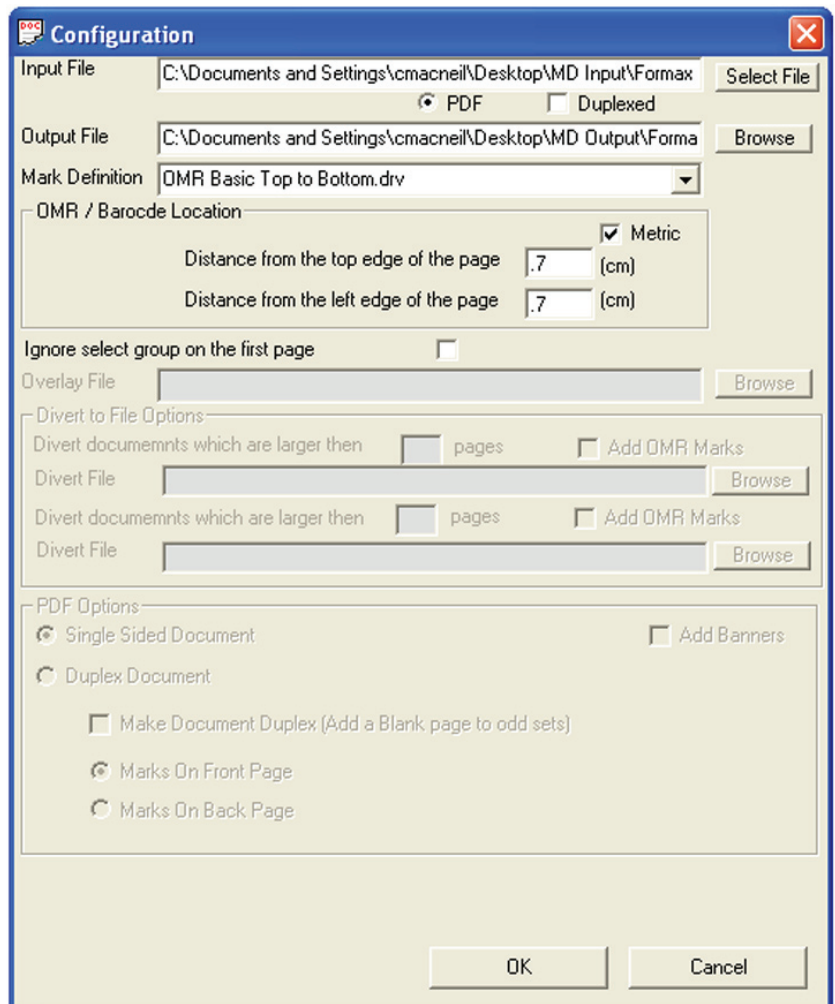


## ADDING MARKS TO THE FILE

Select File/New to create a new job or File/Open to open a previously saved job or template.



The Configuration screen will appear. Use the "Select File" button to find your "Input File" or enter the filename. The "Input File" are your invoices, statements or other documents that you have exported and saved as a text PDF file.





You will also need to enter the following information:

- **Output File:** Enter the filename and location for your processed PDF documents with OMR/BCR added.
- **Mark Definition:** Contains the options of which type of OMR/BCR will be applied to the document, based on the inserter feeding direction.

Mark Definition Options:

“BCR Basic Bottom To Top.drv”:

“BCR Basic Top To Bottom.drv”:

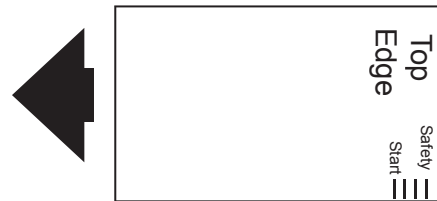
“OMR Basic Bottom to Top.drv”:

“OMR Basic Top to Bottom.drv”:

Top to bottom reading



Bottom to top reading



*Top to bottom is the more common reading direction. In most cases the top edge of the form is leading, using the top to bottom orientation. In cases when the top edge of the form is trailing the bottom to top mark orientation is needed.*

- **OMR/Barcode Location:** This determines where the marks will be physically located on the documents.

