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AutoDocMail

GETTING STARTED WITH AUTODOCMAIL

SOFTWARE FOR AUTOMATIC DISTRIBUTION OF PDF DOCUMENTS VIA E-MAIL

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INTRODUCTION

WHAT IS IT?

The AutoDocMail is a software for automatic emailing of PDF documents. The recipients email addresses are either extracted from document's text or assigned either based on user-supplied "keyword-to-email" or "file name-to email" correspondence table. Each PDF file will be delivered as an email attachment in a separate email message. There are options to customize email message text, password protect outgoing files with passwords extracted from document's text and attach additional files to each email.

WHEN TO USE IT?

Use this software to automatically email files if you have:

1. Multiple PDF documents that need to be delivered to different recipients.
2. Single PDF document(s) that contains pages that needs to be delivered to different recipients.

Example 1: The software can take multiple PDF files that represent invoices and automatically search each file for an email addresses (including CC and BCC), if email address is found – email the file to the recipient.

Example 2: The software can take a single PDF file that contains multiple pay stubs (one page per stub), automatically split it into separate PDF files and send each file to the email address listed on each sub-document (pay stub).

Example 3: The software can search PDF file using a set of user-defined search keywords and assign the corresponding email recipients. Use this method to assign emails based on account numbers, company names, customer IDs and other similar entities.

The software can only split input PDF document into equal number of pages sub-documents. If you need to use more sophisticated document splitting technique then use AutoSplit plug-in for Adobe Acrobat: <http://www.evermap.com/AutoSplit.asp>.

FUNCTIONALITY OVERVIEW

The AutoDocMail software is designed to perform the following tasks:

- Automatically mass-distribute PDF documents to recipients whose email addresses (including "cc" and "bcc") are contained within the document.

This software allows the user to:

- Automatically search for and extract email addresses from PDF files.
- Automatically search for and extract email message subjects from PDF files.
- Search for user-defined keywords and assign corresponding email recipients.
- Assign email addresses based on the filenames.
- Split input documents into set of smaller documents with user-specified number of pages.

- Secure outgoing PDF documents with a password with specific access permissions (editing, printing, etc.).
- Automatically send documents for mass-distribution via email.
- Automatically maintain a message log that records date, time, file name, all recipients for each email message.

After the search and extraction, the user can edit the following for each email message:

- Add or remove email recipients.
- Modify message subject.
- Modify message content.

The software can be used to mass distribute emails via:

- Your current emailing software such as Microsoft Outlook.
- SMTP email servers such as Gmail or Hotmail.

SYSTEM REQUIREMENTS

The AutoDocMail is a plug-in for Adobe Acrobat (version 6.0 and up). It requires Windows OS versions 8, or 10.

Important: this product does not work with free Acrobat Reader, it requires full version of Adobe Acrobat.

The product information page is located at: <http://www.evermap.com/autodocmail.asp>.

DISTRIBUTING PDF DOCUMENTS – BASIC SETTINGS EXAMPLE

DISTRIBUTING PDF DOCUMENTS WITH EMAIL ADDRESSES CONTAINED WITHIN TEXT

We will demonstrate how to configure AutoDocMail to distribute individual pay stubs originating from a single PDF file. We begin with a single pdf document containing multiple pay stubs. Each page of the PDF document contains a pay stub for a recipient whose email address is written on that page. Here is the first page; recipient's email is highlighted:

ABC Corp.
450 Chamber Street
Somewhere, USA 01010

Employee Name: Mary Smith
Social Security #: 999-99-9999
Period End Date: 01/07/05

mary.smith@evermap.com
Password: sample6367

Wages					Deductions		
Description	Hours	Rate	Current Amount	Y-T-D Amount	Description	Current Amount	Y-T-D Amount
Regular	40.00	10.00	400.00	400.00	Federal Withholdings	37.29	37.29
Overtime	1.00	15.00	15.00	15.00	Social Security Tax	24.83	24.83
Holiday				0.00	Medicare	5.81	5.81
Tuition			37.43*	37.43	Tax	8.26	8.26
					NY State	5.11	5.11
					Income Tax	0.61	0.61
					NYC Income Tax		
					NY SUI/SDI Tax		
					Other		
					401(k)	27.15*	27.15
					Life Insurance	2.00	2.00
					Loan	30.00	30.00
					Dental	2.00*	2.00
					HMO	20.00*	20.00
					Dep Care FSA	30.00*	30.00
Totals			452.43	452.43	Deduction Totals	193.06	193.06
Taxable Gross			335.85	335.85			
					NET PAY	259.38	259.38

- Excluded from federal taxable wages

ABC Corp. 450 Chamber Street Somewhere, USA 01010	Payroll Advice of Credit	Advice # 00000000 Date 1/07/2005
Pay TWO HUNDRED FIFTY NINE AND 38/100 DOLLARS		
To the MARY SMITH Order of 215 MAIN STREET ANYTOWN, USA 98765		
NON-NEGOTIABLE		

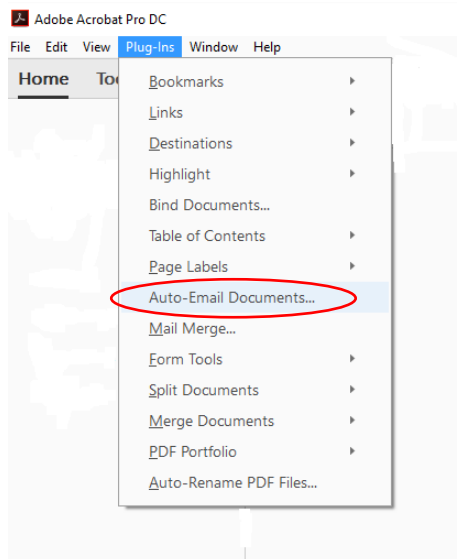
1
Details of applicable federal, state, and local taxes paid.

2
401(k) savings is a pre-tax deduction.

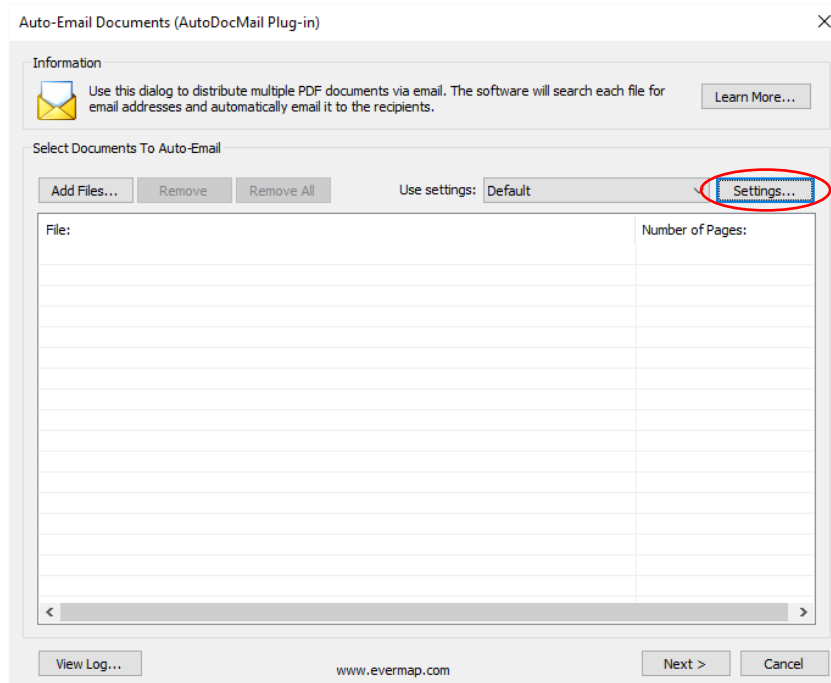
3
Flexible Spending Accounts (for health care, child or dependant care, parking expenses) are pre-tax deductions.

NOTE: The email address does not have to be visible on the page. It can be printed using white font on white background or be hidden by other page elements.

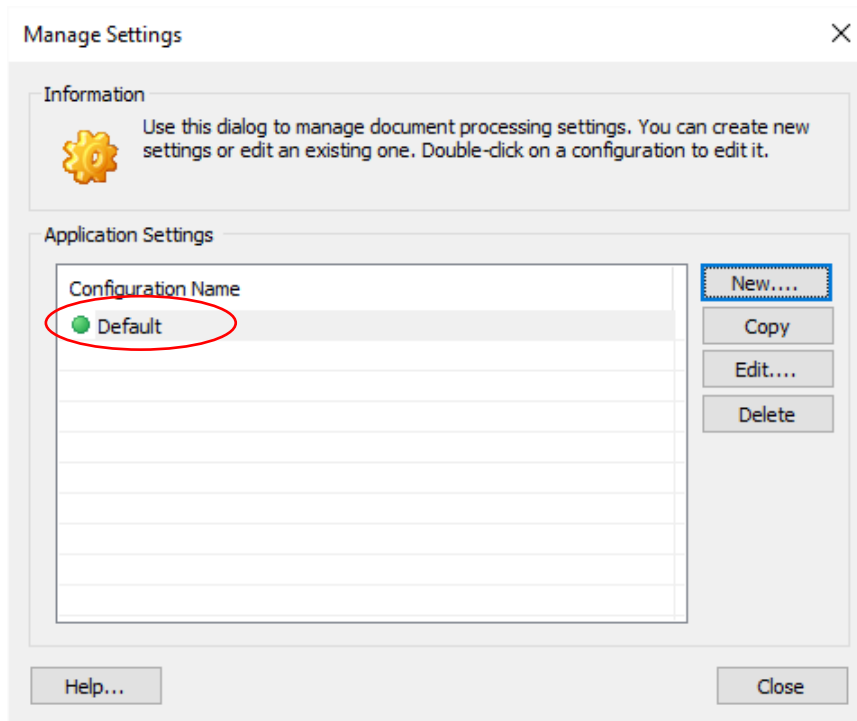
1. To begin, open Adobe Acrobat and select "Plug-ins > Auto-Email Documents..." from the "Plug-Ins" menu of Adobe Acrobat:



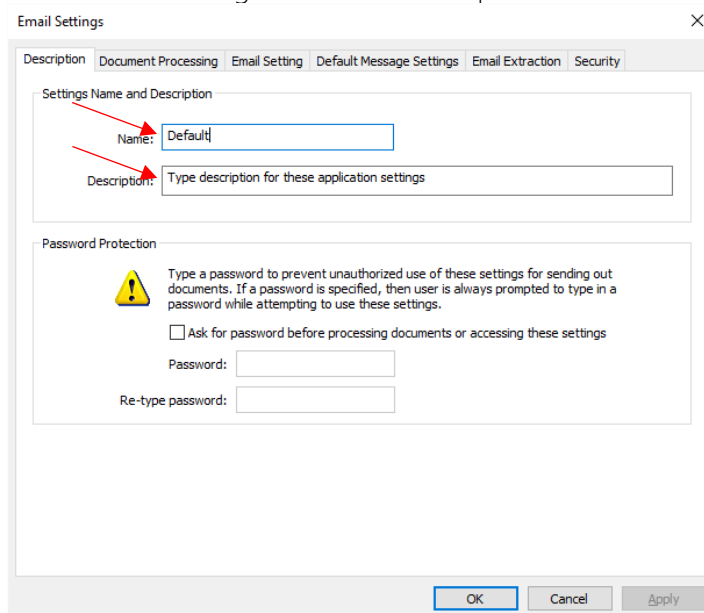
2. Assuming this is our first time using the plug-in for this purpose, we will need to configure the application preferences. This is a one-time procedure. You can change application preferences at any time by clicking the "Settings..." button:



3. The "Manage Settings" dialog will appear on the screen. Click the "New..." button to configure new settings or double-click on "Default" settings if you want to modify the default settings:

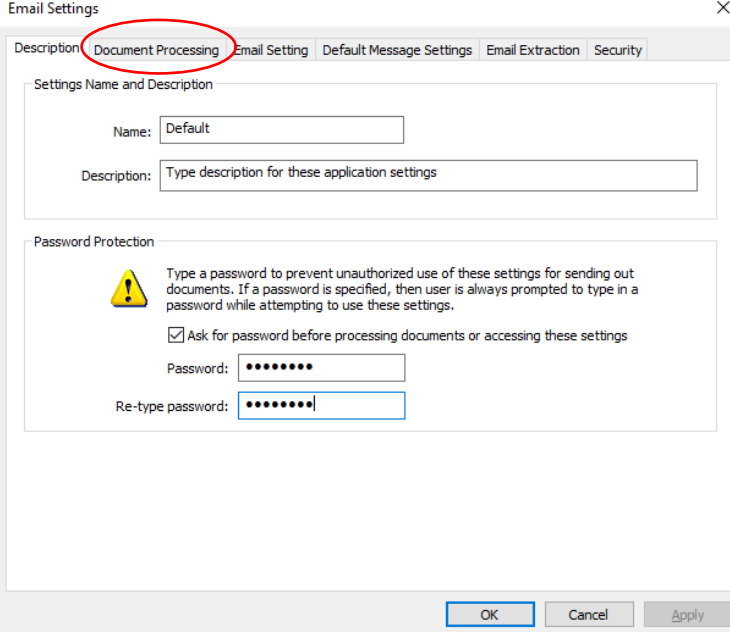


4. The "Email Settings" dialog will appear. Here, under the "Description" tab, you can change the Name of the settings and add a Description that describes this particular configuration:



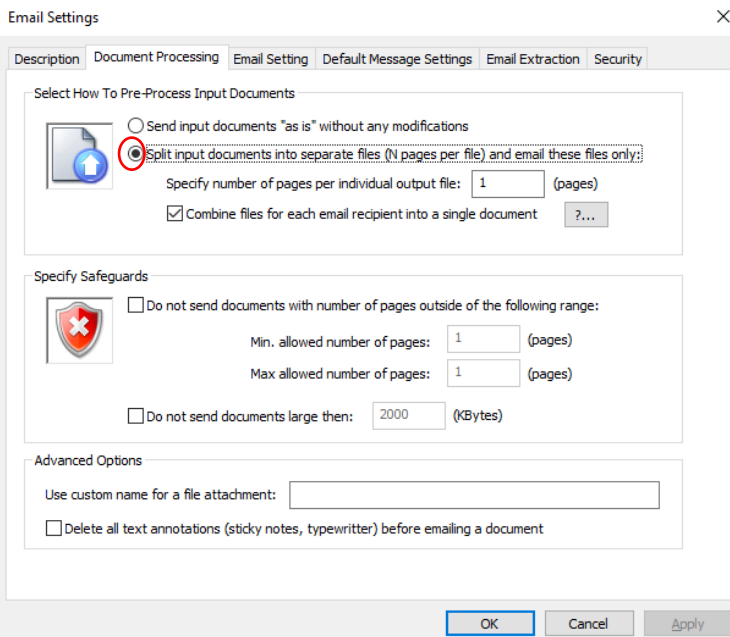
It is possible to password-protect a particular settings configuration to prevent unauthorized use of the application. Check "Ask for password before processing..." option if necessary.

