Setting Up PlanetPress Suite

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About PlanetPress Suite

ECI partners with Objectif Lune, which lets us offer you the variable data printing solution PlanetPress Suite. Documents created with PlanetPress Suite can be printed, archived, emailed, and faxed as part of a sophisticated output management application driven by PlanetPress Watch or PlanetPress Server. This provides significant savings on printing costs, as well as greater work process efficiency.

PlanetPress Suite enables easy creation and printing of transactional variable content documents in-house, eliminating the need for preprinted forms. These in-house documents can be produced using any printer, so there is no need to dedicate a printer just for forms. ECI offers customization of several forms, including invoices, statements, delivery tickets, purchase orders, and more. All documents can be generated from the same data file used to create an invoice, so you only have to enter information once.

Before You Begin

Before you can begin using PlanetPress Suite, you must:

- Ensure your system meets the minimum requirements.

- Download and install PlanetPress Suite on a dedicated machine.

- Activate PlanetPress Suite at https://www.objectiflune.com.

- Contact ECI OP Installations to receive the necessary formats and overlays to use with PlanetPress.

- Set up and configure the PlanetPress Office Configuration window.

System Requirements

Note: The login for PlanetPress and the hosted machine must be the same.

The PlanetPress software must be installed on a **dedicated** machine within your network. It cannot be installed on a Terminal Server, Domain Controller, or your JumpTrack® machine. It cannot be a hosted machine. The machine must physically reside in your building. If you plan to fax, the machine on which you install PlanetPress must have a modem or phone line attached to it, and it must have MS Fax installed.

You must also have an ODBC connection for SQL in Windows or on your machine. Once PlanetPress is installed, check the ODBC connection in PlanetPress to make sure that it is using the correct one.

Note: The following requirements are taken from https://www.objectiflune.com. Do not take the following requirements at face value on all occasions. In many cases, the minimum requirements are more than enough, while in others, the recommended requirements can barely keep up with a demanding implementation.

Recommended Hardware Requirements

PlanetPress hardware requirements are the same as those recommended by the Operating System on which PlanetPress is running. This means that your hardware should be similar to the following:

- Dual Core CPU or Better

- 4 GB of RAM

- 10 GB of Available Hard-Disk Space on SATA or SCSI Drive

- 1920x1080, 32-Bit Color Graphics Card

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Supported Operating Systems

PlanetPress supports the following operating systems:

Note: Home versions of any kind are not supported.

- Windows Server 2012

- Windows Server 2012 R2

- Windows 10 Professional (recommended).

Downloading and Installing PlanetPress (On the PlanetPress Machine)

The PlanetPress software must be installed on a **dedicated** machine within your network. It cannot be installed on a Terminal Server, Domain Controller, or your JumpTrack® Machine. It cannot be a hosted machine. The machine must physically reside in your building. If you plan to fax, the machine on which you install PlanetPress must have a modem or phone line attached to it, and it must have Microsoft® Fax installed.

PlanetPress can be installed on the DDMS®/DDMSPLUS® machine or on another dedicated server. You cannot install the software on a terminal server or on a domain controller.

To download and install the software:

1. Go to https://www.objectiflune.com/WebActivationManager/.

Note: You can find your customer number and password in your PlanetPress welcome emails sent from DDMS/DDMSPLUS.

2. Click the customer Number box and enter your customer number.

3. Click the Password box and enter your password.

4. Click Login.

5. Click Downloads.

6. Click ⬇ next to PlanetPress Suite V7 Offline Installation.

7. Follow the prompts to complete the download. Be sure to save the .EXE file in an easily accessible location.

8. Once the download is complete, right-click the .EXE file and select Run As Administrator.

9. Follow the prompts to begin installation.

10. When you are prompted to select the items to install, select the option that matches your license. Licenses issued from 2014 on are for PlanetPress Production. Older licenses may be PlanetPress Office instead. Check your licensing documentation to see which workflow tools are included in your package.
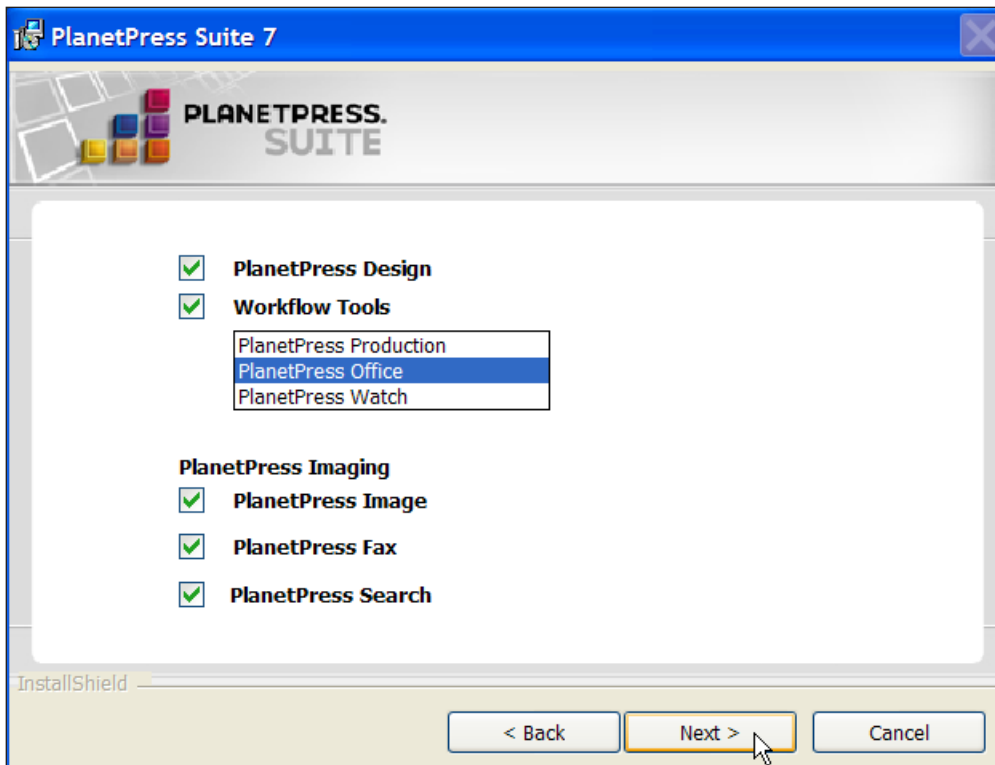
11. Check all of the boxes.

12. Click Next.

13. Follow the additional prompts to complete the installation.

Note: PlanetPress installs the following: Configuration, Design, Fax Configuration, and Image Configuration.

Activating the PlanetPress Software

After you download and install the software, you must activate the software on the PlanetPress machine through the PlanetPress website.

Note: You must activate your software within 30 days of installation. If you do not, you must contact Objectif Lune for activation.

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1. From your desktop, double-click . PlanetPress Designer opens.

2. Click the Help tab and select . The PlanetPress Activation dialog box opens.

   The activation number displays in the Magic Number box. Record the Magic Number exactly as it is shown. This number is required to activate the software.

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3. Click the Web Activation link. The Objectif Lune Web Activation Manager window opens.

4. In the Login section, click each box and enter the following information:

   - **Customer Number:**   Enter your customer number exactly as it appears on the email sent to you by DDMS.

   - **Password:**   Enter your password exactly as it appears on the email sent to you by DDMS.

Note: Contact ECI OPS installations if you have not received the email containing your Customer Number and Password.

5. Click Login.

6. When prompted, enter your email address, followed by your contact information.

7. When the Product Activation section opens, click Software License.

8. Click ⊞ next to each software item on the list.

9. Enter the Magic Number in the Magic Number box. Be sure to enter the number exactly as it appeared in PlanetPress Designer.

10. Click ☑. The text Activate displays in the Action column.

11. Repeat **Steps 9-10** to activate each software item shown.

12. Next, click Submit Requested Changes. .Reg displays in the File Column.

13. Click .reg for each product shown, then click Run to open the product's Registry.

14. At the Are You Sure prompt, click Yes.

15. Close the Designer window and reopen it to ensure that it is authorized. The message about the software expiring should be gone.

Installing and Activating PlanetPress Design (on Client Machines)

You can also install PlanetPress Designer on additional computers using the same installation steps with minor exceptions, as noted below.

1. Go to https://www.objectiflune.com.

2. Select your country, if prompted, and click OK.

3. Click Download and select Download Software. The Download PlanetPress Suite's Latest Version page opens and prompts you to enter your PlanetPress Suite License Serial Number.

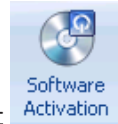**Note:**   Your serial number is found in your PlanetPress welcome emails sent from DDMS.

4. Enter your serial number in the following format: **XXXXX-XXXXXX-XXX**.

5. Click Submit. The PlanetPress Suite page opens.

6. Click Download and follow the prompts to complete the download. Be sure to save the .EXE file in an easily accessible location.

7. Once the download is complete, double-click the .EXE file to open it.

8. Follow the prompts to begin the installation.

9. When you are prompted to select the options to install, clear all options **except** PlanetPress Design.

10. From your desktop, double-click . PlanetPress Design opens.
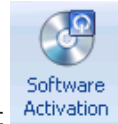
11. Click the Help tab and select . The PlanetPress Activation dialog box opens.