When you have made your selections, click “OK” to display imported document.

frmDocumentPDF

Page < 1 > Grouping Criteria  
 Repeating Value  Start Text  End Text

<b>Formax OMR/BCR</b> 44 Ventures Drive Dover, NH 03820 USA  <b>Telephone:</b> 603-749-5807 <b>Warehouse:</b> MAIN		<b>INVOICE</b>  <b>Invoice No.</b> 78381 <b>Customer No.</b> ABCCO	
<b>ABC COMPANY</b> 1 UNIVERSAL LANE CONCORD, NH 03320  <b>Telephone:</b> 603-343-1254 <b>Contact:</b> RICHARD DAVIS		<b>Ship To:</b> <b>ABC COMPANY</b> 1 UNIVERSAL LANE CONCORD, NH 03320  <b>Telephone:</b> 603-343-1254 <b>Contact:</b> RICHARD DAVIS	
<b>Bill To:</b> <b>ABC COMPANY</b> 1 UNIVERSAL LANE CONCORD, NH 03320  <b>Telephone:</b> 603-343-1254 <b>Contact:</b> RICHARD DAVIS	<b>Ship Via</b> YELLOW	<b>I.O.B</b>	<b>Terms</b> NET 30 DAYS
<b>Invoice Date</b> 08/12/2009 <b>Order Date</b> 08/12/2009	<b>SO #</b>	<b>Ordered By</b>	<b>Salesperson</b> <b>Resale #</b>

## SELECTING THE GROUP FIELD

Once your document opens, you will need to select your group field. The group field is the unique information used to determine where a document begins and ends. In this example, the group field is the invoice number. The folder-inserter will know the previous document is complete when it sees a new invoice number.

Select the grouping field by clicking and holding the right mouse button at the top, left corner of the information to be selected, and dragging and releasing the mouse button at the bottom, right corner of the information. A black box will appear around the selected field. The text in the box will be displayed in red.

Select Group

Page <  >
 
 Grouping Criteria  
 Repeating Value  
  Start Text  
  End Text

<p><b>Formax OMR/BCR</b>                  44 Ventures Drive                  Dover, NH 03820                  USA</p> <p>Telephone: 603-749-5807                  Warehouse: M A F</p> <p style="text-align: center;"><b>Bill To:</b></p> <p>ABC COMPANY                  1 UNIVERSAL LANE                  CONCORD, NH 03320</p> <p>Telephone: 603-343-1254                  Contact: RICHARD DAVIS</p> <p>Ship Via: YELLOW      I.O.B.</p>	<h2 style="margin: 0;">INVOICE</h2> <p>Invoice No. <span style="border: 1px solid black; padding: 2px; color: red;">78381</span></p> <p>Customer No. ABC00</p> <p style="text-align: center;"><b>Ship To:</b></p> <p>ABC COMPANY                  1 UNIVERSAL LANE                  CONCORD, NH 03320</p> <p>Telephone: 603-343-1254                  Contact: RICHARD DAVIS</p> <p>Terms: NET 30 DAYS      Salesperson</p>																																	
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Invoice Date</th> <th style="text-align: left;">Order Date</th> <th style="text-align: left;">SO #</th> <th style="text-align: left;">Ordered By</th> <th style="text-align: left;">PO #</th> <th style="text-align: left;">Resale #</th> </tr> </thead> <tbody> <tr> <td>08/12/2009</td> <td>08/12/2009</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <table style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr> <th style="text-align: left;">Order Quantity</th> <th style="text-align: left;">Shipped Quantity</th> <th style="text-align: left;">Tax</th> <th style="text-align: left;">Item Number</th> <th style="text-align: left;">Item Description</th> <th style="text-align: left;">Unit Price</th> <th style="text-align: left;">Extended Price</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>1</td> <td>F 393-8731</td> <td>V of M: Each</td> <td>SAFETY COVER</td> <td>5513</td> <td>5513</td> </tr> <tr> <td>1</td> <td>1</td> <td>F 385-0004</td> <td>V of M: Each</td> <td></td> <td>788</td> <td>788</td> </tr> </tbody> </table>	Invoice Date	Order Date	SO #	Ordered By	PO #	Resale #	08/12/2009	08/12/2009					Order Quantity	Shipped Quantity	Tax	Item Number	Item Description	Unit Price	Extended Price	1	1	F 393-8731	V of M: Each	SAFETY COVER	5513	5513	1	1	F 385-0004	V of M: Each		788	788	
Invoice Date	Order Date	SO #	Ordered By	PO #	Resale #																													
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1	1	F 393-8731	V of M: Each	SAFETY COVER	5513	5513																												
1	1	F 385-0004	V of M: Each		788	788																												