5. Click on the “Document Processing” tab, to move to the next level of settings configuration:



The "Email Settings" dialog box is shown with the "Document Processing" tab selected. The "Settings Name and Description" section has "Name" set to "Default" and "Description" set to "Type description for these application settings". The "Password Protection" section has a warning icon and text: "Type a password to prevent unauthorized use of these settings for sending out documents. If a password is specified, then user is always prompted to type in a password while attempting to use these settings." There is a checked checkbox "Ask for password before processing documents or accessing these settings". Below this, "Password" and "Re-type password" fields are both filled with "*****". At the bottom are "OK", "Cancel", and "Apply" buttons.

6. Select “Split input documents into separate files...” option by clicking the preceding circle. This option is necessary because we are going to process a single PDF file that contains multiple sub-documents (pay stubs) and each sub-document needs to be emailed separate to a different recipient.



The "Email Settings" dialog box is shown with the "Document Processing" tab selected. The "Select How To Pre-Process Input Documents" section has two radio buttons: "Send input documents 'as is' without any modifications" and "Split input documents into separate files (N pages per file) and email these files only:". The second option is selected and circled. Below it, "Specify number of pages per individual output file:" is set to "1 (pages)". There is a checked checkbox "Combine files for each email recipient into a single document" with a "?..." button. The "Specify Safeguards" section has a shield icon and two checkboxes: "Do not send documents with number of pages outside of the following range:" (unchecked) and "Do not send documents large then:" (unchecked). The first checkbox has "Min. allowed number of pages:" set to "1 (pages)" and "Max allowed number of pages:" set to "1 (pages)". The second checkbox has "2000 (KBytes)". The "Advanced Options" section has "Use custom name for a file attachment:" (empty text box) and a checked checkbox "Delete all text annotations (sticky notes, typewriter) before emailing a document". At the bottom are "OK", "Cancel", and "Apply" buttons.

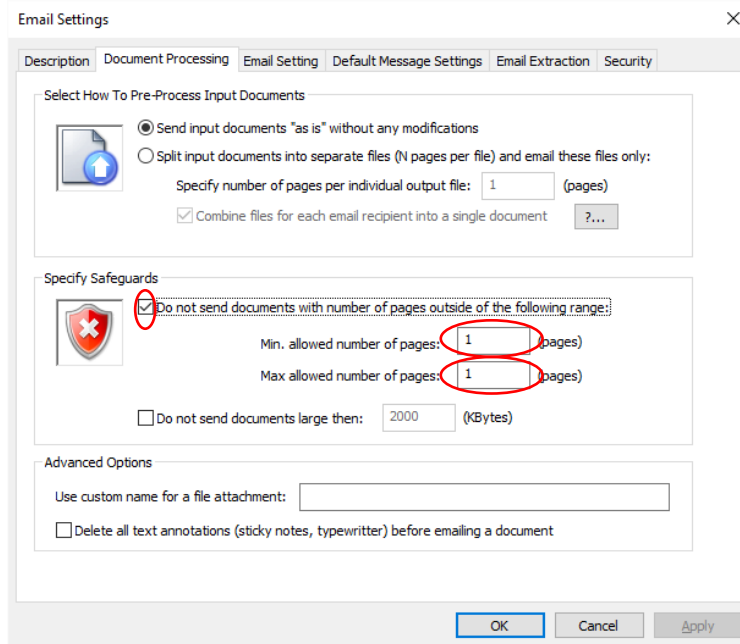
7. "Specify the number of pages per individual output file" by typing a number in the box. We type "1" since each pay stub occupies one page:

The screenshot shows the 'Email Settings' dialog box with the 'Document Processing' tab selected. Under 'Select How To Pre-Process Input Documents', the option 'Split input documents into separate files (N pages per file) and email these files only:' is selected. Below this, the 'Specify number of pages per individual output file' box contains the number '1'. The 'Combine files for each email recipient into a single document' checkbox is checked. The 'Specify Safeguards' section has three unchecked options. The 'Advanced Options' section has one unchecked option. The 'OK' button is highlighted.

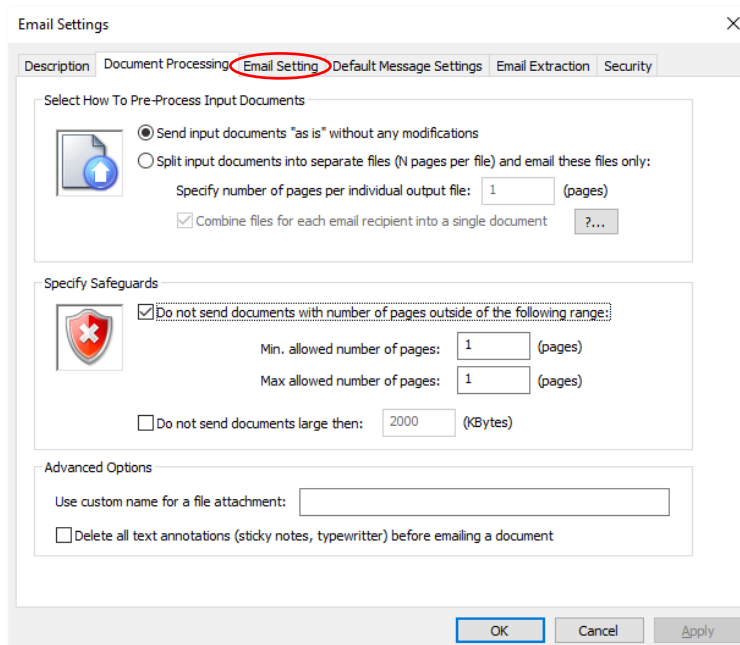
8. Check the box preceding "Combine files for each email recipient into a single document", to ensure that each recipient receives a single email, in case if there are multiple documents pages that addressed to the same email address. Do not use this option if there are multiple recipients of each document or CC/BCC addresses are used.

This screenshot is identical to the previous one, but with a red arrow pointing to the 'Combine files for each email recipient into a single document' checkbox, which is now checked. The 'OK' button remains highlighted.

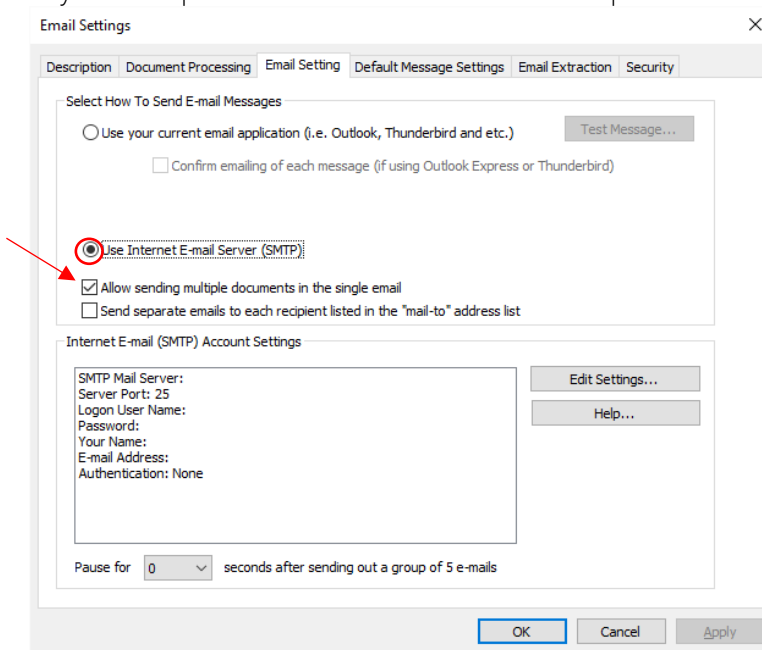
9. Check the box preceding "Do not send document with number of pages outside of the following range, then type "1" in the "Min allowed number of page" and "1" in the "Max allowed number of pages" as a safeguard to ensure that each recipient receives the correct document.



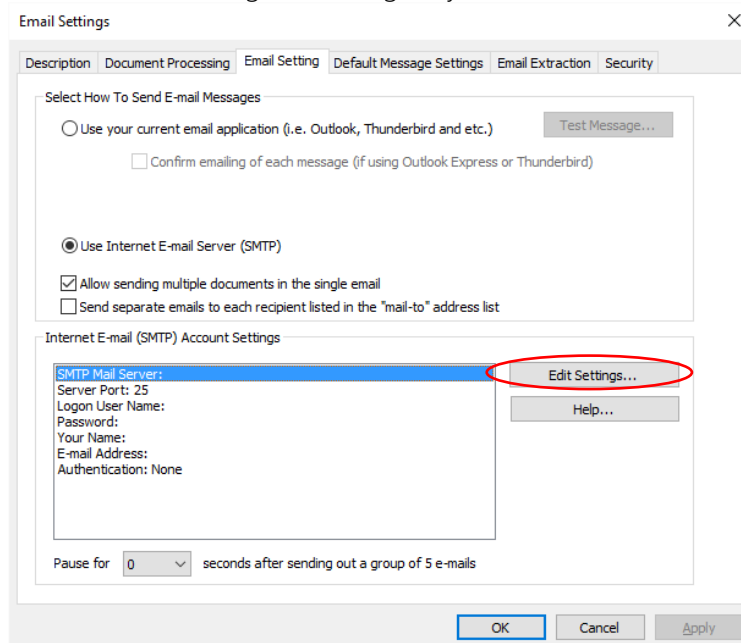
10. Click on the "Email Setting" tab, to move to the next level of settings configuration:



11. Select Use Internet E-mail Server (SMTP) by clicking the preceding circle. Make sure the checkbox preceding "Allow sending multiple documents in a single email" is checked if there may be multiple files addressed to the same recipient.



12. Click on "Edit Settings" to configure your Internet E-mail Account Settings:



13. Click on your email server listed under "Default Settings" and the application will auto-fill your email Server Information. If your email server is not listed, you will need to manually enter the Server Information. Please contact your IT department for exact SMTP server settings used at your organization.

Internet E-Mail Server Settings

Server Information

Outgoing SMTP mail server: smtp.gmail.com

Server Port Number: 465

Logon Information

User Name:

Password:

Authentication: Login

Use the following type of encrypted connection: SSL

User Information

Your Name:

E-mail Address:

Reply-To E-mail Address:

Test Account Settings

After filling information on this screen, we recommend your test your account settings by clicking the button below (requires internet connection).

Test Account Settings...

Default Settings

Press any button below to configure server settings to work with a selected SMTP server provider:

Gmail

Hotmail

Office 365

OK Cancel

14. Fill in your User Name and Password under “Logon Information”, then Your Name, E-mail Address and Reply-To E-mail Address under “User Information”:

Internet E-Mail Server Settings

Server Information

Outgoing SMTP mail server: smtp.gmail.com

Server Port Number: 587

Logon Information

User Name: sutherlandaquatics

Password:

Authentication: Login

Use the following type of encrypted connection: TLS

User Information

Your Name: Alexandra Sutherland

E-mail Address: sutherlandaquatics@gmail.com

Reply-To E-mail Address: sutherlandaquatics@gmail.com

Test Account Settings

After filling information on this screen, we recommend your test your account settings by clicking the button below (requires internet connection).

Test Account Settings...

Default Settings

Press any button below to configure server settings to work with a selected SMTP server provider:

Gmail

Hotmail

Office 365

OK Cancel

15. Click “Test Account Settings” to make sure e-mail server settings were configured correctly:

Internet E-Mail Server Settings

Server Information

Outgoing SMTP mail server: smtp.gmail.com

Server Port Number: 587

Logon Information

User Name: sutherlandaquatics

Password:

Authentication: Login

Use the following type of encrypted connection: TLS

User Information

Your Name: Alexandra Sutherland

E-mail Address: sutherlandaquatics@gmail.com

Reply-To E-mail Address: sutherlandaquatics@gmail.com

Test Account Settings

After filling information on this screen, we recommend your test your account settings by clicking the button below (requires internet connection).

Test Account Settings...

