

Create!form®

Design and Deliver Custom Documents from ERP and Business Application Output

The Create!form suite - featuring Create!form Designer® and Create!form Director™ - is a powerful, next-generation e-forms solution for formatting, personalizing and delivering ERP and business application output. A true enterprise-class application, Create!form converts standard application output into more attractive, functional and efficient electronic documents, then intelligently distributes them over a variety of delivery channels including print, fax, email or the Web.

Create!form Designer for Advanced Document Composition

Create!form lets you quickly and easily customize document output from your software applications using a WYSIWYG "drag and drop" process. As part of the Create!form authoring suite, Create!form Designer enables users to create custom invoices, statements, checks, purchase orders and other documents, without ERP programming or application changes.

With Create!form Designer, users can add logos, graphics, barcodes, signatures, colors, fonts and conditional logic to forms. The intuitive graphical design interface allows nearly anyone in your organization, even non-IT staff, to design their own forms, giving control to those who understand the document best.

To define a data value, simply select the data to be mapped from the original output, and drag it to the desired location in the new design. Customize font, size, color, shading, orientation/rotation, justification and more. Create!form Designer lets users dynamically remove leading, trailing spaces and blank lines, such as an address block where no data is provided. "Document sets" or individual documents within a batch run are easily defined by flagging a change in value, a page delimiter or any other customizable data condition within the output file.

Create!form Designer Features

Live Preview - As data is mapped from the source file to the new document, Create!form automatically displays the new content on the screen, including all customized elements. To save time and streamline form design, the user can scroll through the source file sample and see instantly how the varying data affects the custom output.

Input Support - Create!form Designer accepts standard host application output using XML, CSV and generic ASCII formats.

Design Templates and Forms Library - Create!form Designer comes standard with a variety of sample form projects. These templates can be applied directly to standard output to streamline form design and composition.

“Implementing Create!form has given us control over our own destiny. We can respond to internal and external output needs far more quickly, and with greater efficiency than when we relied on an outside vendor. The benefits extend from our underwriting, accounting, customer service, output and production departments, all the way out to our agents and insureds. Our return on investment goes beyond dollars and cents – Create!form has enabled us to upgrade our response time as well as our image to the outside world.”

George Jeffers
Commerce West
Director of IT

“With Create!form we have substantially improved our responsiveness to customers. By enabling us to design attractive, high-quality packing slips, invoices and other documents, our output quality went up 1,000%.”

Deeley Harley-Davidson Canada
Senior Application Manager

Barcode Insertion - As a standard feature, users can implement barcodes in purchase orders, inventory pick slips and other documents. Choose from a variety of barcode standards such as Code 39, UPC, EAN, Code 2 of 5 and 128, along with two-dimensional barcodes, including PDF 417 and MaxiCode.

Barcodes may be assigned as a static value or can derive a value from variable data within the host application output or an ODBC database. Create!form Designer automatically calculates the associated check digits, guards, and start and stop codes.

Conditional Design Logic - Allows users to manipulate report data and personalize document output formatting based on specific audiences and delivery preferences. Data may be added or suppressed, and design elements, including logos, site addresses and marketing messages can be customized by recipient, all without requiring changes to the original output.

Variable subforms can also employ conditional logic. Subforms can be created and dynamically linked to any number of master forms, and are typically employed for frequently used information such as logos, addresses or signatures. When the time comes to change an address, fax number or logo, simply update the shared subform and all linked output is instantly updated.

ImageServer Utility - Working directly with the Variable Subform function, Create!form's Image Server utility automatically converts .jpg, .gif and .tif files into subforms, ready for dynamic inclusion in formatted documents. This utility streamlines the process of adding items such as product images, scans and signatures into documents.

Document Repagination - Dynamically adjusts document length by repaginating output based upon incoming data. This feature reduces the total amount of document pages required to print, leading to reduced costs for toner, paper and other handling tasks, as well as reduced file, email attachment and archive sizes, and reduced fax delivery charges. Document repagination functionality includes:

- Automatic processing and accounting for repeating line-item data
- Document set-based repagination
- Autosizing of page sections to minimize excessive white-space

ODBC Look-up Variables - Assign look-up variables from within Create!form Designer to add data directly to the document. Look-up variables leverage ODBC to access local or networked databases, and can also be used in conjunction with the user variables functionality. Simply name the variable and indicate which field will be pulled from the database. The variable can be inserted anywhere in the document.