    The activation number displays in the Magic Number box. Record the Magic Number exactly as it is shown. This number is required to activate the software.

12. Send your Customer Number, Magic Number, Software Version, and Serial Number to activations@ ca.objectiflune.com and request an activation for use with the client machine.

Starting PlanetPress Services

1. From your desktop, double-click . If this is an initial setup, the PlanetPress Suite Services dialog box automatically opens with the Local System Account box checked. Clear the Local System Account box.

    If this is not an initial setup, click the Tools tab, and select Configuration Services.

Notes: If your DDMS server is hosted by ECI, use the DDMS Desktop User (DDMS plus your account number). If your system is on-premise, use the administrator user on the DDMS server. The administrator user must have the same username and password used by TBL server to log in. To find your TBL server login, in TBL Configuration on the DDMS server, click File and select Auto Login Setup.

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2. Enter the domain, user name, and password for the administrative user for the machine or the domain in the appropriate boxes.

3. Re-enter the password in the Confirm Password box.

4. Check the Services Start Automatically box.
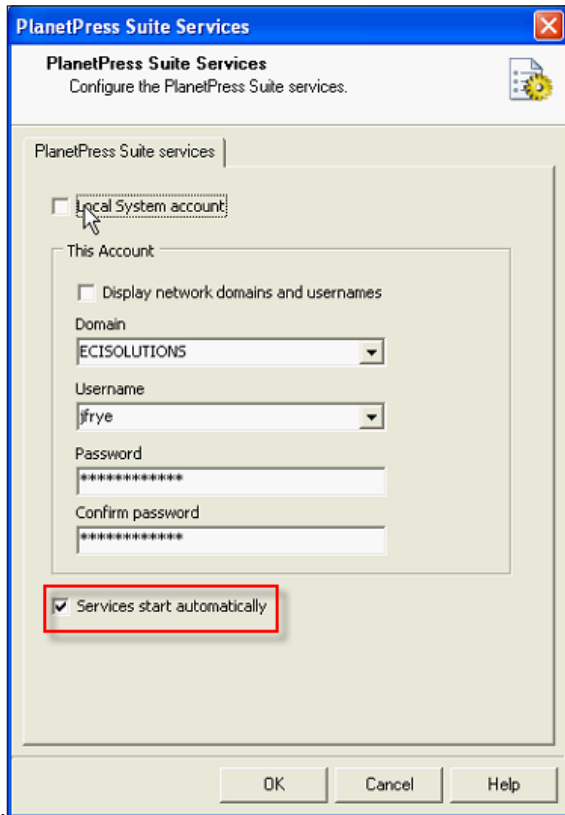
5. Click OK. The text Started displays in the bottom right corner of the dialog box.

   If the service fails to start, the text Stopped and the icon display. To change your information, click the Tools menu and select Configure Services. Re-enter the domain, user name, and password.

Importing PlanetPress DDMS Formats

ECI has created formats specifically for use with PlanetPress. These formats include a pick ticket, invoice, statement, purchase order, and more. They come with preset text conditions for use with PlanetPress. You must import these formats before you can set up your PlanetPress printers or the PlanetPress Office Configuration window.

Contact ECI OP Installations to obtain the formats and for information on where to save them.


Note: PlanetPress services *must* be turned on after installation to allow documents to be sent to the workflow.

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1. From your desktop, double-click . PlanetPress Design opens.

2. Click and scroll to the location on your hard drive where the DDMS formats are stored.

3. Double-click a format to import it. The format you select must end with the .PP7 extension.

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Note: We recommend that you change your logo at this point. See the heading **Changing the Company Logo**.

4. When the format opens, click and select Send To and select PlanetPress Suite Workflow.
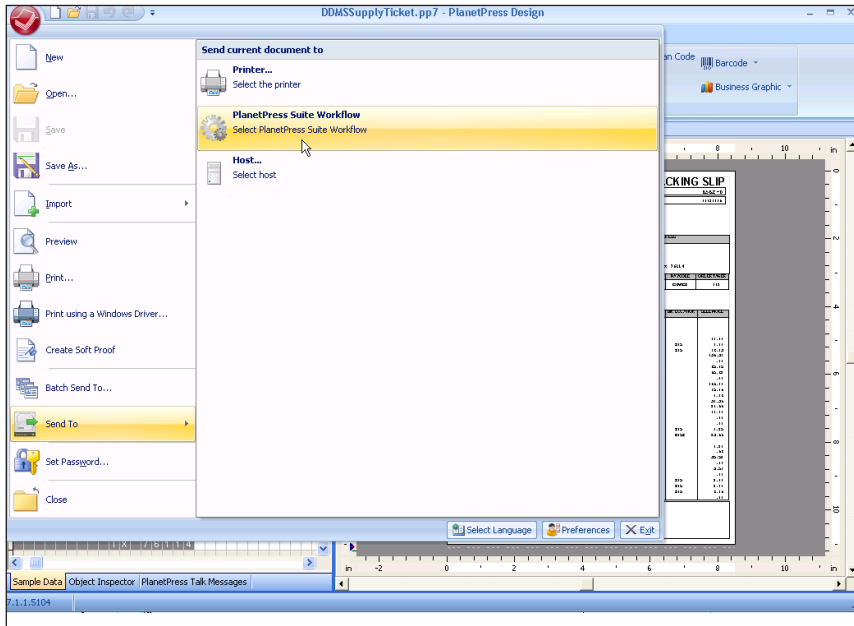
5. In the Send To PlanetPress Suite Workflow dialog box, make sure the LocalHost check box is checked, and click OK.
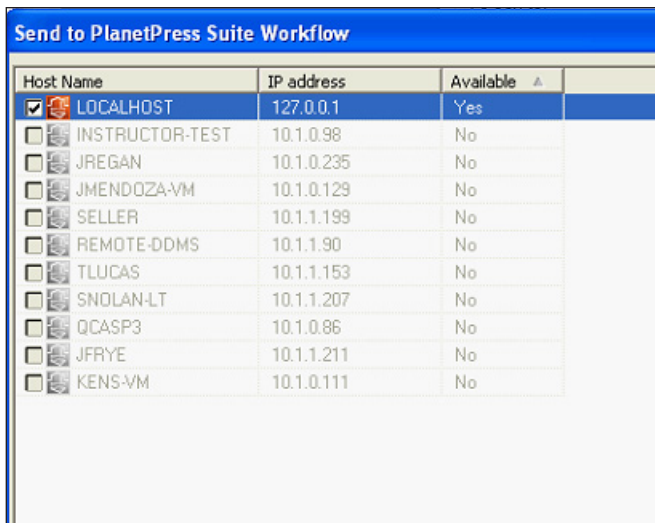
6. Repeat **Steps 2-5** to import each DDMS format until all formats have been imported and sent to the PlanetPress Workflow.

7. When finished, close PlanetPress Designer.

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Adding Printers for Use With PlanetPress

Each DDMS printer you plan to use with PlanetPress must be installed as a separate Virtual Inbound printer. PlanetPress software monitors these Virtual Inbound printers and determines which formats to print, fax email, and/or archive.

Virtual Inbound printers must be installed on the same computer as the PlanetPress software. If you did not install the PlanetPress software on the DDMS server, the Virtual Inbound printers must be shared. They must then be installed on the DDMS server.

Note: These steps may differ between versions of Windows. For example, your printer controls may be called Printers and Faxes.

1. First, create a directory for your port.

    1.1 Click Start and select My Computer.

    1.2 Double-click the Local Disk (C:) drive.

    1.3 Click New Folder and name it Printers.

    1.4 Open the Printers folder and click New Folder. Name this folder after the printer you plan to create. For example, for printer P1, name this folder P1-PP.

2. Click Start and select Devices and Printers. The Devices and Printers window opens.

3. Click Add a Printer. The Add Printer Wizard starts.

4. Click Add a Local Printer. The window automatically moves to the next step.

5. Select the Create a New Port option.

6. Click the down arrow and select Local Port.

7. In the Enter a Port Name dialog box, enter the path to the printer folder you created in **Step 1**. For example, if this is printer P1, you would enter **C:\Printers\P1-PP.txt**.

8. In the Manufacturer section, select the Generic option.

9. In the Printer section, select Generic/Text Only. Click Next.

10. When prompted, enter a unique printer name. You must use the following naming convention: P1-PP, P2-PP, P3-PP, and so on. For every physical printer you use with PlanetPress, you must have a virtual printer for it. The first two characters denote the physical printer, and the -PP suffix indicates that this is a virtual printer. So, P1-PP is the virtual printer for the physical P1 printer.

11. Click Next.

12. Finish adding the printer as you normally would.

13. When prompted, share the printer. Use the same name you set in **Step 10**.

14. Now, add a network printer on the DDMS Server.

    14.1 Add your physical printers to the PlanetPress machine via the IP address.

    14.2 Add virtual printers for each physical printer to the PlanetPress machine, and share them if PlanetPress is not installed on the DDMS server.

14.3   Add these same virtual printers to the DDMS server from their PlanetPress machine via their network.

Note: If the printers are hosted, they are added via the VPN tunnel IP/share name. ECI provides the VPN tunnel IP address.

15. Add the printers in DDMSPLUS Administration. For instructions, refer to the DDMSPLUS Administration handout.

Note: If you are using DDMS, change TBL Config on the DDMS server to reflect the virtual printers (P1-PP, P2-PP, etc.).