Default Settings

Press any button below to configure server settings to work with a selected SMTP server provider:

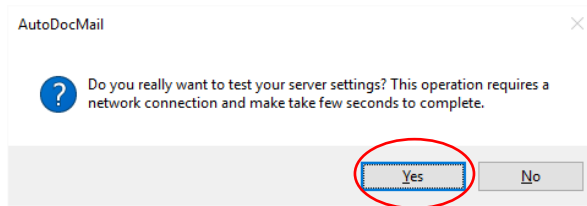
Gmail

Hotmail

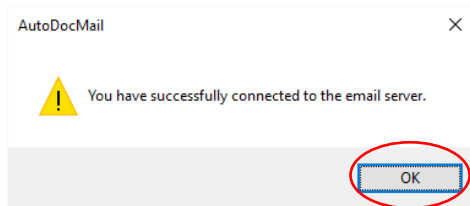
Office 365

OK Cancel

16. Click "Yes":

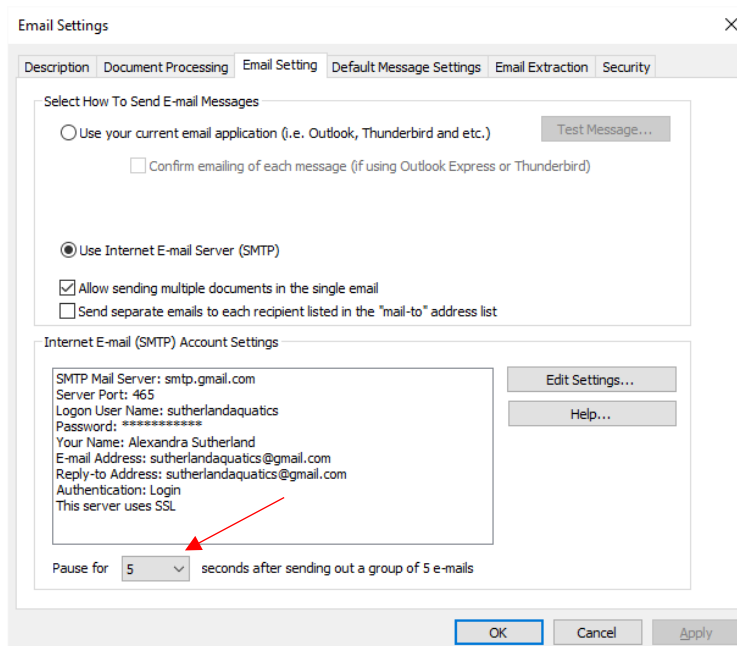


17. The following screen should appear if the application successfully connected to the server. Click "OK":



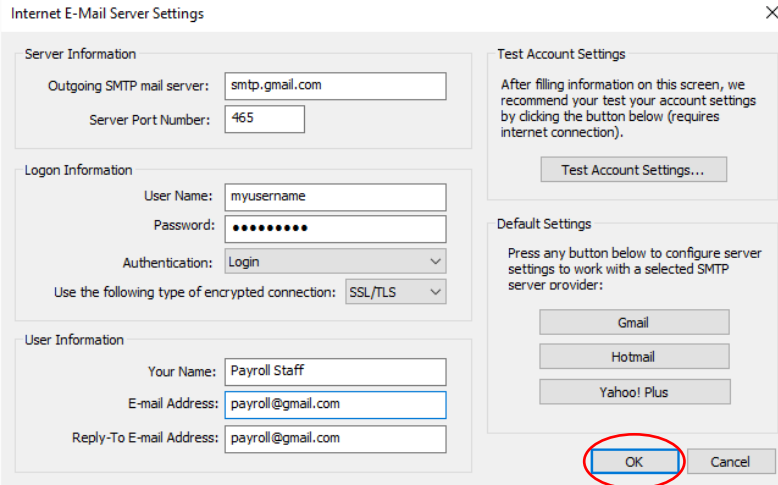
NOTE: If you receive an error message, and your login information is correct, you may need to go into your Gmail account and manually allow the application access into your account. To see if this is the case, simply check your Gmail e-mail and look for a message from Google notifying you of "a sign-in from a less secure app". That email should provide directions on how you can allow the application access.

18. If you are wanting to send e-mails to 100 recipients or more, you should configure the application to pause between sending emails. This action prevents your e-mails from being labeled as spam and your sending ability from being temporarily deactivated by your email service provider. Select the number of seconds you would like the application to pause from the drop-down menu (5 seconds is recommended for 500 or more recipients):



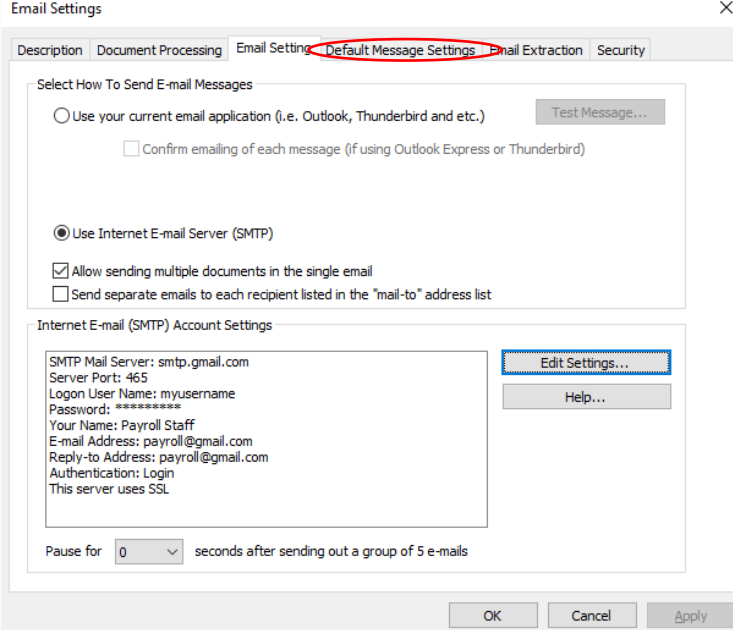
If you are planning to send a large number of emails, then please contact your email service provider to make sure you will not exceed a daily email quota and avoid spam filters.

Click "OK":



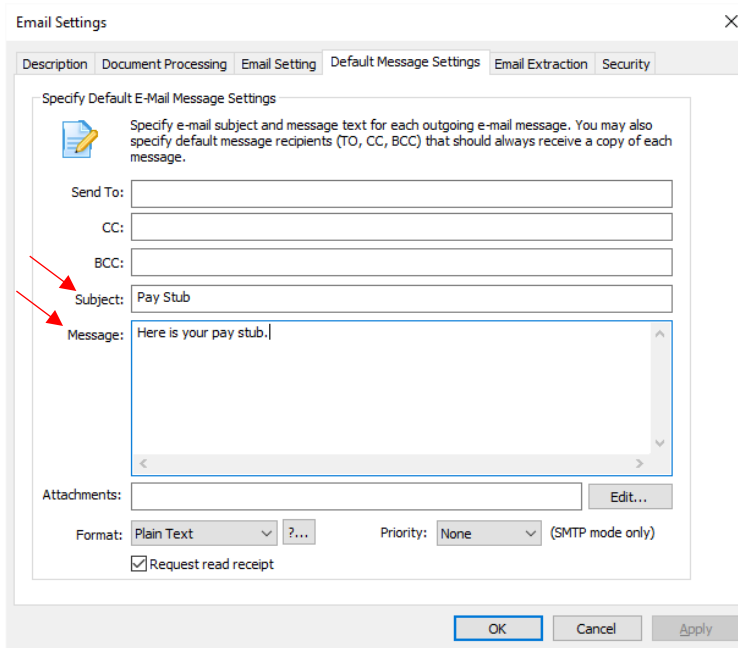
The "Internet E-Mail Server Settings" dialog box is shown. It contains several sections: "Server Information" with fields for "Outgoing SMTP mail server" (smtp.gmail.com) and "Server Port Number" (465); "Logon Information" with fields for "User Name" (myusername), "Password" (masked), "Authentication" (Login), and "Use the following type of encrypted connection" (SSL/TLS); "User Information" with fields for "Your Name" (Payroll Staff), "E-mail Address" (payroll@gmail.com), and "Reply-To E-mail Address" (payroll@gmail.com); "Test Account Settings" with a "Test Account Settings..." button; and "Default Settings" with buttons for "Gmail", "Hotmail", and "Yahoo! Plus". The "OK" button is circled in red.

19. Click on the "Default Message Settings" tab, to move to the next level of settings configuration:



The "Email Settings" dialog box is shown. It has tabs for "Description", "Document Processing", "Email Setting", "Default Message Settings", "Email Extraction", and "Security". The "Default Message Settings" tab is selected and circled in red. The "Select How To Send E-mail Messages" section has two radio buttons: "Use your current email application (i.e. Outlook, Thunderbird and etc.)" and "Use Internet E-mail Server (SMTP)". The "Use Internet E-mail Server (SMTP)" option is selected. Below it, there are checkboxes for "Allow sending multiple documents in the single email" (checked) and "Send separate emails to each recipient listed in the 'mail-to' address list" (unchecked). The "Internet E-mail (SMTP) Account Settings" section shows a summary of the SMTP settings: "SMTP Mail Server: smtp.gmail.com", "Server Port: 465", "Logon User Name: myusername", "Password: *****", "Your Name: Payroll Staff", "E-mail Address: payroll@gmail.com", "Reply-to Address: payroll@gmail.com", "Authentication: Login", and "This server uses SSL". There are "Edit Settings..." and "Help..." buttons. At the bottom, there is a "Pause for" dropdown set to "0" seconds. The "OK", "Cancel", and "Apply" buttons are at the bottom right.

20. Type the text for the message Subject and body Message for all outgoing emails in the appropriate space. You can also specify TO, CC, and BCC recipients, who will always receive a copy of each email.

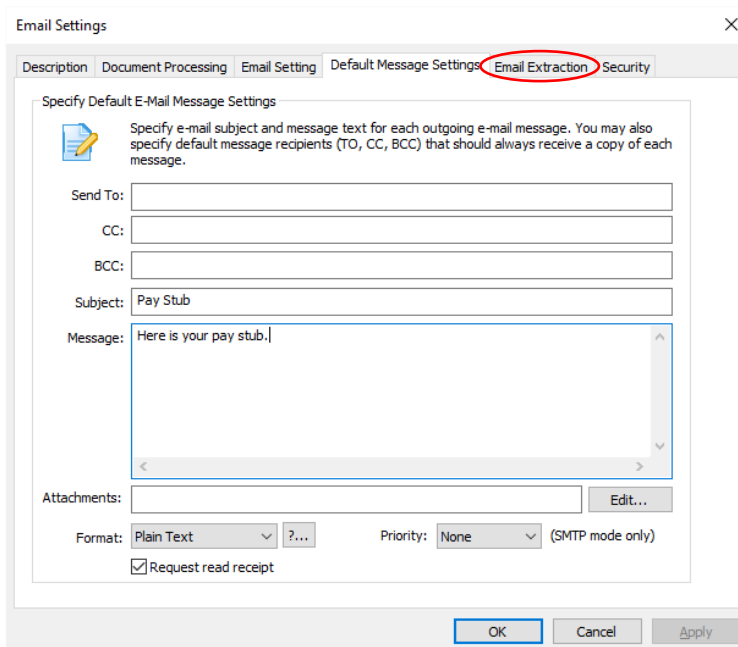


The screenshot shows the 'Email Settings' dialog box with the 'Default Message Settings' tab selected. The 'Specify Default E-Mail Message Settings' section contains the following fields and options:

- Send To:** Text input field.
- CC:** Text input field.
- BCC:** Text input field.
- Subject:** Text input field containing 'Pay Stub'. Two red arrows point to this field.
- Message:** Text area containing 'Here is your pay stub.'.
- Attachments:** Text input field with an 'Edit...' button.
- Format:** Dropdown menu set to 'Plain Text' with a '?...' button.
- Priority:** Dropdown menu set to 'None' with '(SMTP mode only)' text.
- ☒ Request read receipt

At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

21. Click on the "Email Extraction" tab, to move to the next level of settings configuration:

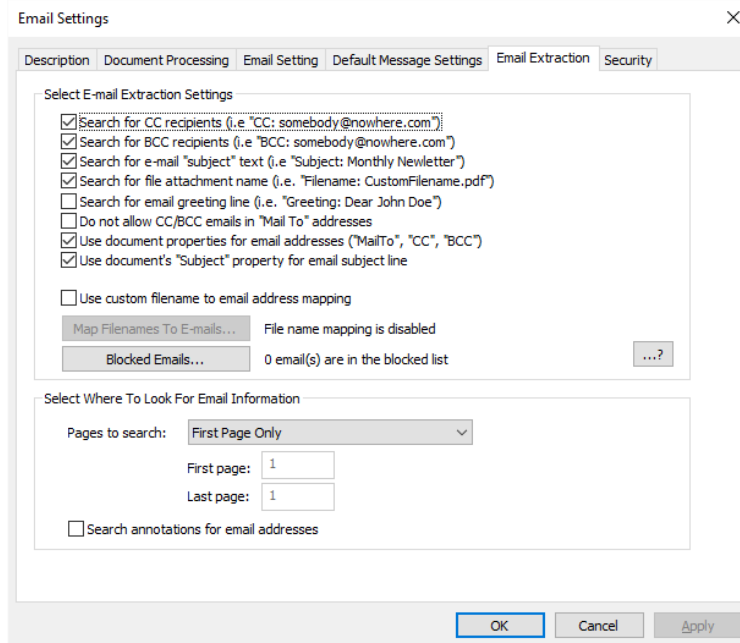


The screenshot shows the 'Email Settings' dialog box with the 'Email Extraction' tab selected. The 'Specify Default E-Mail Message Settings' section contains the same fields and options as the previous screenshot:

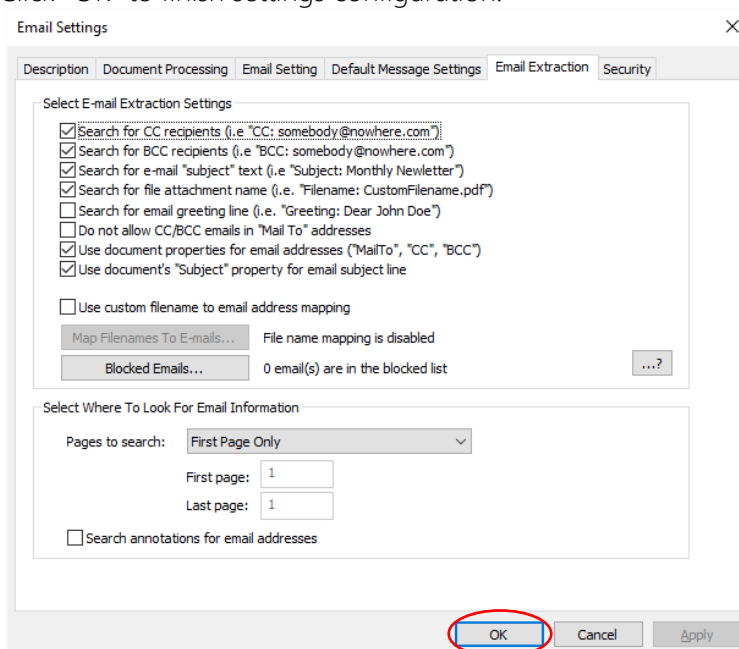
- Send To:** Text input field.
- CC:** Text input field.
- BCC:** Text input field.
- Subject:** Text input field containing 'Pay Stub'.
- Message:** Text area containing 'Here is your pay stub.'.
- Attachments:** Text input field with an 'Edit...' button.
- Format:** Dropdown menu set to 'Plain Text' with a '?...' button.
- Priority:** Dropdown menu set to 'None' with '(SMTP mode only)' text.
- ☒ Request read receipt

At the bottom are 'OK', 'Cancel', and 'Apply' buttons. The 'Email Extraction' tab is circled in red.