# GROUPING CRITERIA

Grouping criteria can be used when a repeating value is not present on each page. For example, if there is no invoice number available, a date, salutation or page number that is present only on the first or last page of a document can be used to separate each set. In the sample below the page number is used. In this case a box is drawn around the page # field on the document, "Start Text" is selected and "Page # 1" is typed into the "Match Text" field (*Note: the "Match Text" field is case sensitive.*).

The screenshot shows a software window titled "frmDocumentPDF". At the top, there is a "Page" navigation bar with a dropdown menu set to "1". To the right of the page bar is a "Grouping Criteria" section with three radio buttons: "Repeating Value", "Start Text" (which is selected), and "End Text". A "Match Text" field contains the text "Page # 1". Below this is a table with the following data:

Invoice Date	Order Date	SO #	Ordered By	PO #	Rec'd #	
08/12/2009	08/12/2009					
Order Quantity	Shipped Quantity	Tax	Item Number	Item Description	Unit Price	Extended Price
1	1	F	393-8731	V of M: Each	5513	5513
			SAFETY COVER			
1	1	F	385-0004	V of M: Each	788	788
			CLUTCH HANDWHEEL BASE PLATE			
1	1	F	393-8731	V of M: Each	5513	5513
			SAFETY COVER			
1	1	F	385-0004	V of M: Each	788	788
			CLUTCH HANDWHEEL BASE PLATE			
1	1	F	382-0009	V of M: Each	1.69	1.69
			HOOK VELCRO PAD			
1	1	F	393-8731	V of M: Each	5513	5513
			SAFETY COVER			
1	1	F	385-0004	V of M: Each	788	788
			CLUTCH HANDWHEEL BASE PLATE			

Print Date 08/13/2009  
Print Time 02:32:13 PM  
Page 1

Please Make Payment to: Formax OMR/BCR  
44 Ventures Drive  
Dover, NH 03820  
USA