# Setting Up the PlanetPress Office Configuration

You must set up two printers in the PlanetPress Office Configuration window: an Input printer and an Output printer. You must set the Input printer to the Virtual Input printer. This printer notifies PlanetPress when a document is ready to be processed. You must also change all output branches to use each physical printer.

1. When the PlanetPress Office Configuration window opens, click [icon], Import, and select Configuration Components. Contact ECI OP Implementations to find out which processes need to be added. See the figure on the following page.
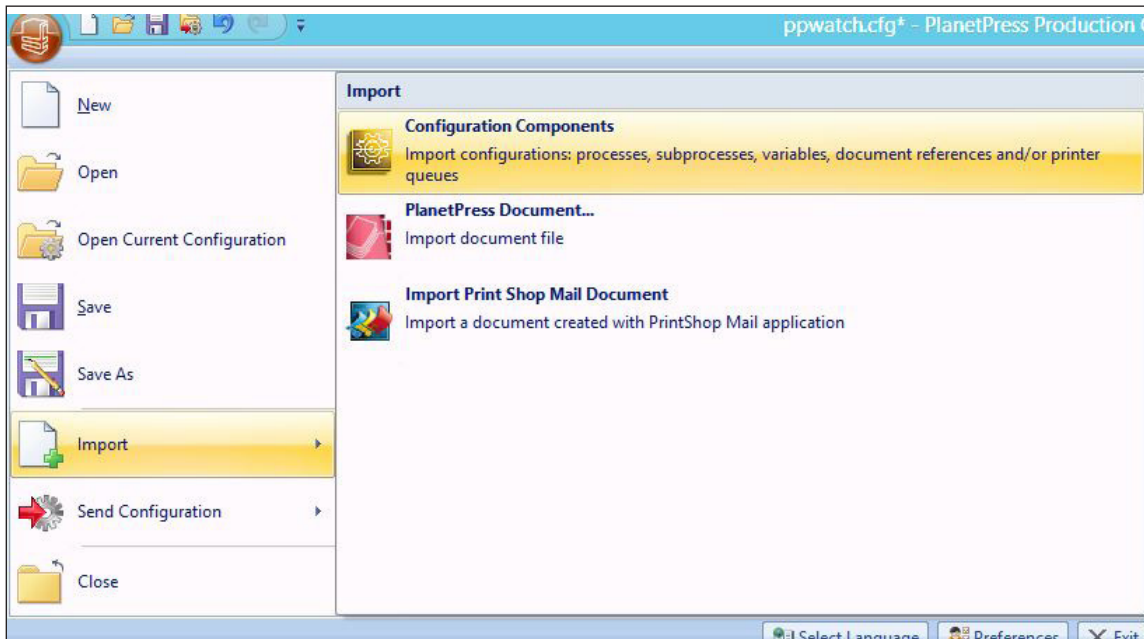
2. Select one of the processes from the Processes menu.
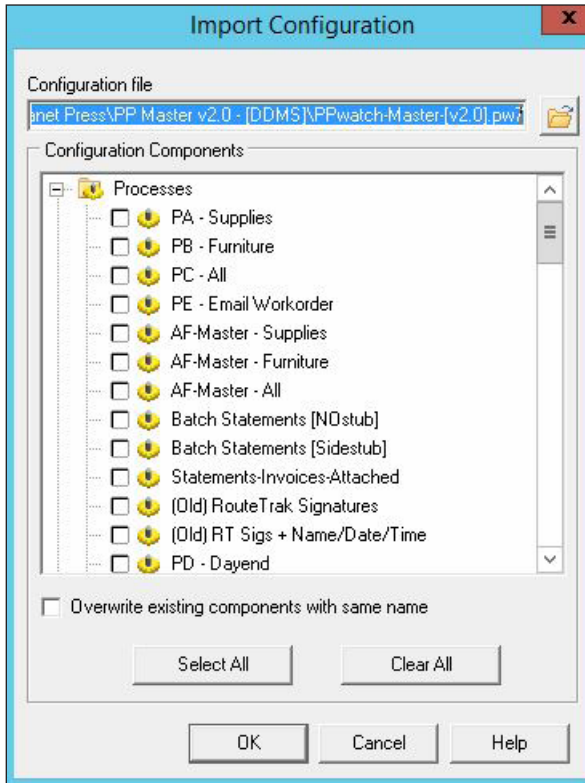
3. Change the Input printer to the Virtual Inbound printer you added. This is the printer that notifies PlanetPress when a document is ready to be processed.

    3.1   Double-click _____. The WinQueue Input Properties dialog box opens.

    3.2   Click the down arrow in the Printer Queue box and select the Virtual Input printer. For example, you could select P1-PP.

    3.3   Click OK.

    3.4   At the Confirm message, click Yes. The icon's text changes to the printer you specified.

4. Update the Output printer for each format shown to the actual physical printer you added.
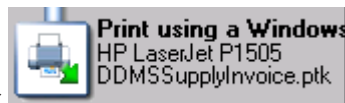
    4.1   Double-click _____. The Print Using a Windows Driver Properties dialog box opens.

    4.2   Click the down arrow in the Printer Queue box and select the physical printer to which you are printing.

5. Repeat the above steps for each format until all are set to the test printer. This is the printer to which the document actually prints.

6. When all printers have been changed, click [icon]. You can also click [icon] and select Send Configuration.

Note: Once your printing processes are finished, you must send the configuration to the workflow in order to make it active.

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7. At the You Are About the Overwrite Your Configuration warning message, click Yes. If you click No, your changes are not saved. This completes the setup procedure.

   You can now print test formats, and you should now be able to print PlanetPress formats.

Note: If you plan to email or fax formats with PlanetPress and you currently use AutoComm II, you must set up the PlanetPress formats before you can begin using PlanetPress.

Copying Default Settings

Once you configure a working printing process, you can use it as a template for each printer you plan to use with PlanetPress. Doing so saves you both time and errors, because you do not have to recreate each format's text conditions.

1. On the left side of the window under Processes, right-click the process to copy, and select Copy.

2. Right-click Processes again, and select Paste. Process1 is added to the Process list.

3. To rename this process, right-click it and select Rename.

4. Enter the new name over the existing name and press Enter.

5. Double-click [WinQueue Input P3-PP icon] and select the Input printer in the Printer Queue box.

6. Double-click [Print using a Windows HP LaserJet P1505 DDMSSupplyInvoice.ptk icon] and select the Output printer for each format shown.

7. After you change all of the Output printers to the actual printer, click [icon] to send the configuration.

8. At the You Are About to Overwrite Your Configuration warning message, click Yes.

Note: Your changes are not saved until you send the new configuration.

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9. Repeat these steps for each printer you plan to use with PlanetPress.

Using the PlanetPress Office Configuration Tasks

There are many tasks available in the PlanetPress Office Configuration window. You can access these tasks through the Plug-In bar. Tasks are organized by category. The categories list plug-ins for each task that can be performed. Tasks in the top section of the Plug-In bar change as you select categories at the bottom.

[icon] **Outputs:**   Displays the Output tasks.

[icon] **Metadata Related:**   Displays all Metadata Related tasks.

Connectors: Displays the Connector tasks.

Process Logic: Displays all Process Logic tasks.

Data Splitters: Displays the Data Splitter tasks.

Actions: Displays the Action tasks.

Inputs: Displays the Input tasks.

Note: You may use some of these tasks more often than others.

Outputs

Windows Print Driver: The windows Output Printer Queue sends print jobs to local or network printer queues set up in the Windows session in which the PlanetPress Suite Workflow Tools are running. The corresponding Windows print driver is used in the printing process.

Connectors

PlanetPress Image: Output tasks make requests to PlanetPress Image, creating image files, such as PDFs, which are then archived or emailed.

Process Logic
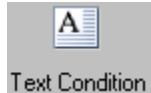
Text Condition: Text conditions test the presence of a string within the job file. You can, for example, search for the string Gold Member on the first line of the job file. As another example, you could search for a variable string retrieved via a job info variable or a data selection in a given location in the job file.

Different things happen when data travelling down a process comes to a branch or condition:

- When data travelling through a process comes to a branch, it is duplicated so identical copies of the data can continue down both branches.

- When data travelling down a process comes to a conditional crossing, it is either sent down the True or the False branch, based on the result of the condition.
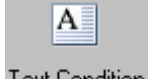
Inputs

WinQueue Input: Input tasks capture print jobs sent to a Windows printer queue. These jobs can come from a local user or from a remote user. The WinQueue Input task can be used to create a new Process.

Adding Text Conditions

1. In the Plug-In bar, click ◇.

2. Click [A] Text Condition and drag the icon to the location on the WinQueue Input's branch where the condition should be added. For example, you could drag it under Invoice or Purchase Order.

3. In the Text Condition Properties dialog box, click the String box.

   • To test the presence of a given string at a location, enter the string. This is case-sensitive.

   • To compare two strings, enter the first string in this box. This is case-sensitive.

   You can enter a static string, a variable, or a data selection in the String box. If you enter a variable, PlanetPress Workflow retrieves the string from the variable before performing the comparison. If you enter a data selection, PlanetPress Workflow searches the job file and retrieves the string found at the referenced location before performing the comparison. For more information, consult your PlanetPress online documentation.