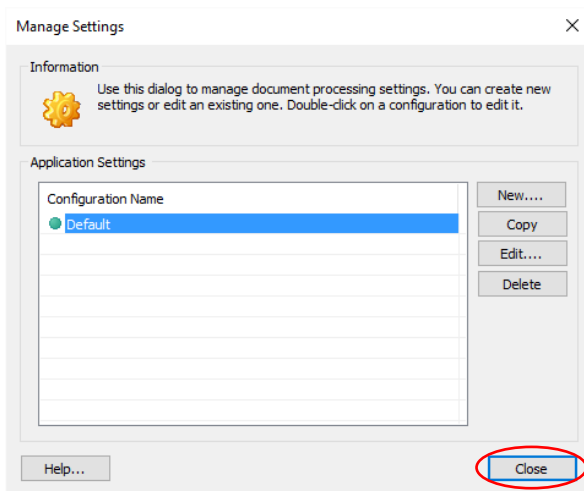
22. This is an advanced settings page, which supports various text-recognition features. The application can recognize and extract information from within the document text. For example, if you check the box for "Search for CC recipients," you can specify a CC recipient within the text using the keyword "CC:" followed by the email address; the application will then recognize and extract the CC information for each document. The plugin supports other keywords, such as "BCC," "Subject," "Filename," and "Greeting." Please see the **Advanced Settings** section of this guide below for more information on these settings.



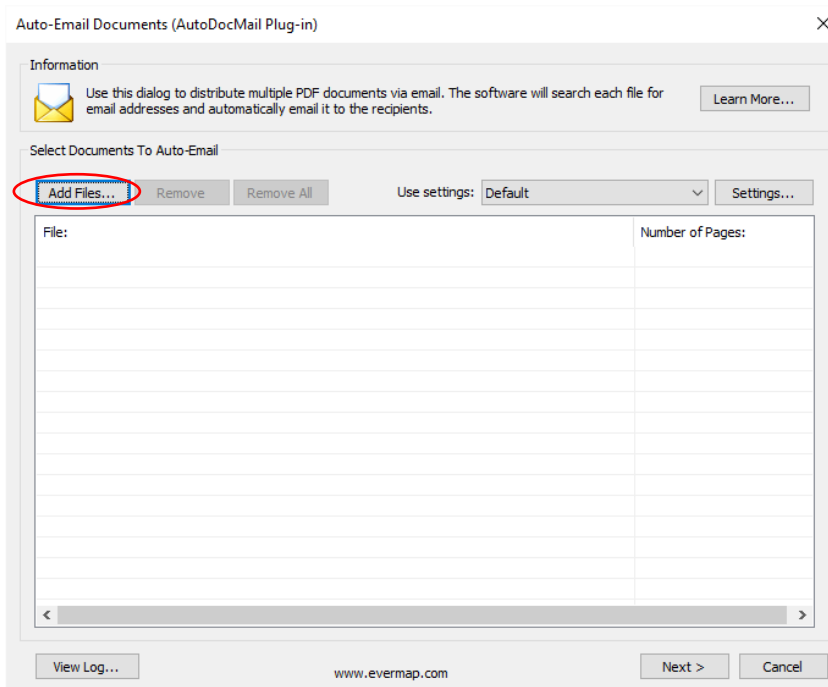
23. Unless you require advanced settings, you do not need to modify anything in the "Email Extraction" tab, or the "Security" tab (See **Advanced Settings** below for help with these settings). Click "OK" to finish settings configuration:



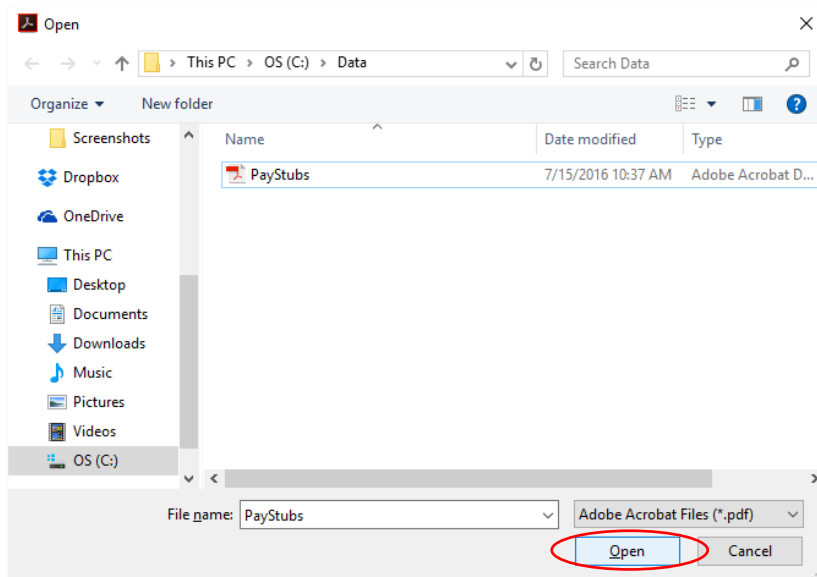
24. Click "Close" to finish settings configuration and proceed to processing your documents.



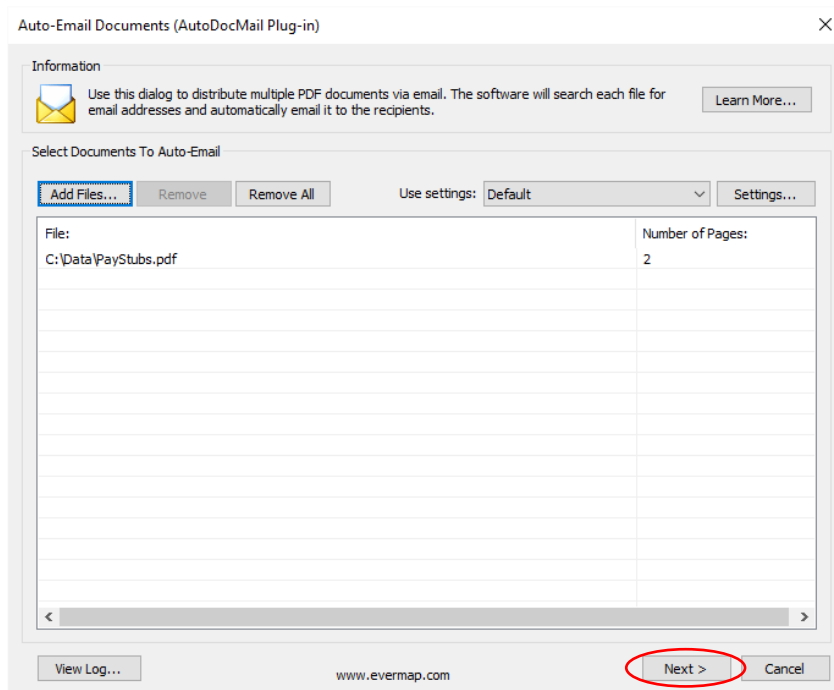
25. The "Auto-Email Documents" dialog will appear on the screen. Click the "Add Files..." button to select the source PDF file that needs to be distributed:



26. Select one or more input files in the “Open” dialog, then click “Open”:



27. Click “Next >”.



28. Once your document is split and processed, you will see the “Confirm Email Recipients” screen, which will list the extracted information for each recipient. Each recipient’s e-mail address, Subject, and Attachment for each message should be listed. A green preceding circle indicates successful processing. Double-click on any record in the list to preview the document and/or

modify the e-mail settings:

A screenshot of a software window titled "Confirm Email Recipients - 2 document(s)". At the top are three tabs: "Select", "Sort", and "Export". Below them is a grey instruction bar that says "Double-click on any record to modify its email settings or preview the document:". The main area contains a table with three columns: "Email To:", "Subject:", and "Attachment:".

Email To:	Subject:	Attachment:
<input checked="" type="checkbox"/> mary.smith@evermap.com	Pay Stub	C:\Users\Alexandra\AppData\Roaming\EverMap\AutoDocMail\TempFile...
<input checked="" type="checkbox"/> john.doe@evermap.com	Pay Stub	C:\Users\Alexandra\AppData\Roaming\EverMap\AutoDocMail\TempFile...

A red arrow points from the left side of the screen to the checkbox next to "john.doe@evermap.com". At the bottom left is a checkbox labeled "Show Passwords, CC, BCC recipients (resize window to see more content)". On the right are three buttons: "Copy Unchecked File(s)...", "Send" (highlighted with a blue border), and "Cancel". A scrollbar is visible at the bottom of the table.

NOTE: The application creates temporary files when splitting the single large document into smaller documents. The attachment pathways listed on this screen reflect these temporary files, which will be deleted once processing is complete.

29. You can review each attachment. To modify the recipients (TO, CC, BCC), Subject, and Message content of each e-mail by click on "Edit Email Settings":

Edit Email Settings...

PayStubsDoc1.pdf

AIRC Corp. 430 Chandler Street Somersham, USA 01010	Employee Name: Mary Smith Social Security #: 999-99-9999 Period End Date: 01/01/01 Payroll ID: nsmptst357
--	--

Wages				Deductions			
Description	Hours	Rate	Current Amount	Y-T-D Amount	Description	Current Amount	Y-T-D Amount
Regular	40.00	10.00	400.00	400.00	Federal Withholdings	37.29	37.29
Overtime	1.00	15.00	15.00	15.00	Social Security Tax	24.83	24.83
Holiday			0.00	0.00	Medicare	5.81	5.81
Tuition		37.43*	37.43	37.43	Tax	6.26	6.26
					NY State	3.11	3.11
					Income Tax	0.61	0.61
					NYC Income Tax		
					NY S&D/STI Tax		
					State		
					Life Insurance	27.15*	27.15
					Loan	2.00	2.00
					Charity	30.00	30.00
					Disability	2.00*	2.00
					VMOA	30.00*	30.00
					Dep Care FSA	30.00*	30.00
Totals			432.43	432.43	Deduction Totals	193.08	193.08
Taxable Gross			333.83	333.83			
					NET PAY	250.38	250.38

* Excluded from federal taxable wages

AIRC Corp. 430 Chandler Street Somersham, USA 01010	Payroll Advice of Credit Advice # 00000000 Date 1/07/2005
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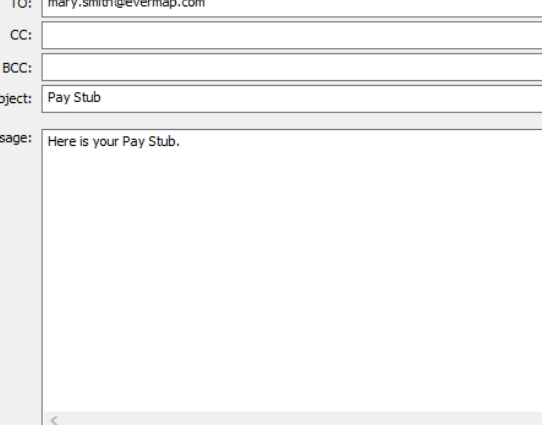
Pay TWO HUNDRED FIFTY NINE AND 38/100 DOLLARS

To the: MARY SMITH
Order of: 213 MAIN STREET
ANTYTOWN, USA 06763

NON-NEGOTIABLE

The Subject and Message that appears in this window is the default that we defined in

"Settings" at the beginning of this tutorial. You can modify all fields for each message by typing in the appropriate boxes; click "OK" when finished:



Edit Email Message [X]

TO: mary.smith@evermap.com

CC:

BCC:

Subject: Pay Stub

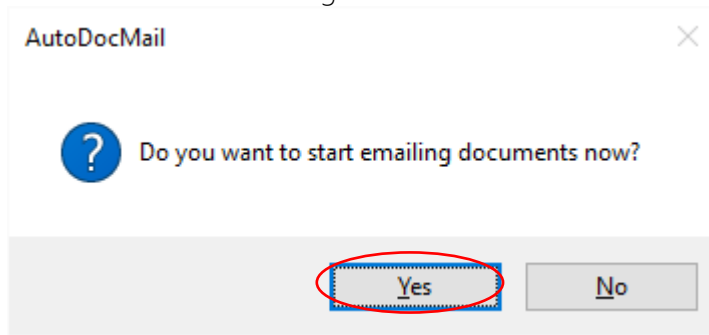
Message: Here is your Pay Stub.

OK Cancel

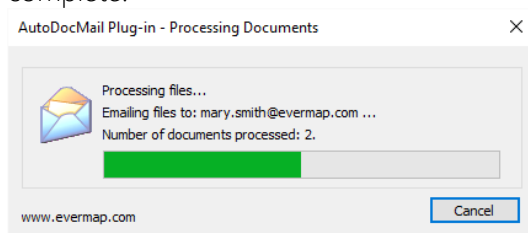
30. You can control which recipients will receive e-mails, as only those recipients with a checkmark in the box preceding their e-mail address will receive e-mails. Once you have reviewed and are satisfied with the mass-mailing arrangement, click "Send":

The screenshot shows a window titled "Confirm Email Recipients - 2 document(s)". At the top are buttons for "Select", "Sort", and "Export". Below them is a grey bar with the instruction: "Double-click on any record to modify its email settings or preview the document:". The main area contains a table with three columns: "Email To:", "Subject:", and "Attachment:". The first two rows have checked checkboxes next to email addresses "mary.smith@evermap.com" and "john.doe@evermap.com", both with green status icons. Their subjects are "Pay Stub" and their attachments are identical file paths starting with "C:\Users\Alexandra\AppData\Roaming\EverMap\AutoDocMail\TempFile...". A scrollbar is visible at the bottom of the table. Below the table is a checkbox labeled "Show Passwords, CC, BCC recipients (resize window to see more content)". At the bottom right are three buttons: "Copy Unchecked File(s)...", "Send" (highlighted with a red circle), and "Cancel".

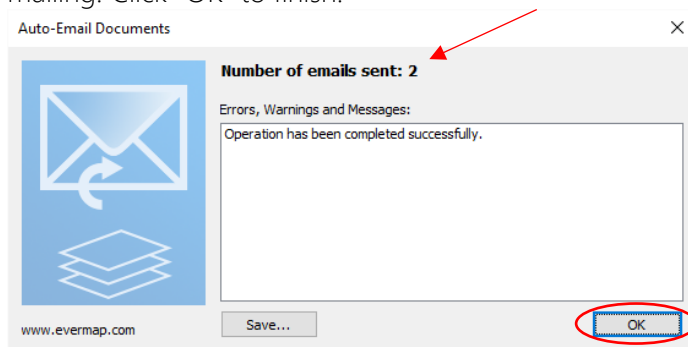
31. Click "Yes" to start emailing documents.



32. The "AutoDocMail Plug-in- Processing Documents" window will pop-up on the screen indicating the processing progress. This window will disappear once mass-distribution of all documents is complete.