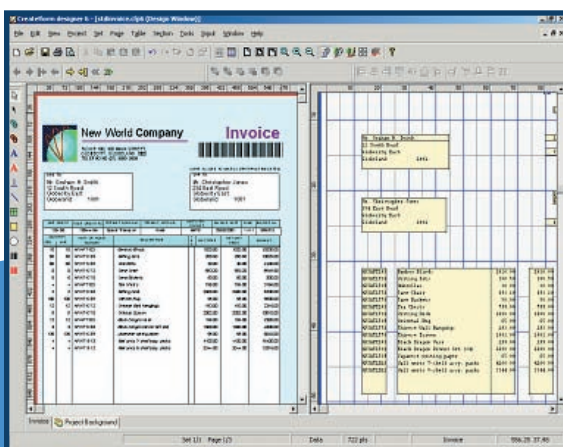
Intelligent Tables - Bottomline's intelligent table capability allows the sorting of line-item output by product number, product name, weight or another specified data variable without making changes to the application, as well as dynamic sub-totaling on page breaks and groups, capabilities that enable both internal and external users the ability to search for and find documents.

Data Calculations - Use Create!form Designer's expression builder and user variable functions to add data calculations to document output. Perfect for items such as page sub-totals in repaginated documents, tax rate conversion and more.

Dynamic Page Insertion - Dynamically insert pages from external applications using EPS format conversion.

MICR Check Printing - Create!form Designer lets users accurately map and output Magnetic Ink Character Recognition (MICR) data, eliminating the use of costly pre-printed check stock using the optional Create!micr™ module.

Environment Variables - Dynamically change output content without requiring a separate project. This feature is ideal for applying watermarks to archived documents and more.



Create!form Designer's easy-to-use graphical interface lets users assign variables and customize output in a single step. Users begin by importing application output from the host system. The file (original application output) is displayed on the right side of the screen, allowing the user to map their data directly to the "blank canvas" on the left.

Flexible Project Formatting Controls - The Page Style Rules feature enables users to create event tables for page types including first page, continuing page, last page and more. Background forms can be added instantly for fast and easy OMR mark formatting.

PDF Proofs - A merge preview feature lets users create PDF "proofs" of final document output from within Create!form Designer.

Additional features of Create!form Designer include a project wizard, built-in object alignment tools, a spell checker, thumbnail and multi-page document previews, date and data format controls, project/data trees and more.

Create!form Director for Automated Document Delivery

Create!form Director is an easy-to-use application for users to define the transactional document and process workflow of their application output. Using this solution, organizations can significantly improve the efficiency of their business document distribution, converting manual distribution processes into automated electronic processes.

Create!form Director enables administrators to define, route and deliver documents to their point-of-need for automated printing, faxing, emailing, archiving or electronic payment. The easy-to-use tool set helps users configure rules that trigger the splitting of a single, large spool file into numerous documents, extract data from documents for other applications to use, and distribute documents to multiple queues and locations without modifying existing software.

Create!form Director Features

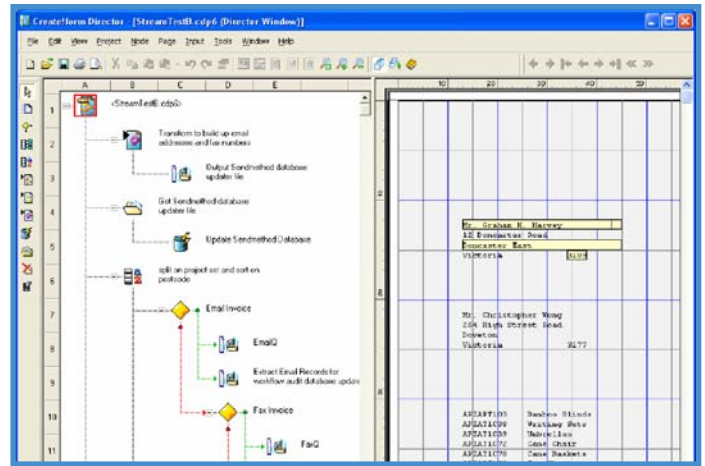
Intuitive Interface - Windows-based interface for configuring, routing and processing documents. No complex coding required.

Visual Workflow Variable Mapping - Access visual document variable mapping from within Create!form Director for streamlined process modeling. No need to rely solely upon row, column or depth data, or to switch between applications.