4. You must also click the Line and Column boxes to enter the information where the data appears.

   Alternatively, you can also click the data selection box to open a text file and highlight the exact positions.
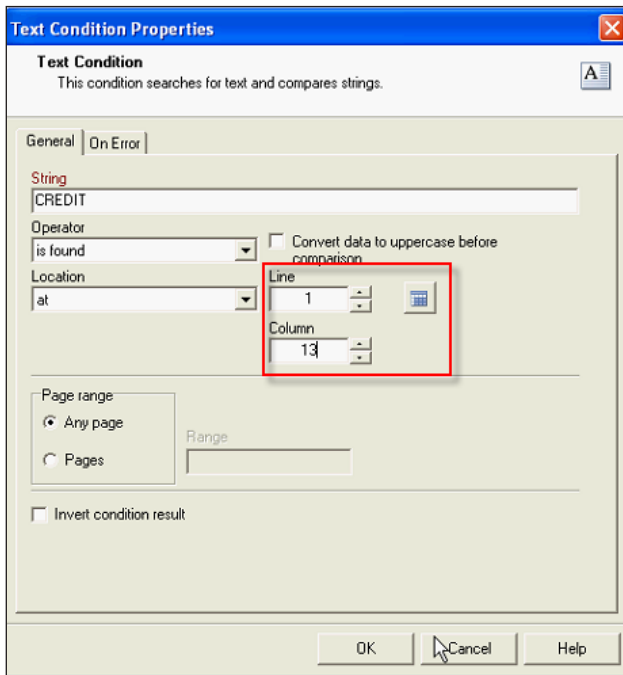
5. Click OK. The text condition is added, and the Output is set to Unknown.

6. In the bottom right corner of the window above the text Started, click 📥 to select Outputs.

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7.   Click and drag the icon to the text Unknown.

8.   In the Print Using a Windows Driver Properties dialog box, click the down arrow in the Printer Queue box and select the printer. Click OK.

9.   When you are finished, click . You can also click and select Send Configuration.

10. At the You Are About to Overwrite Your Configuration warning message, click Yes. If you click No, your changes are not saved.

Using the Day-End Process

In addition to Default Processes, DDMS also provides a Dayend Process. Instead of sending this information to an actual printer, the Dayend process lets you save dayend reports as PDFs in a folder on your network.

1.   On the left side of the window under Processes, click Dayend.

2.   Double-click .

3.   Click the down arrow in the Printer Queue box and set the printer to a dedicated Virtual Inbound printer.

4.   To print to a file or image, double-click . The PlanetPress Image Properties window opens.

5.   In the Documents section, click the DDMS PDF Storage option.

6.   In the Run Mode section, click the Optimized Postscript Stream option, if it is not already marked.

7.   Click the down arrow in the Output Type box and select PDF File.

8.   Check the Archive Output box if it is not already checked.

9.   In the Index section, click the None option.

10. Right-click the Archive Folder and Filename boxes to select different variables, as needed.
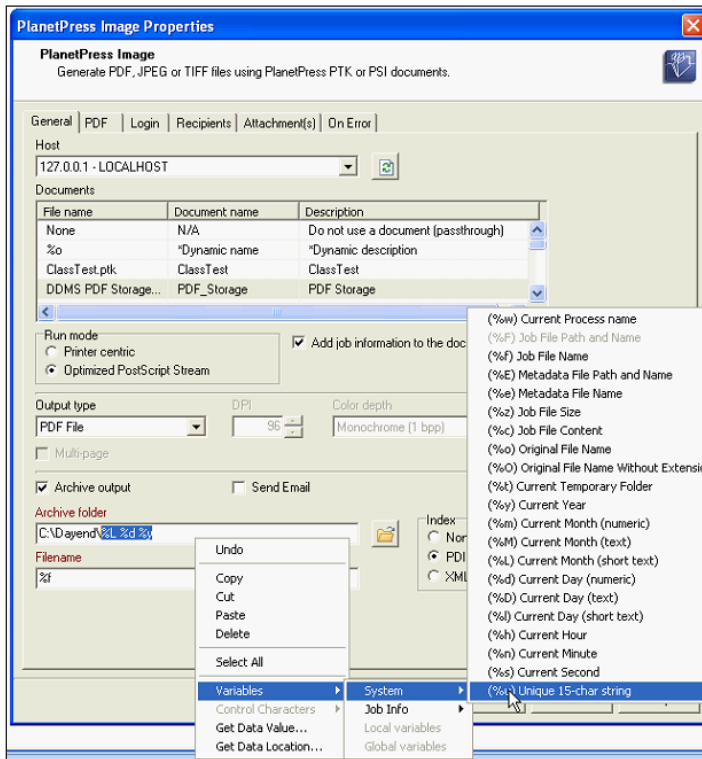
11. When you are finished, click OK.

Using PlanetPress Design

PlanetPress Design offers many powerful options that let you be creative when setting up your company formats. This document includes a few steps you need to get started, such as: changing the company logo, changing your address information, and more. Remember, any changes you make do not take effect until they are sent to the PlanetPress Worfklow.

Note: This document provides only a brief introduction to the options available in PlanetPress Design. For more information about the options available to you, consult your PlanetPress online documentation.

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1. From your desktop, double-click . PlanetPress Design 7 opens.

2. Click and browse to the DDMS format on your hard drive. DDMS formats end with the .PP7.

Note: You can also click Start from your desktop, select My Computer, and navigate to the folder that contains your .PP7 formats. Double-click the format to open it.

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3. Double-click the file to open it.

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4. The format opens in the PlanetPress Design window. This window is divided into three sections:

   • Document Structure

   • Sample Data

   • Document Workspace

   Use the following instructions to make minor changes. For more detailed information, see your PlanetPress online documentation.

Changing the Company Logo

1. To change the ECI logo to your company's logo, double-click the picture object. The Picture dialog box opens.

2. Click and browse to your company logo on your hard drive. See the image below.
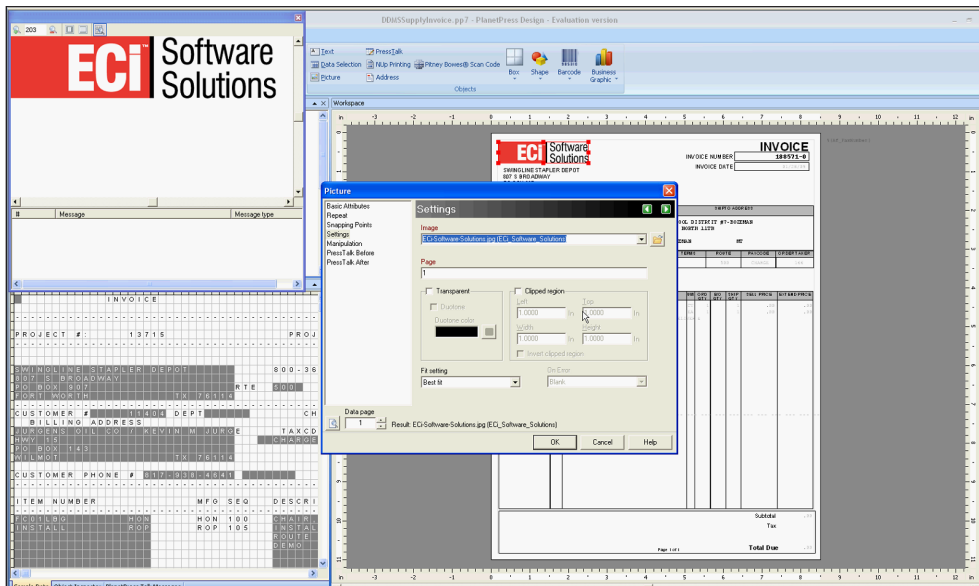
3. Click OK. The logo is replaced. Resize or reposition your logo, as needed.

4. When you are finished making changes, click , Send To, and select PlanetPress Workflow.

Note: ECI recommends you use logos that are 500KB or less. The larger the file size, the longer it takes the format to print.

Creating PlanetPress Formats Using DDMS Text Files

You can print information to a .TXT file using PlanetPress. When you do, you specify how the information should print. If you do not specify this information, PlanetPress prints the data using a blank overlay format instead. This is useful when you need to create custom formats that are not included in the standard DDMS format package.

1. On the left side of the page under Document Structure, click Page, and right-click Page 1.

2. Highlight Add and click Add New Data. The Data Selector dialog box opens.

3. Click ![folder icon] and browse to your text file.

4. Select the file and open it. The information from the file appears in the Sample Data section of the window.

5. You can now move pieces of data to the document.

    5.1   In the Sample Data section, highlight the text to be moved. Be careful to highlight the entire piece of data. For example, if you drag and move only 10 characters, but the field can hold up to 20, only 10 characters print on the format.