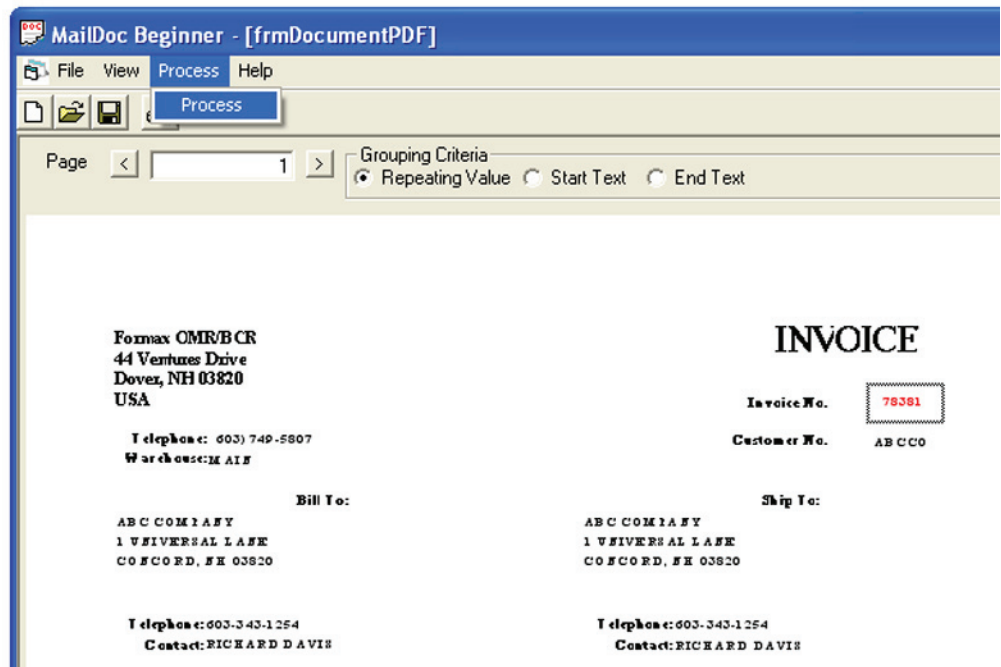
## SAVING YOUR SETTINGS

You can save your job by using the “File/Save”, “File/Save As” or “File/Save Template” options. “Save” or “Save As” will save the file with all OMR/BCR settings along with input and output file settings. “Save Template” saves just the OMR/BCR settings without the input and output settings for use with other input and output files, eliminating steps and saving time for recurring jobs that have the same layout but with different data.