33. The "Auto Email Documents" window will tell you how many total emails were sent and will inform you of whether the operation was successful or if any errors were experienced during e-mailing. Click "OK" to finish:



ADVANCED SETTINGS

ADVANCED FUNCTIONALITY OVERVIEW

The AutoDocMail software can optionally perform the following advanced tasks:

- Automatically email PDF documents to the recipients based on custom keyword search.
- Automatically email PDF documents to the recipients whose email addresses are contained within a custom filename-to-email address map.

This software allows the user to set up the following security features:

- Secure settings configurations with a password to restrict usage of those settings.
- Secure outgoing PDF documents with a document “open” password.
- Secure outgoing PDF document with document access password and restrictions.

This software can extract email addresses (including “cc” and “bcc”) and email message subjects from PDF files’:

- Text
- Annotations
- Properties

USING KEYWORDS-TO-EMAILS MAPPING TABLE

Many business documents do not contain email addresses as part of the document content. If you are wanting to send documents that do not contain recipients’ email addresses within the text, but you do have unique keywords that can be directly associated with email addresses, then you can create a custom keywords-to-email address map. This method allows you to manually assign email addresses of the recipients based on presence of the specific search keywords. For example, use this method to assign emails based on account numbers, customer IDs, SSNs, company names and other similar items. This method is suitable for the cases when documents are regularly emailed to the same group of recipients.

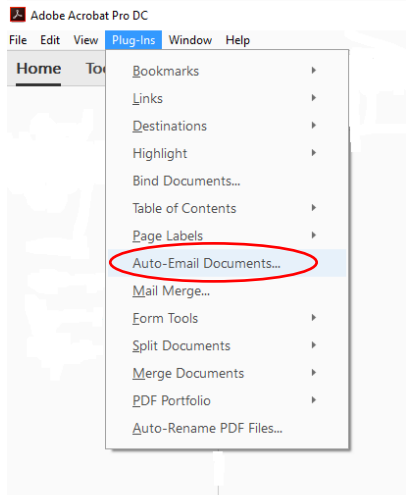
The keyword-to-email mapping table is defined as a series of comma-delimited text lines. The search keyword is followed by the corresponding email address:

ACME SYSTEMS, orders@acmesystems.com
 ABCD LABS, invoices@abcdlabs.com
 PACIFIC SHIPPING, invoices@pacificshipping.com
 “FOREST PRODUCTS, INC.”, invoice@forestpr.com; maryann@forestpr.com

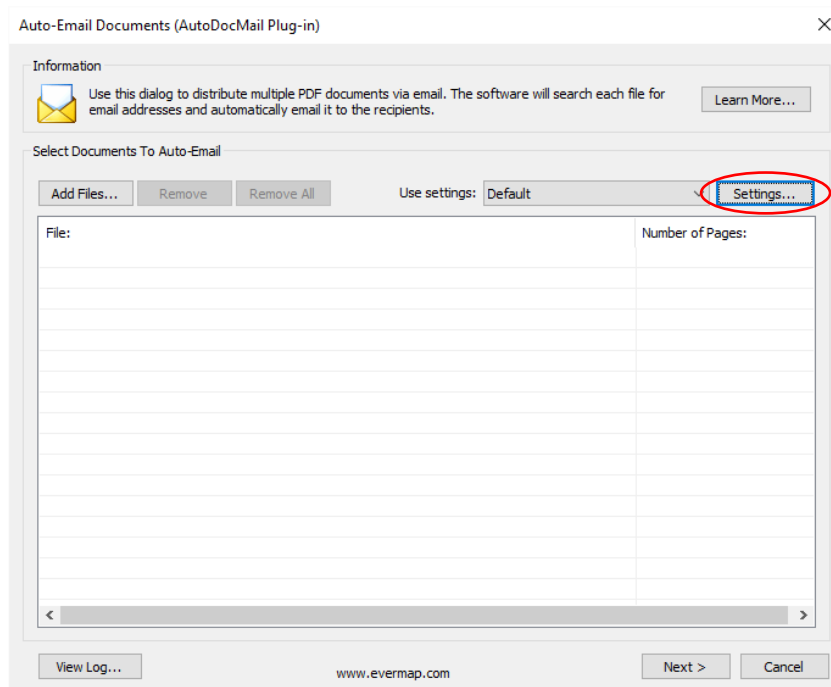
If the search keyword contains one or more commas, then it needs to be surrounded with quotation marks. The input documents are searched for the keywords, and email addresses are assigned based on the successful matches. This method is only applicable for the “mail-to” email addresses and cannot be used for CC and BCC.

Use the instructions below for configuring a keyword-to-email mapping.

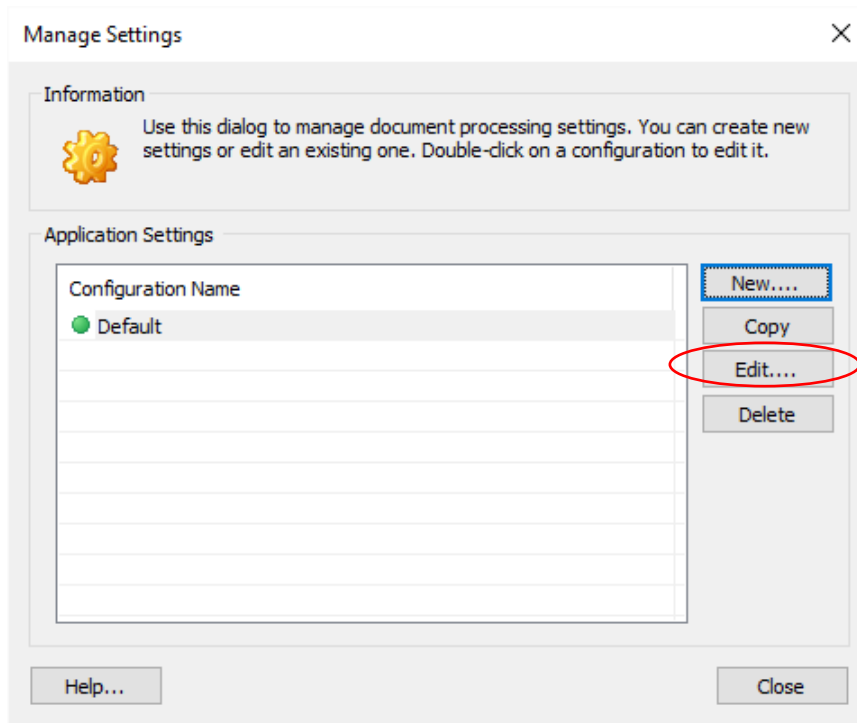
1. Open the AutoDocMail plug-in by selecting "Plug-ins > Auto-Email Documents..." from the Plug-in menu of Adobe Acrobat:



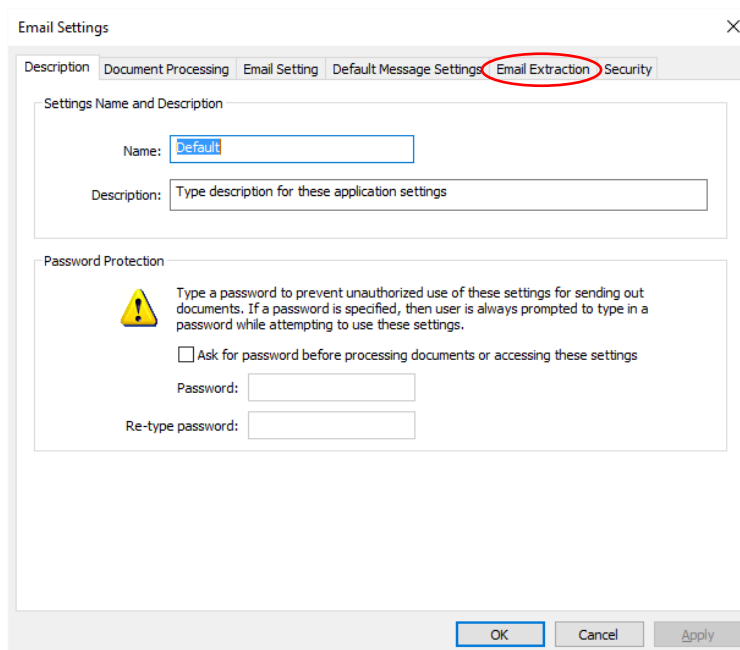
2. Click the "Settings..." button:



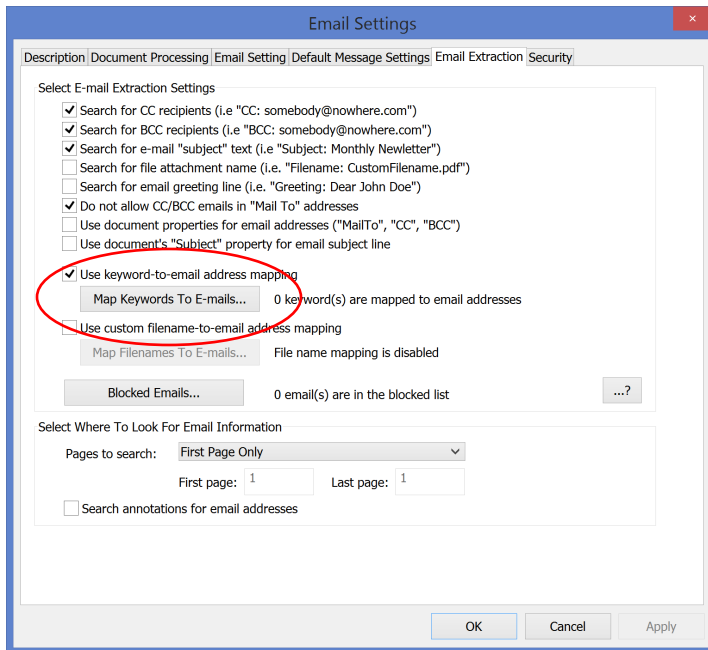
3. The “Manage Settings” dialog will appear on the screen. Select the settings configuration that you wish to edit, then click the “Edit” button:



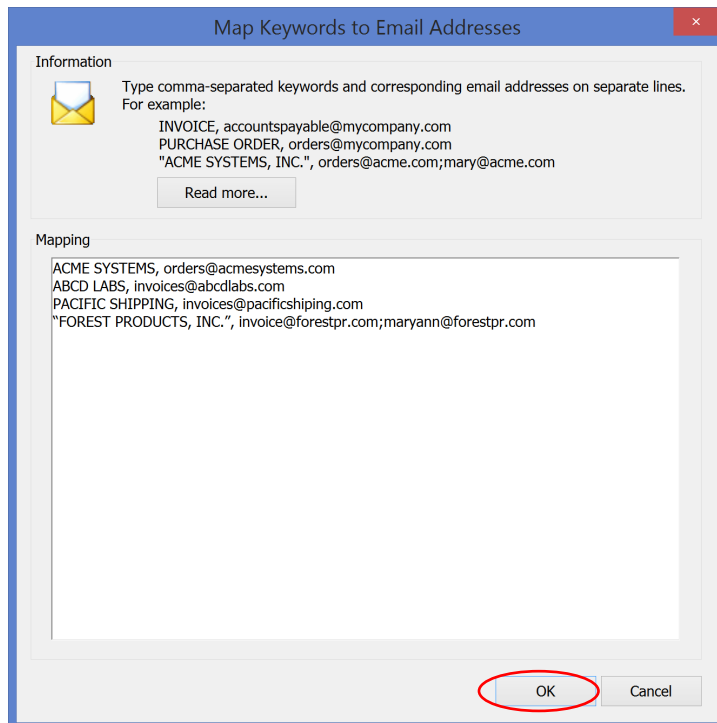
4. Click on the “Email Extraction” tab:



5. Select "Use keyword-to-email address mapping" option and press "Map Keywords To E-mails" button:



6. Type the search keyword, followed by a comma, followed by the email address of the corresponding recipient (one keyword per line). Separate multiple email addresses with a semicolon if it is necessary to specify more than one email. Press OK button once done.



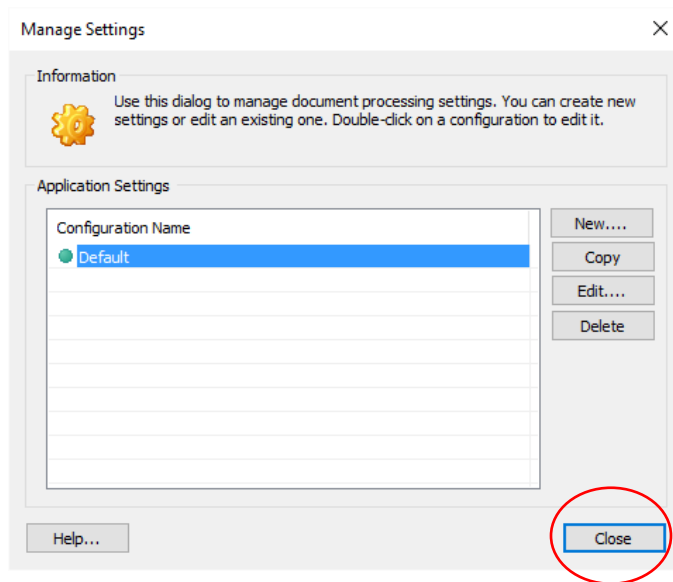
TIP: If a file name contains a comma character, then surround file name with quotation marks:

"Forest Products, Inc.", john.doe.@mycompany.com.

Optionally, you can specify additional email parameters such as "Subject", "CC", "BCC", "Filename", "Greeting", "From", "Replyto". For example, use the following syntax to add a subject line, a custom greeting and CC email address to the email mapping table:

"John Doe Junior", invoices@acme.com|subject:Enter a custom subject line|greeting:Dear John Doe Junior|cc:info@acme.com

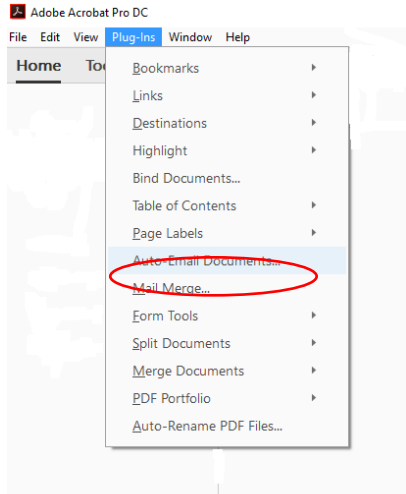
7. Click "Close" to finish settings configuration and proceed to processing your documents.