    5.2   Next, click and drag the text to the body of the document.

    5.3   Click Insert Data Selection. The text is added to the document.

    5.4   Continue highlighting and dragging text until all pieces of data have been moved.
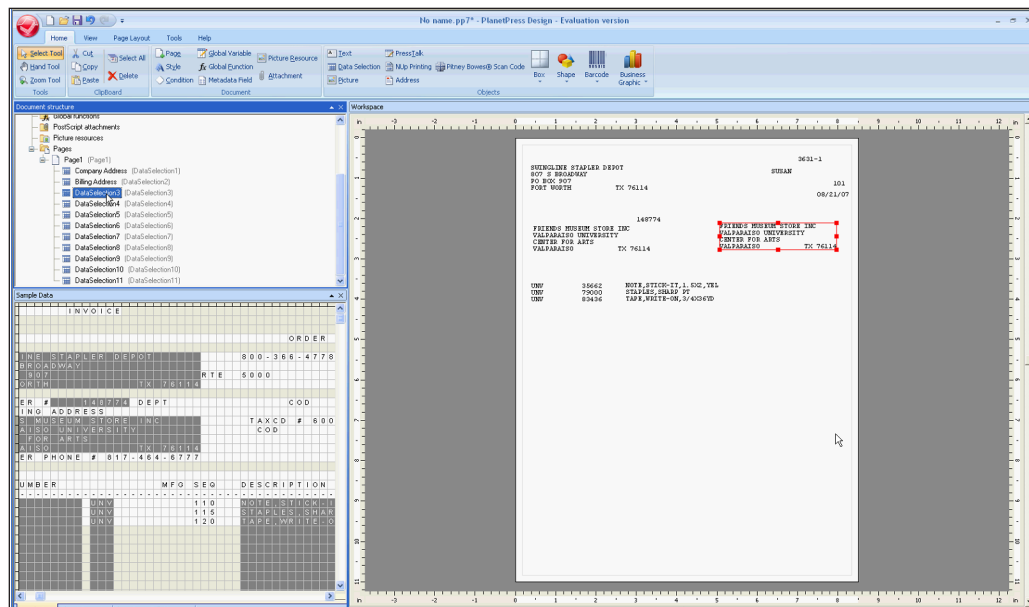
6. As you drag and drop pieces of information, PlanetPress assigns a generic description to the data. This description is added to the Pages folder under the Document Structure section. We recommend you click the generic name and enter a more useful description, such as Company: Address, Salesperson, Item Number, Route, and so on.

    6.1   Click the generic name and enter new text over the existing text.

    6.2   Press Enter. The name is updated.

7. You can also add text to boxes, such as: Ship To, Bill To, and so on. When you do, the box and its text move as a single object.

    7.1   Click the Home tab.

    7.2   Click the down arrow next to Box and select four (4) sides.

    7.3   Draw the box on the document.

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7.4   Double-click inside the empty box to open the Box dialog box.

7.5   In Borders, select the line color, width, and style for the text box outline.

7.6   To change the color inside the box, click the Color option.

7.7   Click Fill and choose a different color. For example, you could choose yellow.

7.8   Click Text and enter the text to print inside the box.

7.9   Bold the text or change its font and size.

7.10   When you are finished, click OK.

8.   You can align different text objects on the page.

    8.1   Click the first object to align on the document. PlanetPress uses the properties of the first object you select to set properties for other objects.

    8.2   Hold the Ctrl key and click each object to align.

    8.3   Right-click and select Align. The Alignment dialog box opens, as shown below.
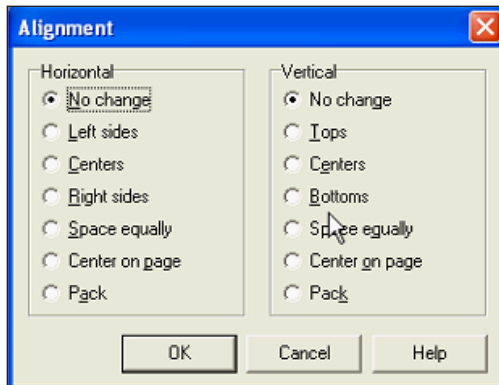
    8.4   Choose the needed settings.

    8.5   Click OK when you are finished.

9.   With Object Inspector, you can also re-size the data so it appears on the same vertical and horizontal sections of the page.

    9.1   In the Sample Data section, click the Object Inspector tab.

    9.2   Click the first object to resize. PlanetPress uses the height and width properties of the first object you select when you set the other object's properties.

    9.3   Hold the Ctrl key and click each object.

    9.4   Scroll down to Position and Size in the Object Inspector.

    9.5   Click the Height box and press Enter.

    9.6   To resize by width, click the Width box and press Enter.

10. PlanetPress text uses Courier Monospace font by default, but you can always change it if needed. If you do, be careful when you print Furniture formats. These formats contain data that requires monospacing.

    10.1   Under Document Structure, right-click Styles, click Add, and select Style. The Style Properties dialog box opens.
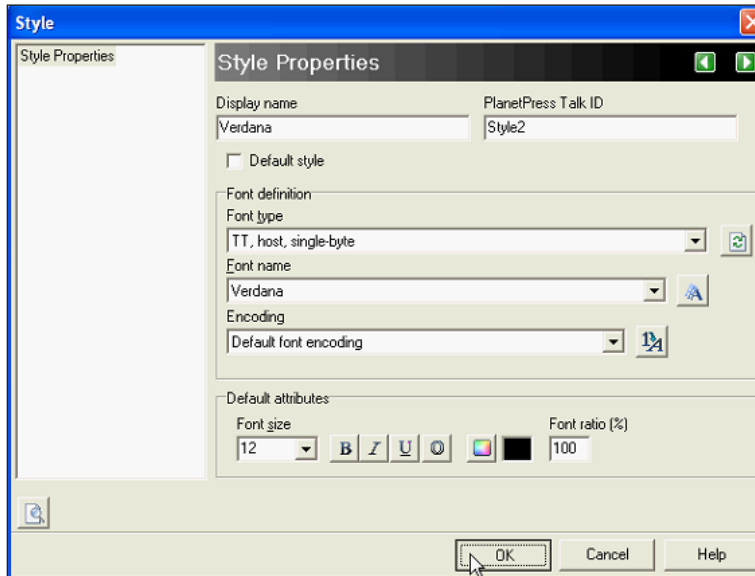
    10.2   In the Display Name box, enter a display name for the font you are setting up. For example, enter Verdana if you are setting up the Verdana font.

    10.3   Click the down arrow in the Font Type box and select TT, Host, Single-Byte. Choosing this option displays all of the fonts stored on the host computer.

    10.4   Click the down arrow in the Font Name box and select the True Type font to use. For example, select Verdana.

    10.5   Click the down arrow in the Font Size box and select the font size to use.

    10.6   You can also select bold, italics, underline, and color.

    10.7   When you are finished, click OK. The style is added to the list.

    10.8   To assign the style to text on the document, click the text object on the document.

    10.9   Click Basic Attributes in the Text dialog box.

    10.10 Click the down arrow in the Style box and select the style to assign to this text. See the figure on the following page.
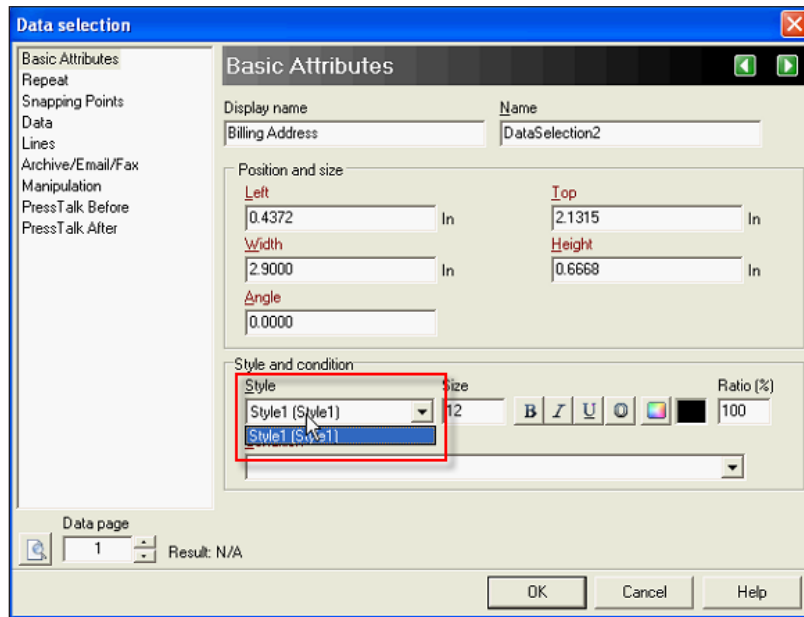
11. When you finish working on your document, click , Send To, and select PlanetPress Workflow. Your changes are not saved until you send them to the workflow.

Setting Up the (L6T) Screen

PlanetPress can fax and email documents to your customers. The system uses SMTP to email documents and the Microsoft® Windows Fax program to fax documents. Since PlanetPress replaces Autocomm II, we recommend that the email and fax forms you currently use are properly designed and print without errors before you set up the AF-MASTER Process.

1. Open the text-based (L6T) Fax Parameters screen.

2. Tab to the Phone Line field and type **DY**.

3. Tab to the Logon ID field and type **AUTOCOMM**.

4. Tab to the Network field and type **A**.

5. In the Statements field, type **PPSTMT** or **PPSTUB**.

Note: ECI recommends that you write down the format you enter in the Statements field for future reference.