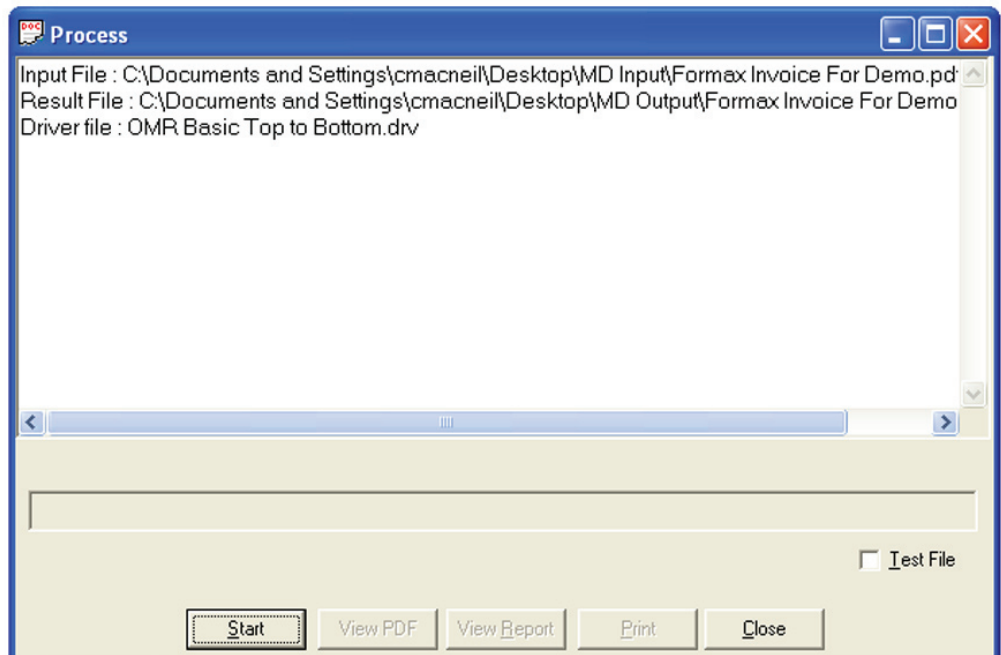


# PRODUCING THE MARKED DOCUMENT

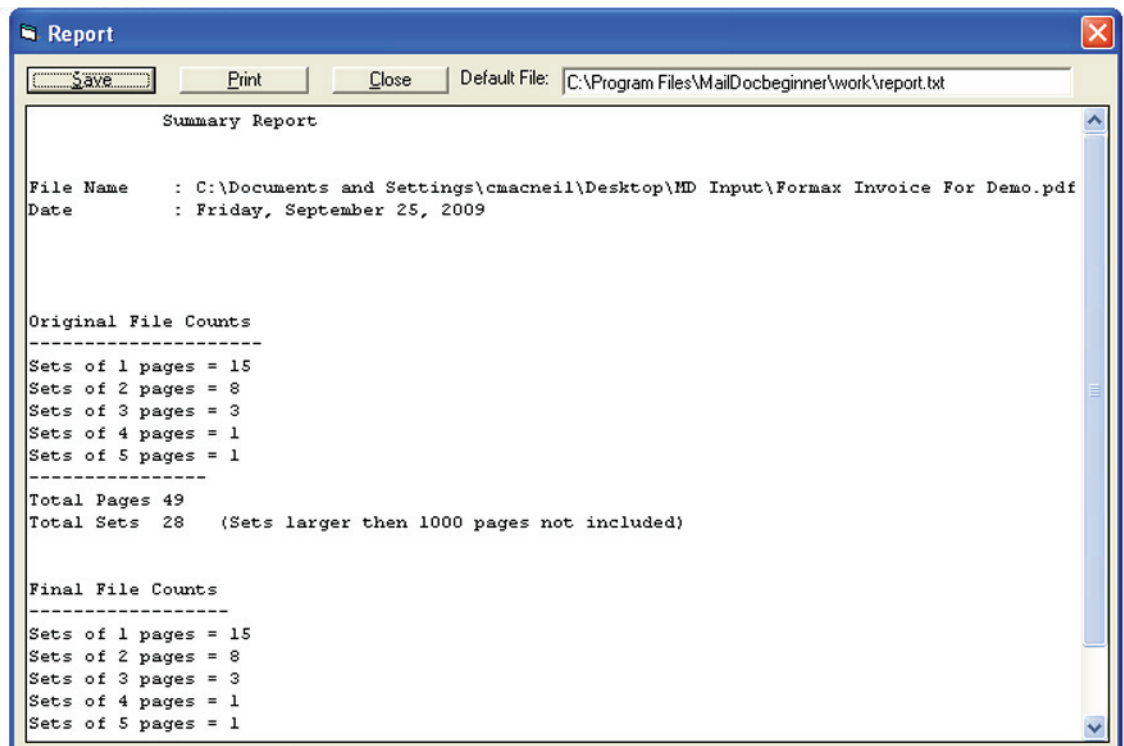
To process your document, select Process from the menu bar.



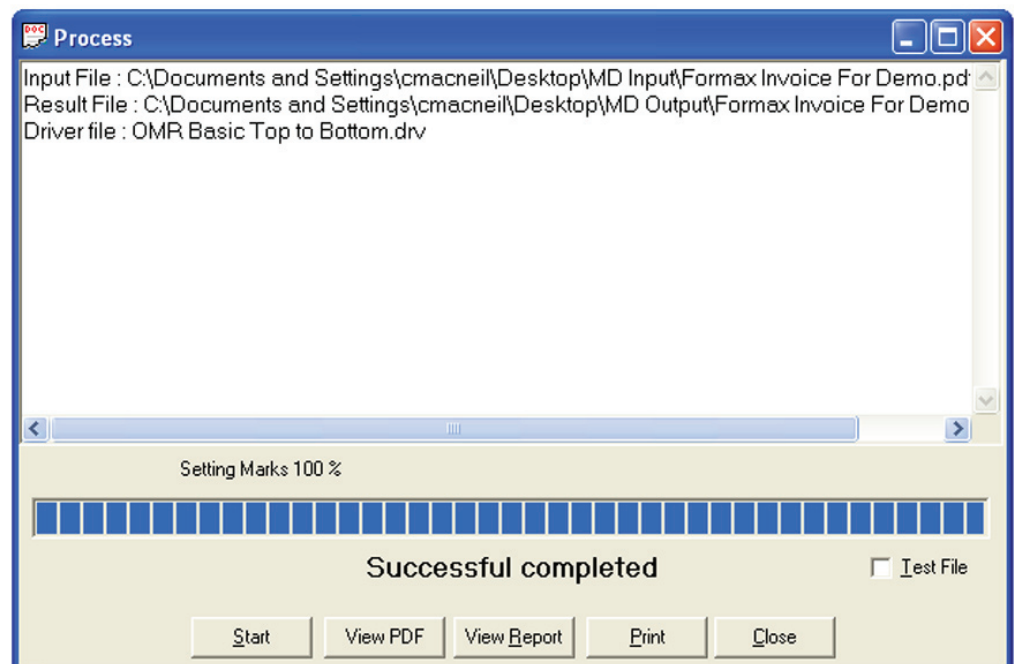
Once the Process screen appears, you can click Start to generate the appropriate marks in the output file. Selecting the Test File check box will generate comments beside each mark describing the marks' instruction.