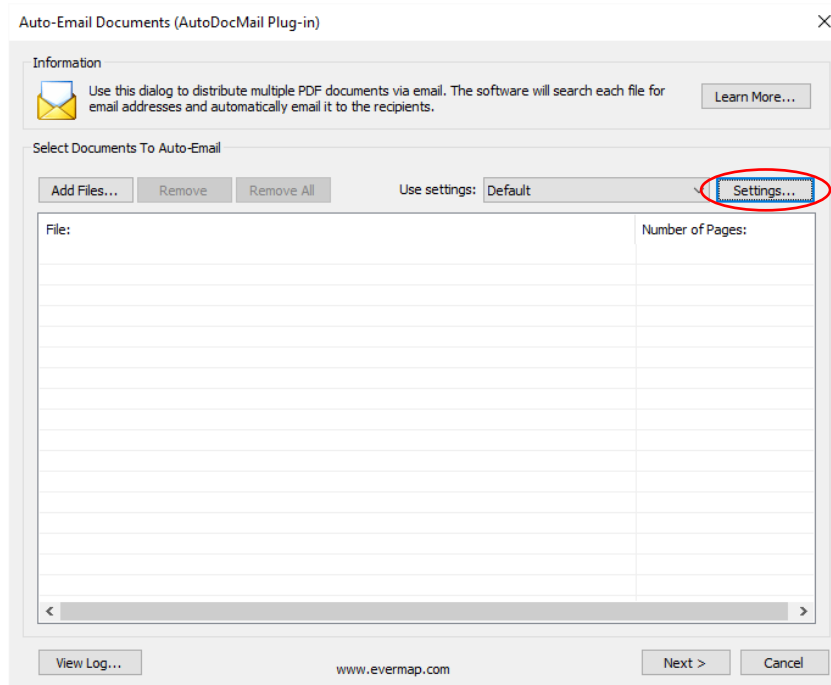
USING CUSTOM FILENAME-TO-EMAIL MAPPING TABLE

If you are wanting to send documents that do not contain recipients' email addresses within the text, but you do have unique filenames that can be directly associated with email addresses, then you can create a custom filename-to-email address map. This method allows you to manually assign email addresses of the recipients you wish to receive particular documents.

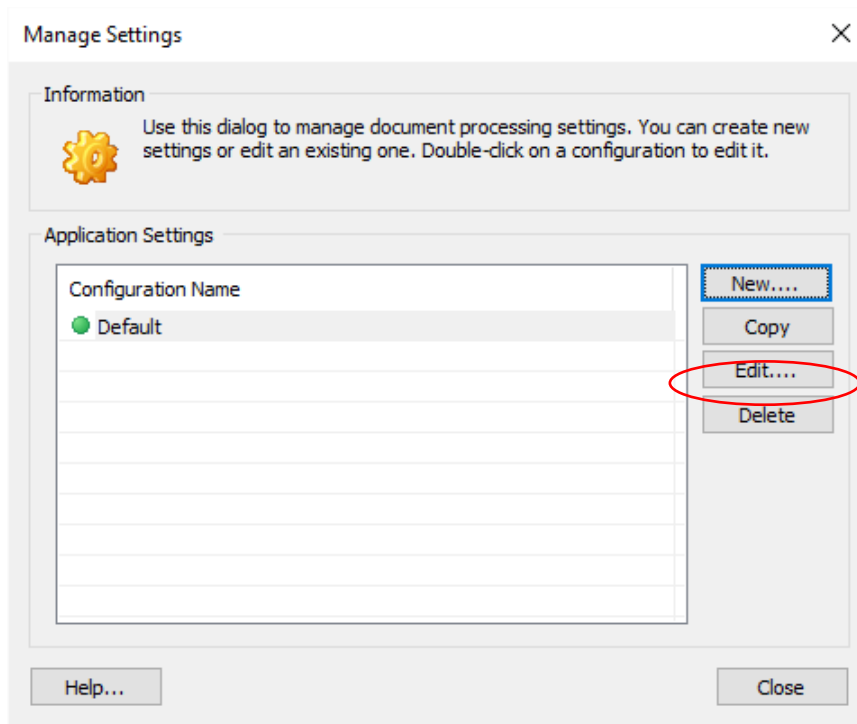
1. Open the AutoDocMail plug-in by selecting "Plug-ins > Auto-Email Documents..." from the Plug-in menu of Adobe Acrobat:



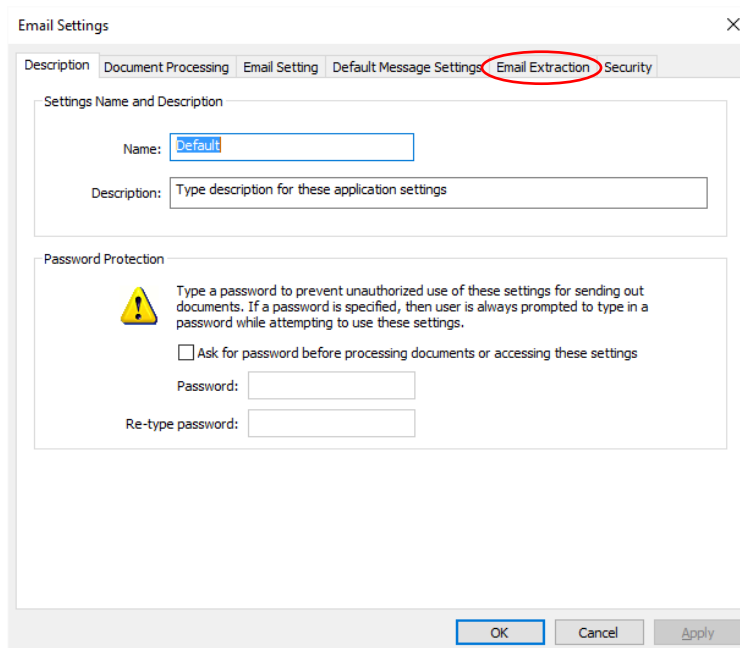
2. Click the "Settings..." button:



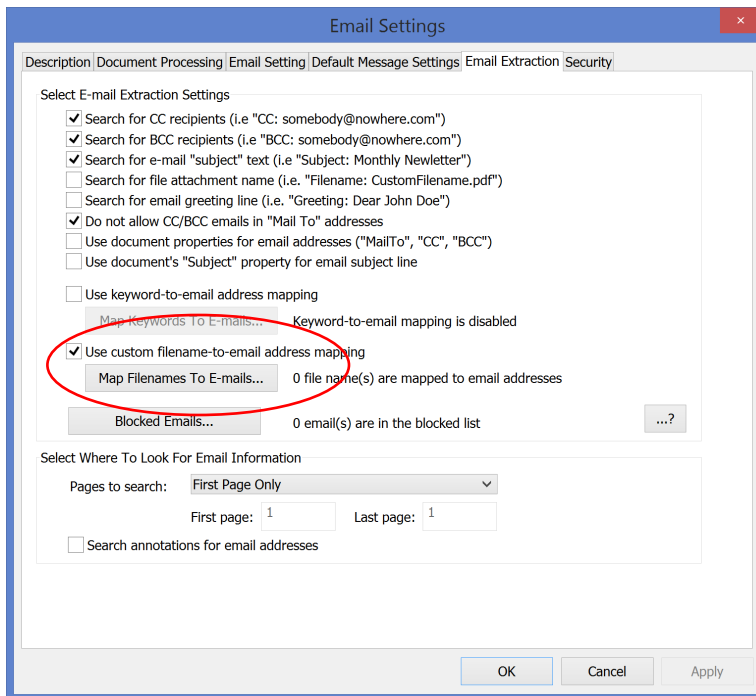
3. The "Manage Settings" dialog will appear on the screen. Select the settings configuration that you wish to edit, then click the "Edit" button:



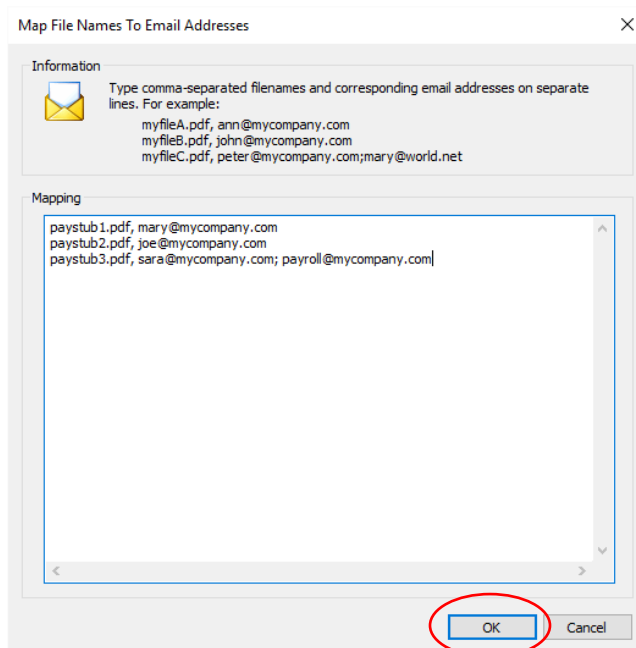
- Click on the "Email Extraction" tab:



- Click on the box preceding "Use custom filename to email address mapping" and press "Map Filenames to E-mails" button:



6. Type the filename, followed by a comma, followed by the email address of the corresponding recipient. Each line should contain only one filename and its recipient/s. If you need to specify more than one recipient per filename, then separate the email addresses with a semicolon:



TIP: If a file name contains a comma character, then surround file name with quotation marks:
 "paystub, John Doe.pdf", john.doe.@mycompany.com.

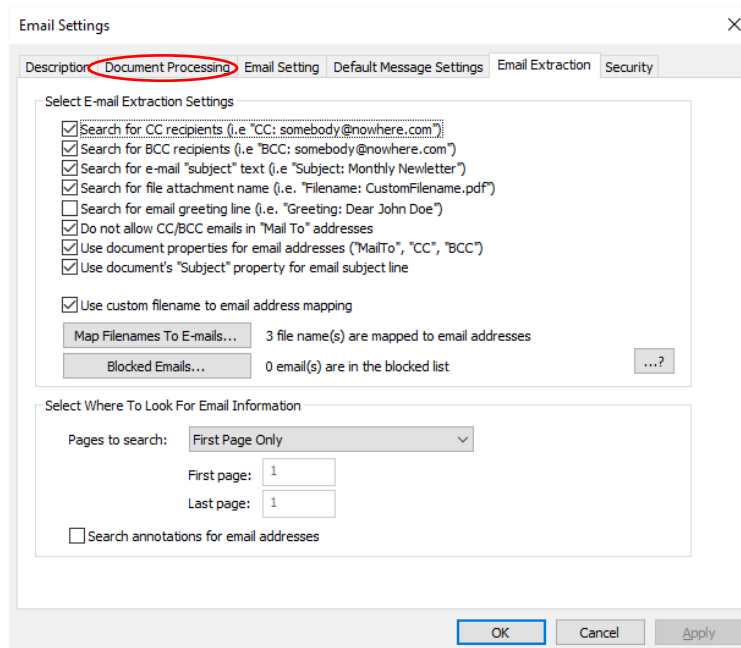
Optionally, you can specify additional email parameters such as "Subject", "CC", "BCC", "Filename", "Greeting", "From", "Replyto". For example, use the following syntax to add a subject line, a custom greeting and CC email address to the email mapping table:

`JohnDoe.pdf, invoices@acme.com|subject:Enter a custom subject line|greeting:Dear John Doe Junior|cc:info@acme.com`

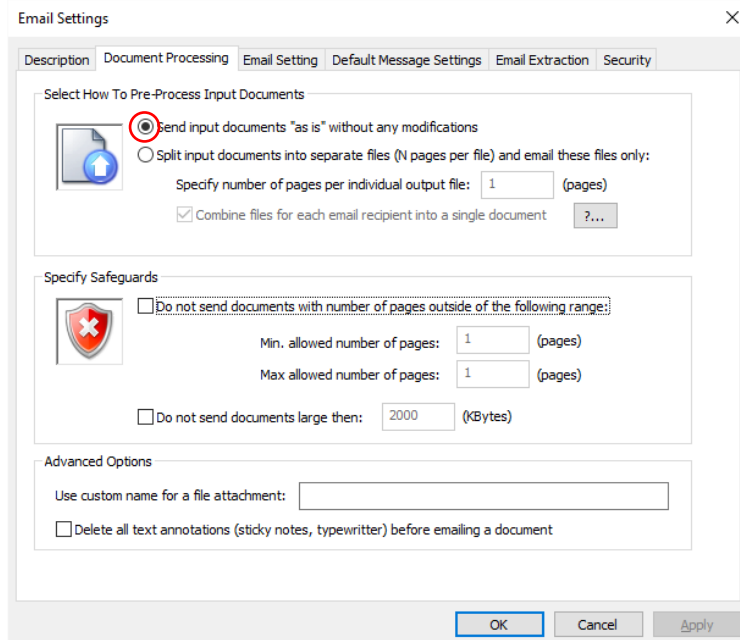
It is possible to enter one or more optional keywords separated by the | symbol. Keyword names are case-insensitive.

Click "OK" to finish entering filename-to-email mappings.