Point-and-Click Expression Building - Replace time-consuming manual coding within your document formatting application with simple, point-and-click expression building.

Output Destination Management - Direct multiple copies of documents to email, fax, archive or networked printer(s) according to document content or other user-definable business rules.

ODBC Look-up - References external databases for document-specific delivery parameters, including delivery preference, email/fax addressing, account information and contact details.



Visual document variable mapping can be accessed directly from within the Create!form Director application for streamlined process modeling.

Document and Data Handling Functions

- **Split** spool files according to user-specified rules or variables, such as invoice number, check number, state/province, country or other data variables.
- **Deliver** collated or uncollated documents to the same location or to a secondary one. For example, archive copies of invoices on the finance server while printing copies of payment records on the personnel printer.
- **Distribute** split or copied documents to any output queue based on conditions within the data. Direct pick slips straight to the warehouse or deliver historical documents to the archive.
- **Transform** input data into any ASCII-based output format (i.e. ASCII, CSV, XML, HTML, etc.) from within Create!form Director. Use this feature to create and deliver data to databases, assemble detailed audit reports, print to line printers or export data to other applications.
- **File manipulation** functions allow temporary files to be created, renamed, moved and deleted. This can be used to carry data over separate jobs and to create temporary files for validation and error handling.
- **Send** output directly to ftp and http destinations.
- **Database Updates (Optional)** - Defined Create!form workflow can include the addition and modification of application databases via ODBC connection using any defined data or user variable. The database update feature is ideal for applications requiring address verification, mail sorting, audit handling or for data carried over separate print jobs.
- **PDF Publishing (Optional)** - Directly reformat or merge incoming spool files with a form project created in Create!form Designer and publish into a specified directory as a PDF, PostScript or PCL file with full control over the file name. This feature provides tight integration with third-party products, including document and content management solutions.

Create!form Server and Output Destinations

Runtime Operation

After form design is completed and logic is added to each document using Create!form Director, the project is transferred to the Create!form Server using the Tools/Transfer menu within Create!form Director. Create!form Server can run on any Windows 2000/2003 server and handles all job requests sent to the printer queue as a back-office operation.

An efficient and effective "traffic cop," Create!form Server determines where your Create!form-enhanced application output will be delivered based on Create!form Director user-defined rules. Jobs from OS/400, UNIX, Linux and Windows host systems can be easily configured using Create!send™. Seamless integration with the Windows spooling environment allows direct access to the print queue properties and document handling options. Documents in error are held on the print queue, and can be restarted once the problem is identified and corrected.

Post-Runtime Features

Reprint Management

Once output has been generated, a built-in reprint management utility lets users search, select and reprint documents on the same physical printer, or on a different printer entirely. Document life span is defined by the administrator, up to 30 days. Standard document reprint options include search, view, reprint, redirect, pause, resume and cancel.

System Maintenance

Upgrades, modifications and maintenance can be performed centrally on the server and changes can be implemented immediately. For extensibility and increased throughput, multiple queues can be configured to increase performance. In addition to available development service licenses, administrators have the option of using a different output queue to test scripts before deploying to the production directory.

ERP Migration Protection

The Create!form authoring suite helps your organization manage data or application changes through the simple creation of new data maps to suit the new application output, ensuring rapid migration of existing Create!form documents.

Output Destinations

Create!form, including its Designer and Director interfaces, enables personalized output to be automatically distributed to a number of advanced delivery channels. Each destination is modular: simply choose the modules that your organization needs today, and add on as your requirements change. Create!form output destinations include:

Transactional Document Modules

- **Create!email®** - Emails document output automatically to recipients in real-time as a PDF attachment, embedded PDF hyperlink or email body text.
- **Create!fax®** - Integrates with fax server software to deliver documents to a fax destination, using fax numbers retrieved from the base document or an external ODBC database reference. Cover sheet content can be personalized by recipient.
- **Transform™ Content Center** - A Web-based digital archive of all your final documents, including full indexing and secure, online self-service search and retrieval.

Transactional Payment Modules

- **Create!form ACH** - Works with Create!form Director to provide secure, NACHA-compliant, electronic payment transmission for business-critical vendor and employee payments.
- **CheckDefense™** - Advanced Positive Pay technology protects your MICR check printing environment from check fraud.

System Requirements

For complete details on the hardware and software platforms required and supported by Create!form, please call 800.472.1321 (option 2) or email info@bottomline.com to be connected to a representative in your region.



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