6. In the Invoice field, type **7I**.

7. In the Pick Ticket field, type **7T**.

8. In the P/O field, type **PO-PP**.
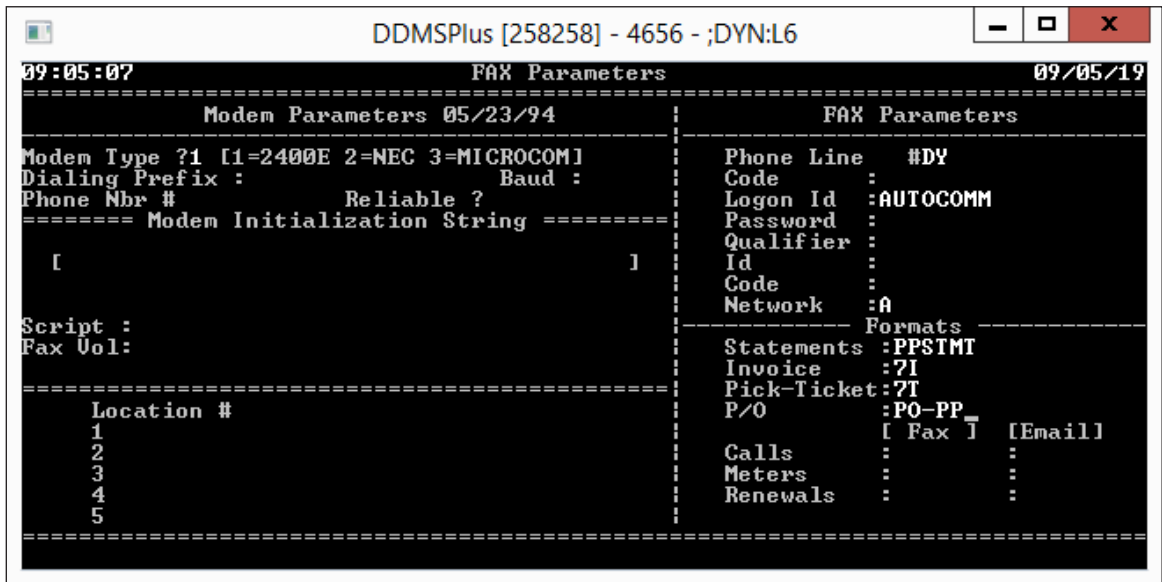
9. When you are finished, press Enter.

Setting Up the AF-MASTER Process (Email/Fax)

If you are currently using Autocomm II, you must disable the service before setting up the PlanetPress process for faxing.

To set up the AF-MASTER process:

1. Install the modem on the PlanetPress server, if applicable.

2. Install Microsoft Fax, if applicable.

3. Create the ODBC connection to the AF-MASTER.dbf file on your DDMS work unit.

4. Set the AF-MASTER process in PlanetPress Configuration to point to the new ODBC connection.

5. Set up the AF-MASTER process conditions for the documents to be emailed and/or faxed.

Creating the ODBC Connection

Note: If it does not exist, locate the VFPODBC.MSI file in your PP Master v2.0 [DDMS] folder.

1. From your Windows desktop, click Start and select Control Panel. The Control Panel opens.

2. Click System and Security.

3. Click Administrative Tools. The Administrative Tools window opens.

4. Double-click Data Sources (ODBC). The ODBC Data Source Administrator opens and displays the User DSN tab by default.

Notes: PlanetPress cannot access mapped drives. You must use a UNC path instead of mapping a drive to the DDMS work unit. For 64-bit systems, click Start and select Run. Type **odbcad32.exe** and press Enter.

5. Click the System DSN tab.
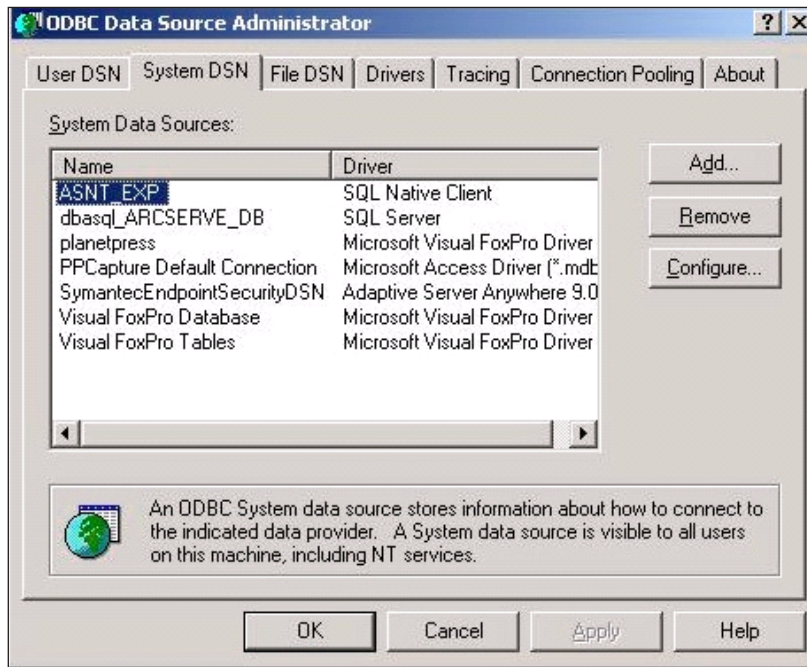
6.   Click Add. The Create New Data Source window opens.

7.   Scroll down and select the Microsoft Visual FoxPro Driver option.

8.   Specify the driver settings in the ODBC Visual FoxPro Setup dialog box.

 8.1   Click the Data Source Name box and type **PlanetPress**.

 8.2   Click the Description box and type **planet press**.

 8.3   In the Database Type section, click the Free Table Directory option.

 8.4   Click the Path box and enter the UNC path where the DDMS work unit folder is stored. This is the volume listed in the text-based (L0) Global Master Parameters screen. The default volume is W1.

   Example: \\ddms-server\w1.
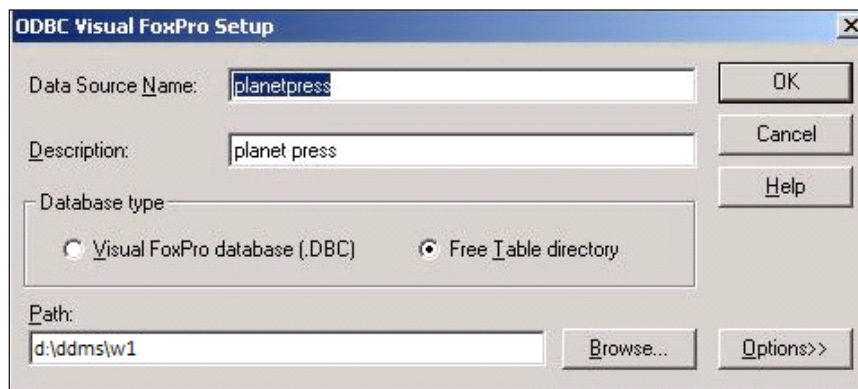
 Note: You can also click Browse to locate the UNC path.

continue to next page

8.5   Click OK.

9. Click OK to exit the ODBC Data Source Administrator window.

Setting Up the AF-MASTER Process in PlanetPress

1. From your desktop, double-click . PlanetPress Configuration opens.

2. Click AF-Master in the Configuration Components window. If AF-Master is not shown, click the plus sign next to Processes.

3. Double-click to open the PlanetPress Database object. You *must* perform these steps for each PlanetPress Database object. For example, if you have four PlanetPress Database objects, you must perform these steps four times. If the system displays a data error message, click OK.

4. In the PlanetPress Database Properties dialog box, click the Dynamic SQL tab.
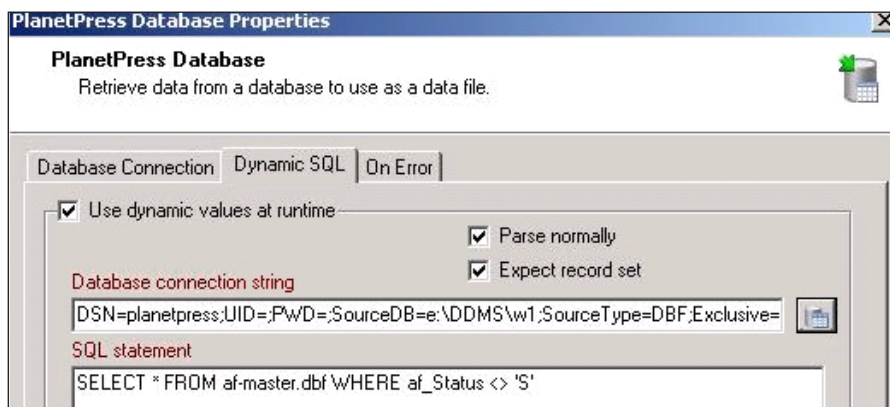

5. Click to browse.

    5.1   In the Select Data Source dialog box, click the Machine Data Source tab, shown below.
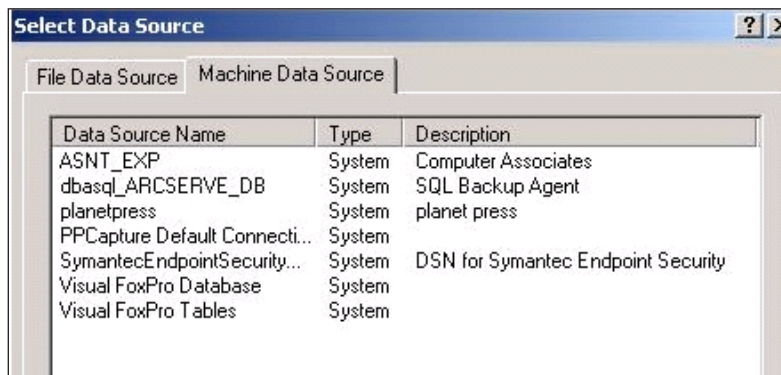
    5.2   Click Cancel to clear the Database Connection String box, and then click Browse again.