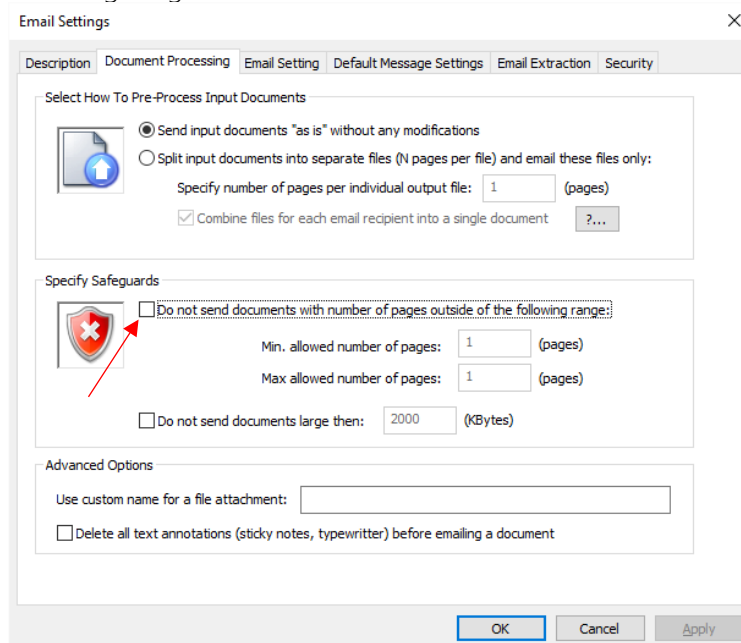
7. Click on the "Document Processing" tab:



8. Click on the circle preceding “Send input documents ‘as is’...”:

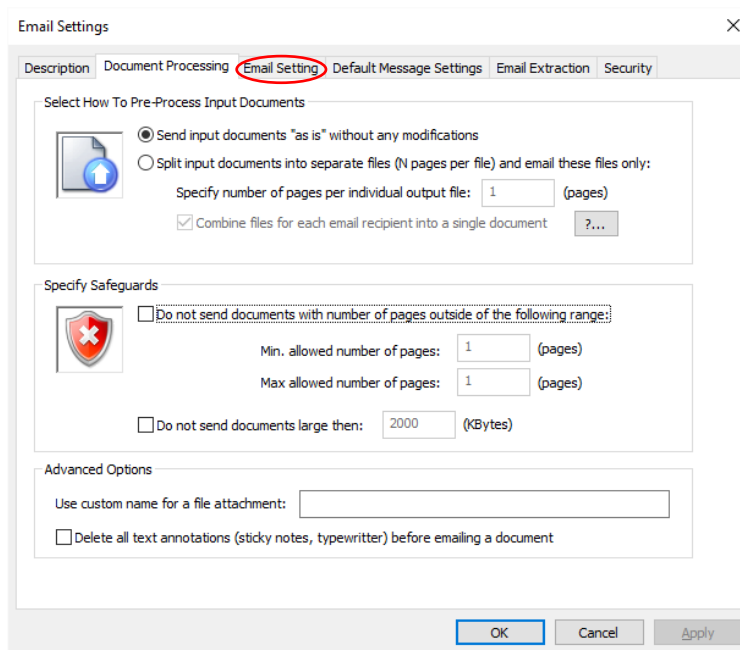


9. Make sure that the box preceding “Do not send documents with number of pages outside of the following range” is unchecked:

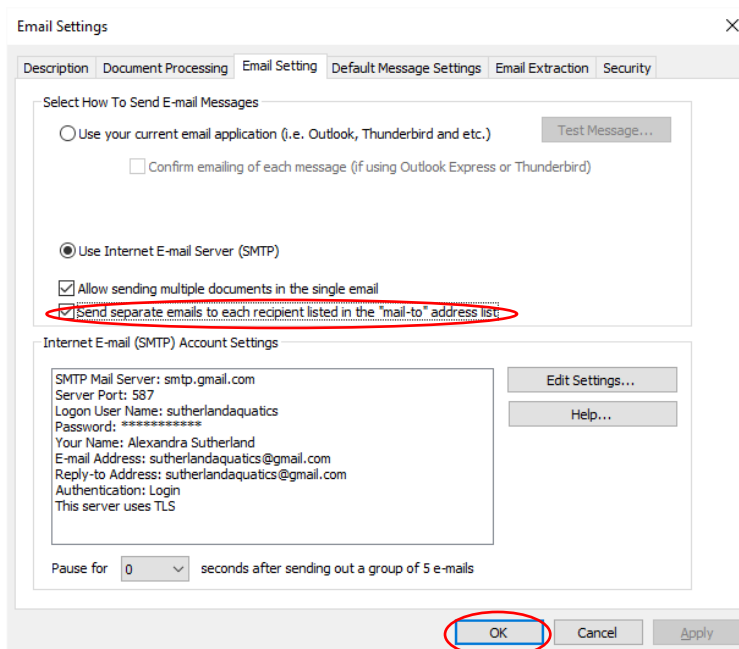


The above settings are necessary because we are sending documents based on file name to email mapping table. This means that a whole document needs to be emailed to each recipient.

10. Click on "Email Setting" tab:

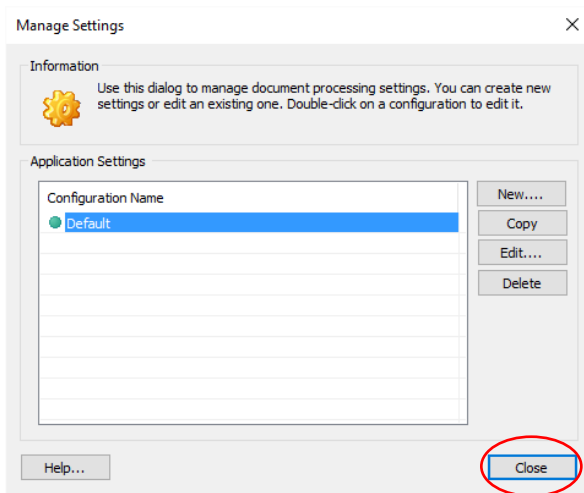


11. Click the box preceding "Send separate emails to each recipient..." to ensure that recipients who are mapped to the same filename receive separate emails:

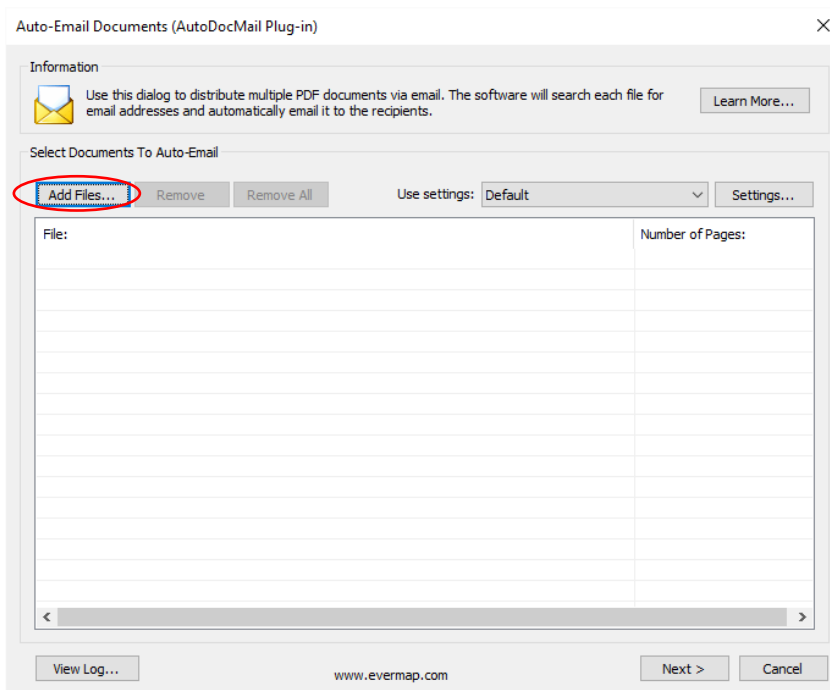


Click OK button to close settings dialog.

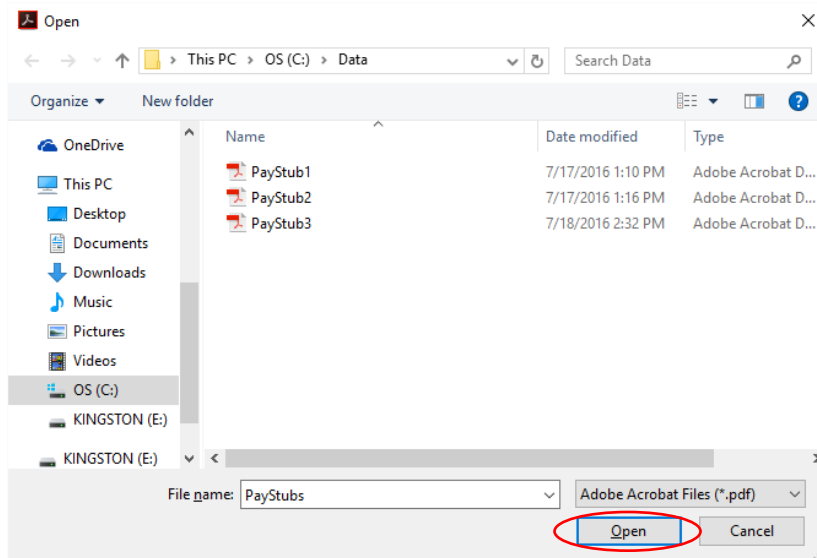
12. Click "Close" to finish settings configuration and proceed to processing your documents.



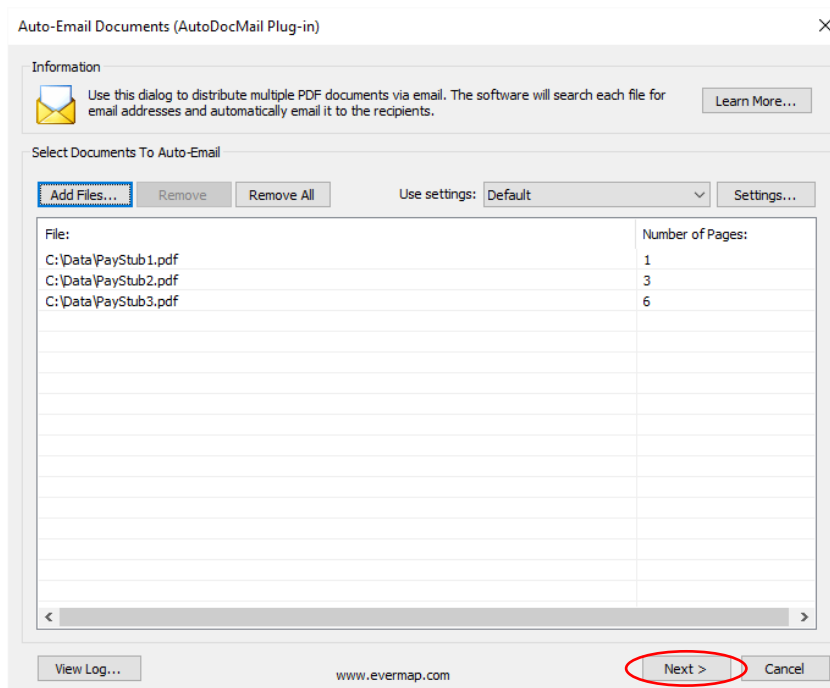
13. The "Auto-Email Documents" dialog will appear on the screen. Click the "Add Files..." button to select the source PDF file that needs to be distributed:



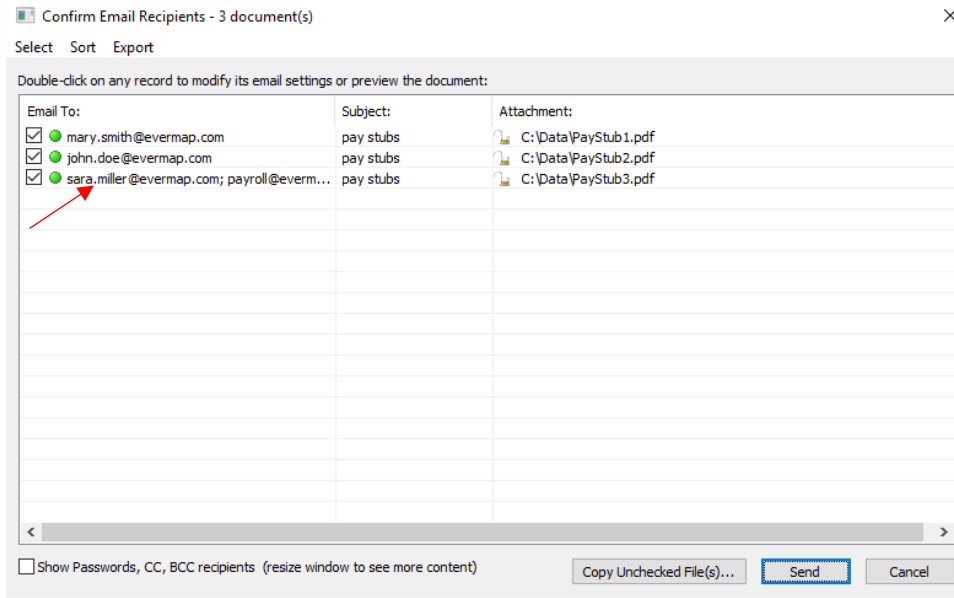
14. Select one or more input files in the "Open" dialog, then click "Open". Make sure that you are selecting files that actually exist in the file name-to-email mapping table.



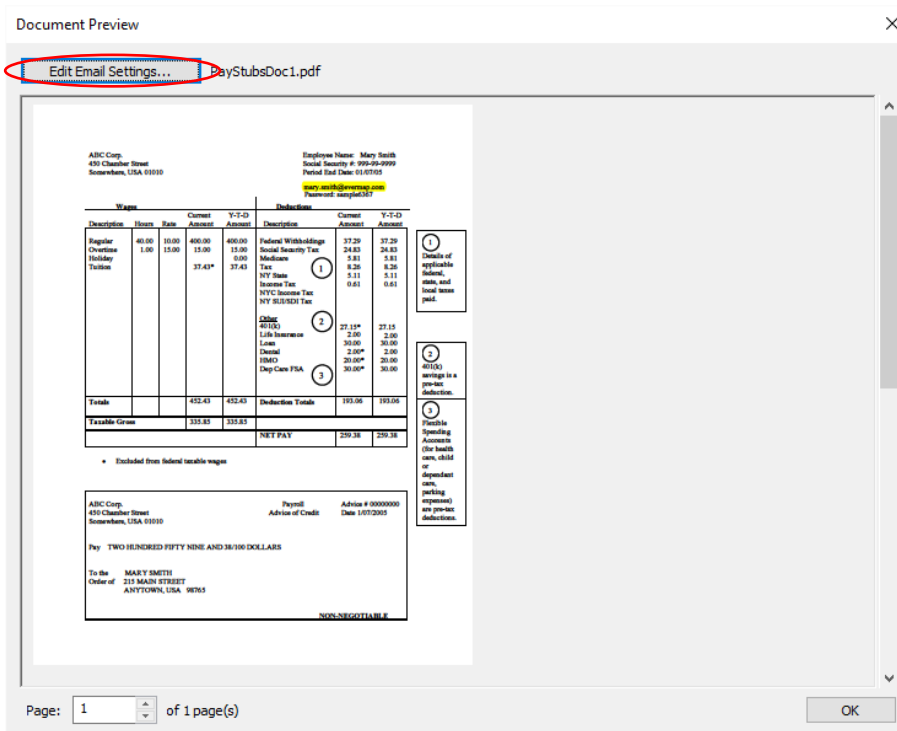
15. Click "Next >":