The Summary Report will appear on the screen once the file has been processed and marks have been added. The Summary Report for this job is displayed below. The report can be printed and/or saved. Close the screen when finished.



From the Process screen the PDF of the processed file can be viewed by pressing the "View PDF" button.

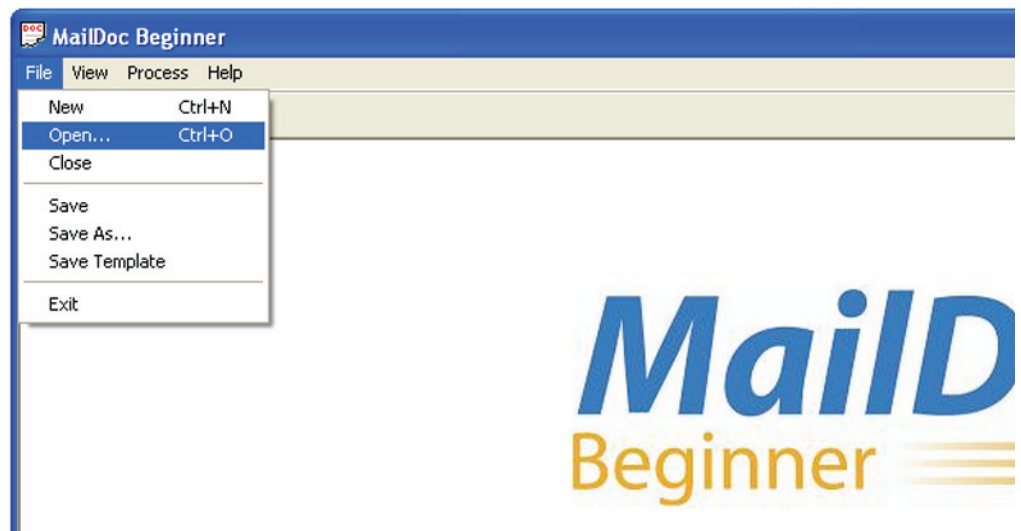


The top of the sample PDF output file is shown below. The marks added by the software have been highlighted.

	Formax OMR/BCR 44 Ventures Drive Dover, NH 03820 USA	<b>INVOICE</b>			
	<b>Telephone:</b> (603) 749-5807 <b>Warehouse:</b> MAIN	<table border="1"><tr><td><b>Invoice No.</b></td><td>78381</td></tr><tr><td><b>Customer No.</b></td><td>ABCCO</td></tr></table>	<b>Invoice No.</b>	78381	<b>Customer No.</b>
<b>Invoice No.</b>	78381				
<b>Customer No.</b>	ABCCO				
<b>Bill To:</b>		<b>Ship To:</b>			
ABC COMPANY 1 UNIVERSAL LANE CONCORD, NH 03820		ABC COMPANY 1 UNIVERSAL LANE CONCORD, NH 03820			
<b>Telephone:</b> 603-343-1254 <b>Contact:</b> RICHARD DAVIS		<b>Telephone:</b> 603-343-1254 <b>Contact:</b> RICHARD DAVIS			





## Opening Saved Files and Templates

To open a saved file or template, select “Open” from the File Menu.