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5.3   Select the AF-MASTER process on the left, then, in the configuration window, scroll down and right until the first text condition displays. For example, scroll until INVOICE, 9F* displays.

5.4   Click the **PlanetPress** connection you added earlier.

5.5   Click OK. The Configure Connection dialog box opens and displays the path in the Path box, as shown below.
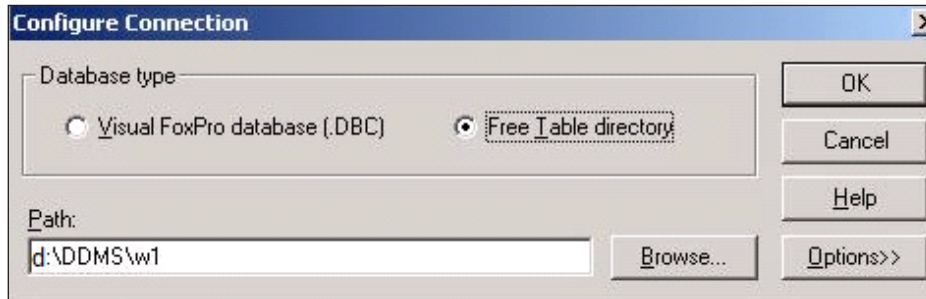
5.6   Type the UNC path, or the local path, that you entered in **Step 5.4** under the **Creating the ODBC Connection** heading.

5.7   In the PlanetPress Database Properties dialog box, click OK to exit.

5.8   Repeat **Steps 2-5** for every PlanetPress Database plug-in.

Setting Up AF-MASTER Text Conditions

The conditions for invoices, purchase orders, and statements have already been set up. These conditions are the same ones set up in your printer processes. However, you must set up AF-MASTER text conditions, because the AF-MASTER process uses the Image Connector as the output for sending emails. The Image Connector must be modified to set your SMTP Address, From Address, Reply Address, and Custom Subject/ Messages. You must change the Output for each document.

Note: PlanetPress does not natively support sending SMTP email that requires SSL and/or TLS commands. This includes Office365™ and others. The email provider must allow sending SMTP mail out of a non-SSL/TLS port. Typically, this is Port 25, but others can work. If you are unable to use a non-SSL/ TLS port, contact ECI Sales for a custom process to work with your SMTP email server configuration.

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1.   From the PlanetPress Configuration window, double click (the output for the invoice). The PlanetPress Image Properties dialog box opens and displays the General tab by default.

2.   Specify the appropriate settings. The Filename box should display the data selection for the invoice number. This is not the .PDF name that is attached to the email.

3.   Check the Send Email box.

4.   Click the Login tab and check the Use SMTP Email box, if it is not already checked.

5.   Enter the appropriate name, organization, from email address, and reply address information. The From Address can differ depending on the document you are sending. For example, you could show:

    •   Accounting@eci2.com when emailing invoices.

    •   Purchasing@eci2.com when emailing purchase orders.

- Customerservice@eci2.com when emailing quotes.

6. Next, click the Recipients tab, shown below. The default DDMS variables display. Do not change the To address. You can, however, override the Subject and Message portions.

For example, you could add We Appreciate Your Business to the Email Subject box. You could also add contact information to the Message box. If you choose to leave them as they are, the information defaults to the standard Subject and Message. The standard subjects are below:

- **Invoices:** In Reference to Your Order #XXXX.

- **Statements:** In Reference to Your Statement.

- **P/Os:** In Reference to Your P/O #XXXX.

See the following figure.
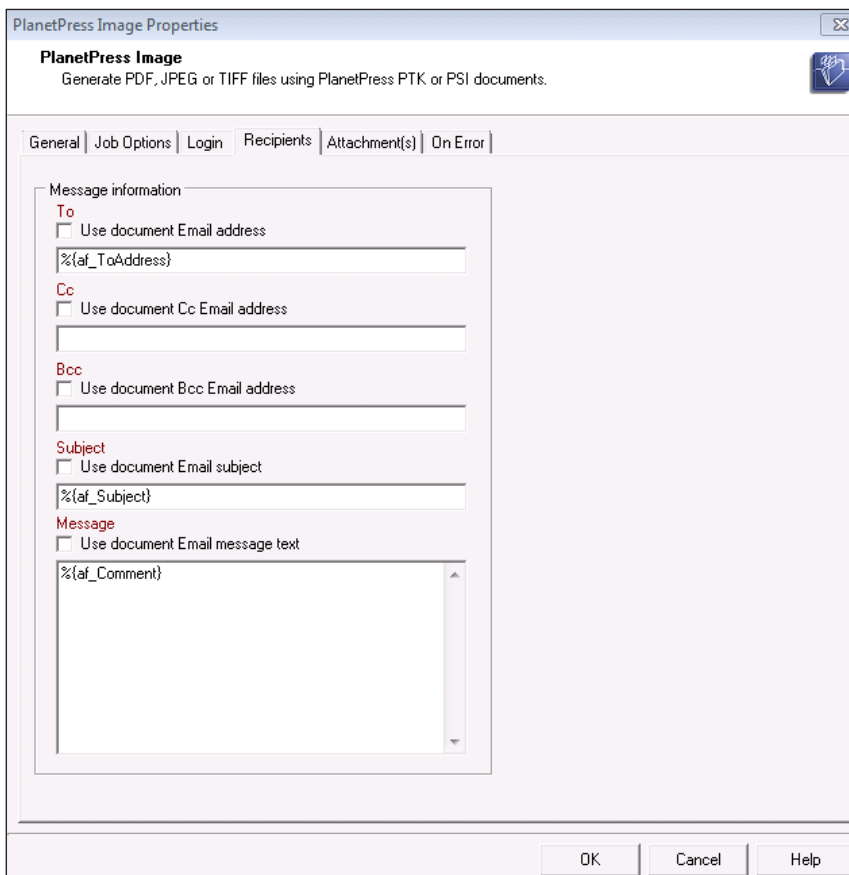
7. Click the Attachments tab. Make sure the Attach Output File box is checked.

8. Click OK to close the PlanetPress Image Properties dialog box.

Faxing and Emailing Batch Statements in PlanetPress

DDMS does not have a function for statements like the [M] Send Invoices Electronically function in the text-based (TR) Order Entry Report screen. Instead, statement batches print. This emails/faxes invoices in a batch to a PlanetPress printer. PlanetPress then identifies a code from each customer to determine if it should email, fax, or print the statement. The batch statement process may already be included in your default DDMS configuration file (.PW7). If so, change the input printer, the SMTP settings in image output, and the physical printer. If the batch process statements are not included in your default DDMS configuration file, contact ECI OP Installations, or follow the steps below to create new ones.

Note: Statements use the email address and fax number entered in the Customer Master tab.

To batch fax or email statements, you must:
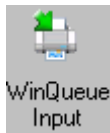
- Identify those customers who prefer to receive faxes, who prefer to receive emails, or who prefer to have a printed copy mailed to them.

- Set up a new PlanetPress virtual printer for batch statements. For more information, see the heading **Adding Printers for PlanetPress**.

- Set up a new process in the PlanetPress Configuration window.

To set up a new process:

1. Open PlanetPress Configuration.

2. Right-click Processes in the Configuration Components section, select Insert, and then click Insert Process. This adds Process 1 to the list of processes.

    2.1 Right-click this process and select Rename to rename the process.

    2.2 Enter a new name for this process. For example, you could rename it PS_Statements.

    2.3 Press Enter when finished.

3. Next, click from the Plug-in Bar.
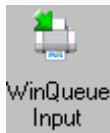
4. Click and drag the icon to the top plug-in: Folder Capture. The WinQueue Import Properties dialog box opens and displays the General tab by default.

5. Set the properties for this printer.

    5.1 Select the virtual printer that is set up for statements. For example, select PS-PP.

    5.2 Click OK when you are prompted to reset the printer spooler and pause the printer.

6. Now, add the Emulated Data Splitter.

Note: This feature opens the statement batch and splits the job into individual statements to determine if they are faxed, emailed, or printed individually. If the splitter is not used, PlanetPress treats the batch as one print job, and the first customer receives all of the statements.

    6.1 Under the Plug-In bar, click (Data Splitters).

6.2 Click Emulated Data Splitter and drag the icon to the branch between Input and the Send To Folder. The emulated Data Splitter Properties dialog box displays.

6.3 Click the Split Data File on a Word option.

6.4 Select Word Change.

6.5 At this point, you can manually enter the information in the From line and From/To column. If you do not have this information, use the Get button to browse for the location of the data on which to split. You can highlight the full account number field, if needed.

- If you are using PPSTMT (DDMSStatement_NoStub), the From line is 12, the From column is 43, and the To column is 53.

- If you are using PPSTUB, the From line is 9, the From column is 41, and the To column is 51.

