Create!form® for Microsoft Dynamics™ AX

Design and Deliver Custom Documents from Microsoft Dynamics AX Output

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

Create!form Designer for Advanced Document Composition

Create!form lets you quickly and easily customize document output from Microsoft Dynamics AX using a WYSIWYG "drag and drop" user interface. As part of the Create!form suite, Create!form Designer enables users to create custom invoices, checks, purchase orders and other documents, without programming or application changes.
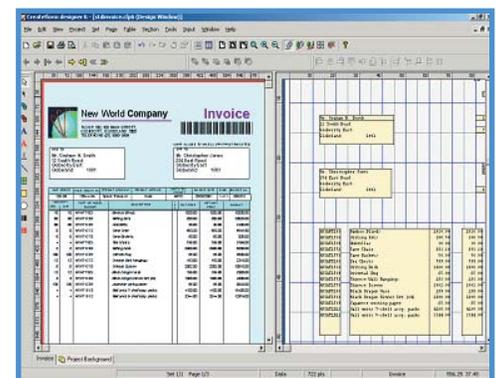
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With Create!fom Designer, you can add logos, graphics, bar codes, signatures, colors, fonts and conditional logic to your forms. The intuitive graphical design interface allows nearly anyone in your organization, even non-IT staff, to design forms giving control to those who understand the document best.

To define a data map, simply select the data you want mapped from your original output, and drag it to the desired location in your new design. Customize font, size, color, shading, orientation/rotation, justification and more. Create!form Designer lets you 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.

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

Create!form Designer's easy-to-use graphical interface lets users assign variables and customize output in a single step.

Benefits of Create!form:

- Compose more professional-looking business documents, including invoices, MICR checks and purchase orders

- Dynamically tailor logos, languages, and marketing messages by recipient

- Enable international business transactions with documents supporting double-byte characters

- Reduce postage costs by migrating to electronic delivery channels

- Eliminate the need for costly pre-printed forms and custom check stock

- Automatically "repaginate" output to conserve printed paper and reduce PDF file sizes

Bottomline
Technologies®

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

Bar Code Insertion - As a standard feature, users can implement static and dynamic bar codes in purchase orders, inventory pick slips and other documents. Choose from a variety of bar code standards such as Code 39, UPC, EAN, Code 2 of 5 and 128, along with two-dimensional bar codes, including PDF 417 and MaxiCode. Bar codes 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 Logic - Specify user, data and lookup variables to be conditionally displayed in the source file during both design and runtime operation. Variable sub-forms can also employ conditional logic.

Document Repagination - Document length can be dynamically adjusted on the fly by repaginating output based upon incoming data. This leads to reduced file size, email attachment size, archive size and fax delivery charges.

- Automatically processes and accounts for repeating line item data in your input file
- Full document repagination, forward and backward
- Document set-based repagination
- AutoSize controls the size of an object within a section
- Split sections (split output text attachments over a page)

Database Look-up - Assign lookup variables from within Create!form Designer to add data from external sources to the output stream. This minimizes the need to add data to root-level output. 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.

Subforms - Create!form Designer features Subform and Variable Sub-form technology. 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. Subforms can be placed in any position or size on the master form and can be rotated in any direction. When the time comes to change your address, fax number or logo, simply update the shared subform and all linked Create!form output is instantly updated.

ImageServer Utility - Working directly with the Variable Subform function, Create!form's Image Server utility automatically converts .jpg, .gif and .tiff 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.

Intelligent Tables - Create!form's intelligent table structure streamlines the formatting and management of your repeating line item data, allowing users to easily create an auto-expanding, auto-structuring table.

- Unlimited sorting and grouping levels, including the re-sorting of line item data. Sort line item output by product number, product name, weight or another specified data variable without making changes to the application.
- Auto-expanding line items accommodate variable detail information.
- Dynamic sub-totaling on page breaks and groups.

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, allowing users to eliminate the use of costly pre-printed check stock using the optional Create!micr™ module.

E-signature Field Insertion - PDF e-signature objects may be inserted into the final PDF document.

Environment Variables - Dynamically changes output content without requiring a separate project – ideal for applying watermarks for archived documents and more.

Flexible Project Formatting Controls - The Page Style Rules feature enables users to create event tables for page types including first page, continuation 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 allowing users to define the transactional document or process workflow of their application output. Using this solution, organizations can significantly improve the efficiency of their business document distribution based on the recipient's preferences, 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 directly from within Create!form Director for streamlined process modeling, no need to rely solely upon row/column/depth data or to switch between applications.
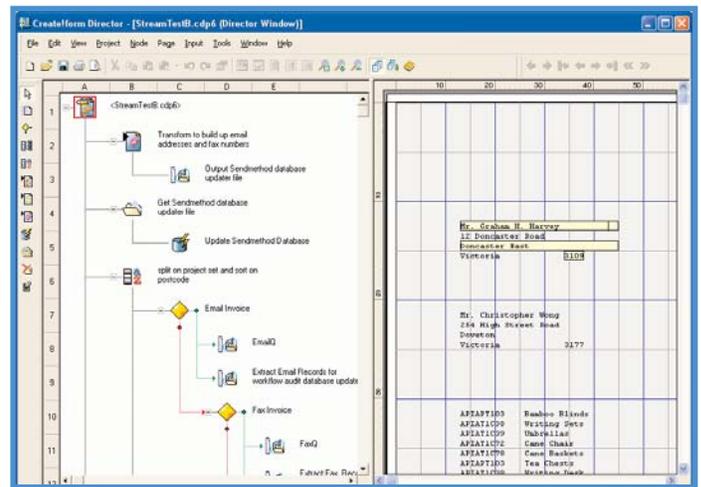
Point and Click Expression Building - Replaces time-consuming manual coding within your document formatting and handling application with simple, point and click expression building.

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.

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

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, users can archive copies of invoices on the finance server, then print 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 and deliver archived documents to the archive.

- **Sort** and reorganize documents within a job for more efficient distribution.

- **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 update databases, assemble detailed audit reports, print to line printers and 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.

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

- **Send** output directly to ftp and http destinations.

- **Configure User-Defined Processes and Workflows**, including the running/execution of external programs.

- **Database Update (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 databases and 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 PDF, PostScript or PCL files with full control over the filename. This feature provides tight integration with third-party products including document and content management.

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 your output has been generated, a built-in reprint management utility lets you search, select and reprint documents on the same physical printer, or on a different printer entirely. Document life span is administrator-defined, 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 new or updated scripts before deploying to the production directory.

ERP Migration Protection
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 the rapid migration of existing Create!form documents.

Output Destinations

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

Transactional Document Destination Modules

- **Create!print**® - Output has been optimized for use with PostScript® printers, however your Create!print license(s) will allow you to print to any Windows-compatible printer.

- **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 number retrieved from the base document or an external ODBC database reference. Cover sheet content can be personalized to the recipient.

- **Create!archive**® - A digital archive of all your final documents. This include full indexing, search and retrieval capabilities presented on the Web for easy access.

Transactional Payment Destination 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 to protect your MICR check printing environment from check fraud.

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