## OMR MARK POSITIONS

This processed "Test File" PDF displays the name of each mark listed next to the mark. This example shows basic OMR laid out top to bottom.

<p>  Start   Accumulate/Insert   Parity   Safety         </p> <p>           Formax OMR/BCR            44 Ventures Drive            Dover, NH 03820            USA         </p> <p> <b>Telephone:</b> (603) 749-5807  <b>Warehouse:</b> MAIN         </p>	<h3>INVOICE</h3> <table border="1"> <tr> <td><b>Invoice No.</b></td> <td>78381</td> </tr> <tr> <td><b>Customer No.</b></td> <td>ABCCO</td> </tr> </table>	<b>Invoice No.</b>	78381	<b>Customer No.</b>	ABCCO
<b>Invoice No.</b>	78381				
<b>Customer No.</b>	ABCCO				
<table border="1"> <tr> <td style="background-color: #e0f0ff;"><b>Bill To:</b></td> </tr> </table> <p>           ABC COMPANY            1 UNIVERSAL LANE            CONCORD, NH 03820         </p> <p> <b>Telephone:</b> 603-343-1254  <b>Contact:</b> RICHARD DAVIS         </p>	<b>Bill To:</b>	<table border="1"> <tr> <td style="background-color: #e0f0ff;"><b>Ship To:</b></td> </tr> </table> <p>           ABC COMPANY            1 UNIVERSAL LANE            CONCORD, NH 03820         </p> <p> <b>Telephone:</b> 603-343-1254  <b>Contact:</b> RICHARD DAVIS         </p>	<b>Ship To:</b>		
<b>Bill To:</b>					
<b>Ship To:</b>					

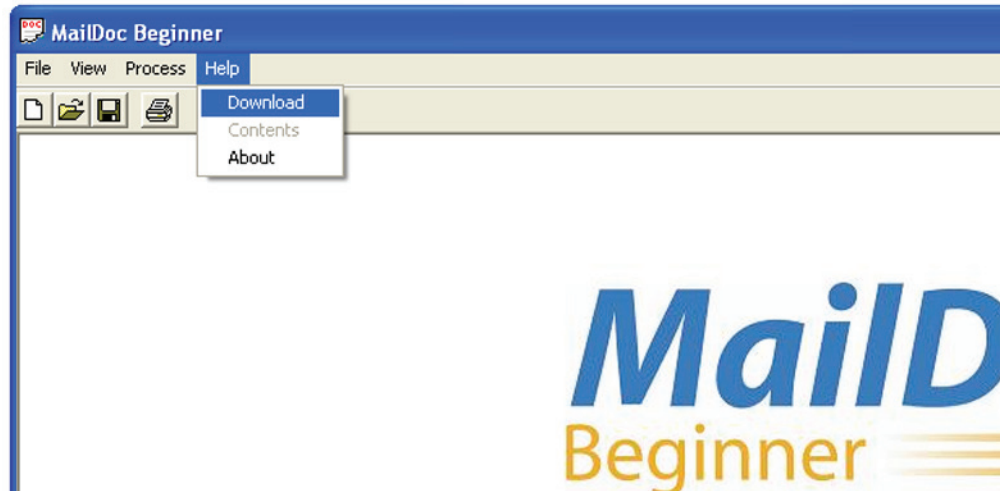
## MARK DEFINITIONS

<b>Start</b>	On every page, defines the beginning position of the OMR code.
<b>Accumulate/Insert</b>	Determines if additional pages are to be pulled or if the set is complete. No mark present = Accumulate; Mark present = Insert.
<b>Parity</b>	A parity mark ensures that the number of marks on the page are even.
<b>Safety</b>	On every page. Provides extra security, primarily used for paper skew, if the safety mark is not read an error code will be displayed on the inserter.



# Product Updates

Product updates are available periodically to enhance the product performance. To access updates, a password must first be obtained through Formax. Press the Help button and select "Download" from the drop down menu.



Enter the password and follow the on-screen directions to complete the download.