- If you are not using either of these statements, you must print a sample statement to your text-file printer and browse to open the sample. Then, highlight the entire account number as shown below.
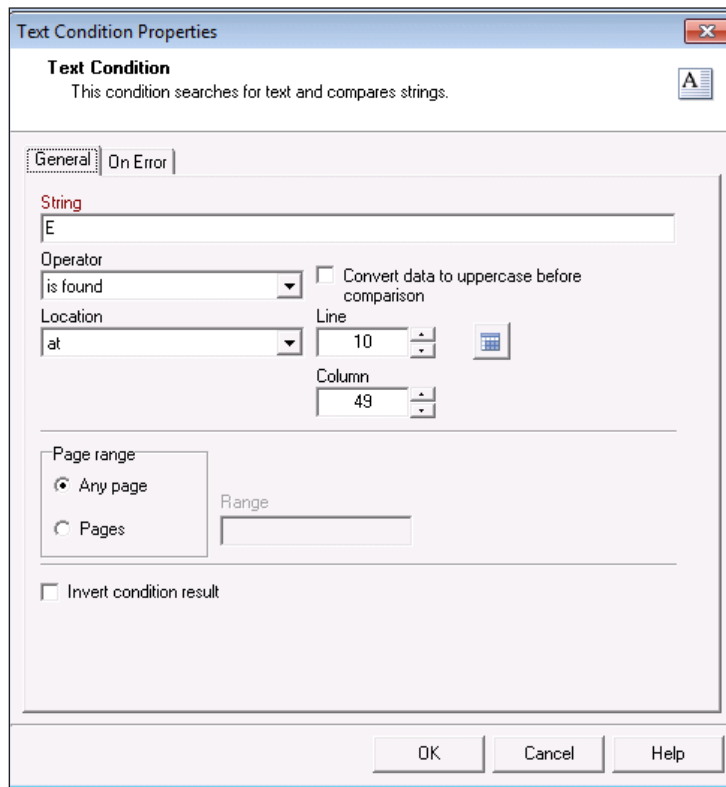
6.6 Click OK when finished.
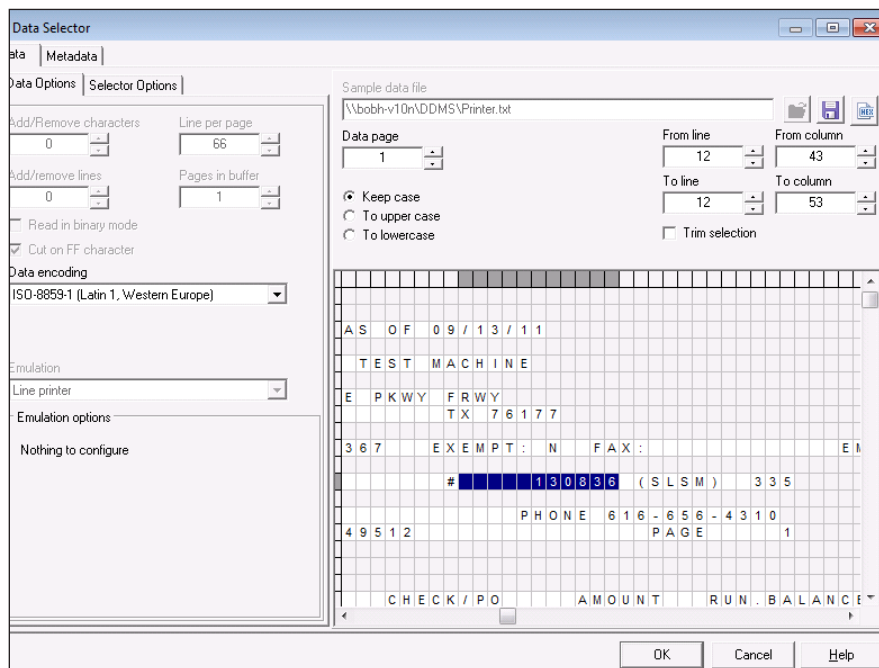
7. Add a text condition that looks for the STMT exempt field.

Note: ECI recommends you use the Statement Exempt field. Type **E** if customers prefer email, **F** if they prefer fax, or leave it blank if they prefer to have a hard copy mailed. Type **Y** if they do not need a statement. If you enter **Y**, DDMS does not output a statement when the batch is printed.

7.1 Click (Process Logic) from the Plug-in bar.

7.2   Click Text Condition and drag the icon to the branch under Emulated Data Splitter. The Text Condition Properties dialog box opens. The first condition looks for an E in the STMT exempt field.

7.3   Type **E** in the String box, as shown in the figure on the following page.

7.4   Enter the line and column numbers of the location of the data.

- If you are using the PPSTMT, the E is on line 10, column 49.

- If you are using the PPSTUB, the E is on line 12, column 89.

- For any other statement type, click to open the Data Selector window, and highlight the location of the data.

7.5   Click OK when finished.

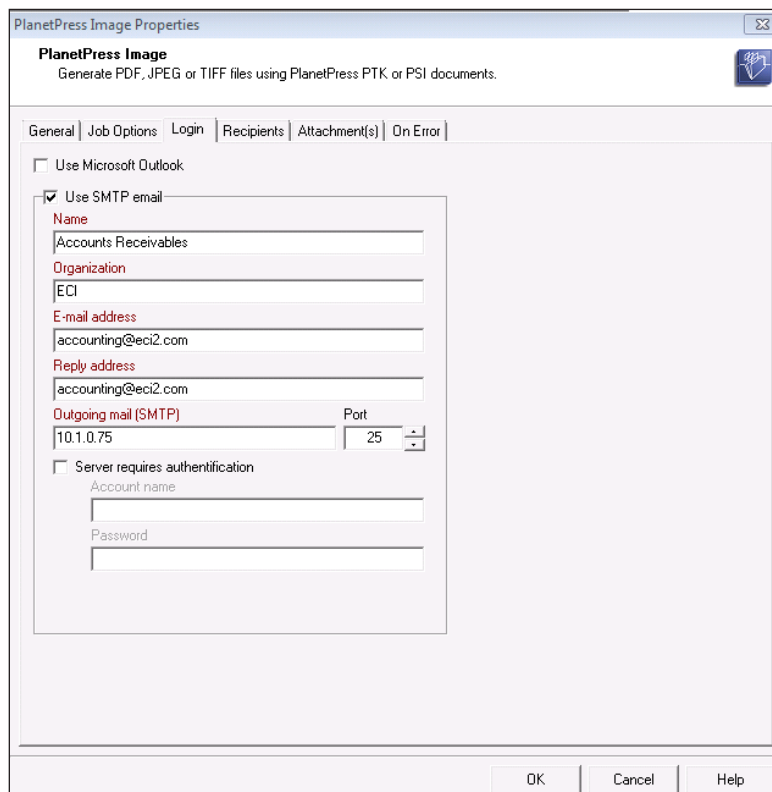7.6   Repeat **Steps 7.1-7.5** to add a text condition that looks for F in the STMT exempt field.

8.   Click (Connectors) in the plug-in bar and choose .

8.1   Click and drag the icon to the Unknown Output box under the E text condition. The PlanetPress Image Properties dialog box opens.

8.2 In the General tab under the Documents section, choose the Format/Overlay for your document.

8.3 Clear the Archive Output box.

8.4 Check the Send Email box.

8.5 Clear the information in the Filename box, and enter a name for the PDF attachment.

Note: You can right-click a field from which to use the data or PlanetPress variables as part of your file name.

8.6 In the Login tab, click the Use SMTP email option.

8.7 Enter your Name, Organization, and From Email Address, as well as the Reply Address and your SMTP information.

Note: The SMTP information can be the IP address or name of your exchange computer.

8.8 In the Recipients tab, select the Use Document Email Address option.

8.9 Right-click the To box and select Get Data Location. The Data Selector window opens.

8.10 From here, you can manually enter the line and column numbers, or you can locate and highlight the email address in the grid.

- The PPSTMT email and address are on line 10, columns 76-120. This means that the information in the To box reads @(1, 10, 10, 76, 120, KeepCase NoTrim). You can remove the word No from the data location to trim the extra spaces around the email address.

8.11   Click OK when you have located the data. The To box populates.

8.12   Enter a subject in the Subject box. For example, you could enter Monthly Statement from ECI Solutions.

8.13   Enter any message to be part of the email body in the Message box. You can also right-click this box to locate the data and highlight the needed information.

8.14   Select Attach Output File in the Attachments tab.

8.15   Click OK.

9.   Click (Connectors) in the Plug-In Bar and select .

    9.1   Click and drag the icon to the Unknown Output box under the F text condition. The PlanetPress Fax Properties dialog box opens.

    9.2   In the Documents section, choose the appropriate overlay for statements, then click OK.

10.   Click (Outputs) in the Plug-In bar, and select (Print Using a Windows Driver).

    10.1   Click and drag the icon to the final output — the Send To Folder. The Print using a Windows Driver Properties dialog box opens.

    10.2   From the Printer Queue drop-down menu, select the printer with which to print the statement.

11.   Click (Metadata Related) in the Plug-In Bar and select (Create Metadata).

    11.1   Click and drag the icon under the E text condition branch. The Create Metadata Properties dialog box opens.

    11.2   Select the statement overlay and click OK.

    11.3   Repeat **Steps 11.1-11.2** for the F text condition and the Using a Windows Driver branches. See the figure on the following page.