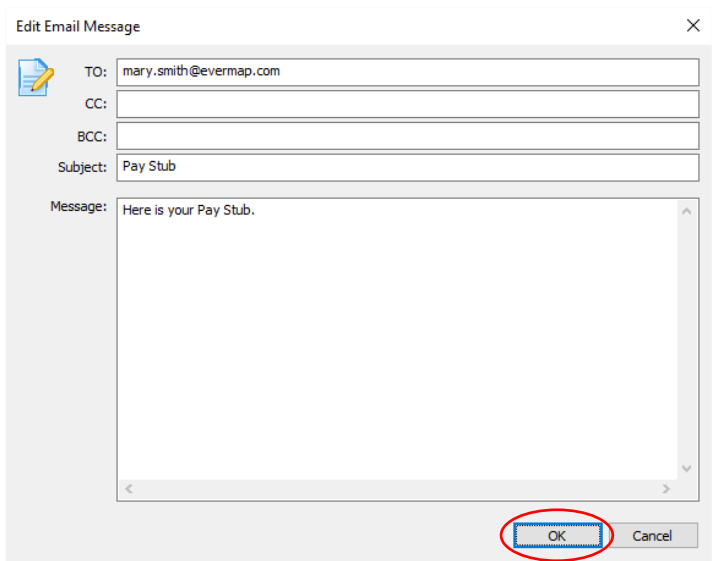
16. You will see the "Confirm Email Recipients" screen, which will list the recipients and corresponding attachments for each recipient. Each recipient's e-mail address, Subject, and Attachment for each message should be listed. Double-click on any record in the list to preview the document and/or modify the e-mail settings (this is not necessary, but recommended to verify that document is assigned to the correct recipient):



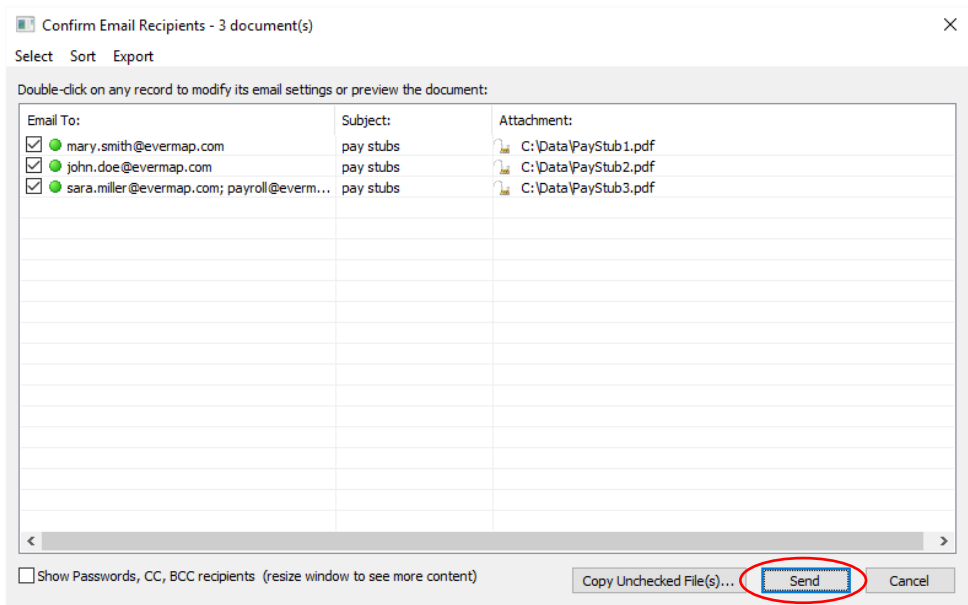
17. You can optionally review each attachment. To modify the recipients (TO, CC, BCC), Subject, and Message content of each e-mail by click on "Edit Email Settings":



18. The Subject and Message that appears in this window is the default that we defined in "Settings" at the beginning of this tutorial. You can modify all fields for each message by typing in the appropriate boxes; click "OK" when finished:

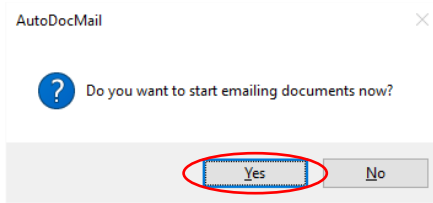


19. You can control which recipients will receive e-mails, as only those recipients with a checkmark in the box preceding their e-mail address will receive e-mails. Once you have reviewed and are satisfied with the mass-mailing arrangement, click "Send":

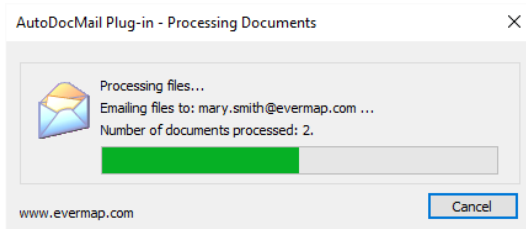


Optionally, use "Copy Unchecked Files" button to copy attachments from all unchecked emails into a separate folder for later processing or review.

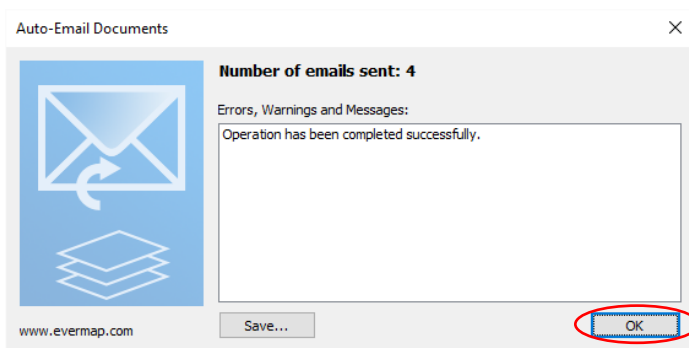
20. Click "Yes" to start emailing documents:



21. The "AutoDocMail Plug-in - Processing Documents" window will pop-up on the screen indicating the processing progress. This window will disappear once emailing of all documents is complete.



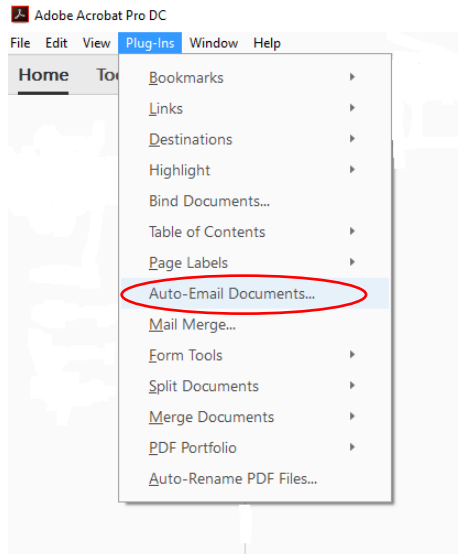
The final confirmation dialog will be shown on screen once processing is finished. It will list the total number of email sent and any warning or errors that occurred during the processing. If there are no errors, the "Operation has been completed successfully" message will appear in the window. Click "OK" to close the dialog. The processing is completed:



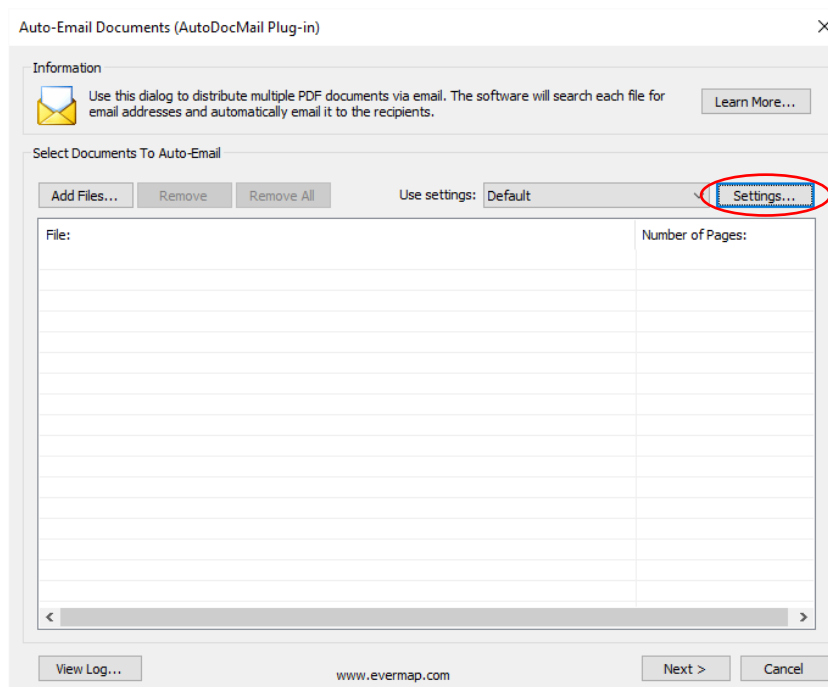
PASSWORD PROTECTING OF PROCESSING SETTINGS

It is often necessary to restrict usage of the AutoDocMail to only authorized members of staff. The AutoDocMail provides a way to password protect a specific settings configuration. The user will be required to enter a password in order to use the protected settings and actually email documents.

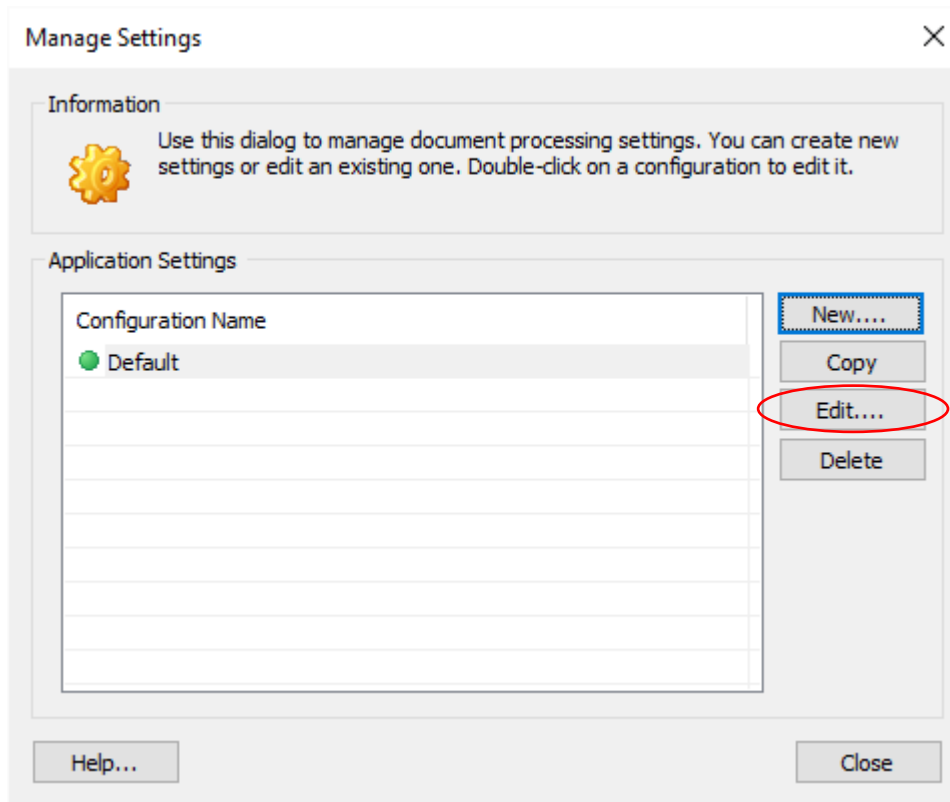
1. Open the AutoDocMail plug-in by selecting "Plug-ins > Auto-Email Documents..." from the Plug-in menu of Adobe Acrobat:



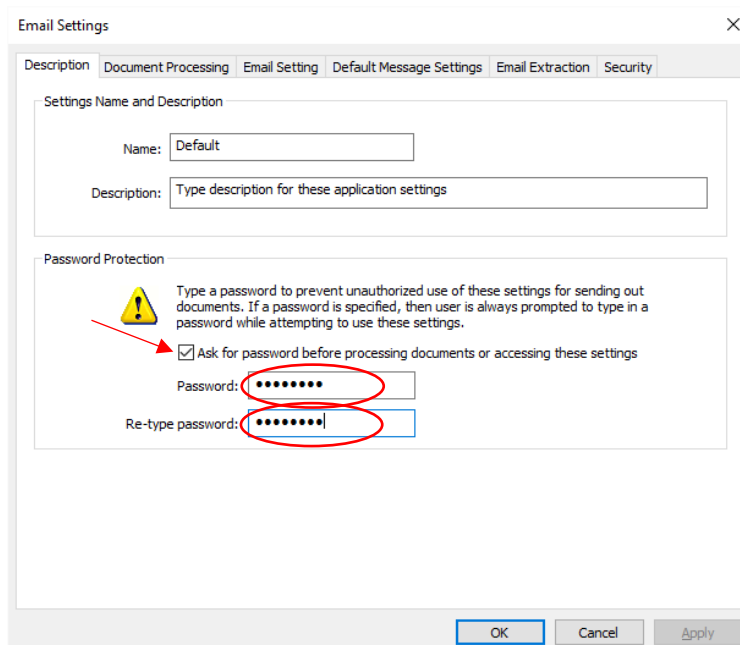
2. Click the "Settings..." button:



3. The "Manage Settings" dialog will appear on the screen. Select the settings configuration you want to edit and click the "Edit..." button.



4. Under the Description tab, click on the checkbox preceding "Ask for password before processing documents or accessing these settings". Enter a password. Re-enter the same password again.



CUSTOMIZING EMAIL MESSAGE AND SUBJECT LINE BY TEXT SEARCH

It is possible to extract a piece of text from the document's text and use it anywhere in the subject line or within a message body. Any text enclosed within **##...##** is treated as a search expression. You can use search expressions in the "Subject" and "Message" email fields only. Search expressions are using regular expression syntax and can be used to extract text patterns such as account numbers, social security numbers, email addresses and virtually any other text that contains a certain unique keyword or a pattern. A regular expression (shortened as *regex* or *regexp*) is a sequence of characters that specifies a search pattern. Usually, such patterns are used by string-searching algorithms for "find" or "find and replace" operations on strings, or for input validation. Regular expressions are used in search engines, search and replace dialogs of word processors and text editors, in text processing utilities. There are countless tutorials available online with copious examples. Here is one of the good websites: <https://www.regular-expressions.info/tutorial.html>.

Each search expression that occurs in the subject or email message body will be replaced with a matching text extracted from the document. If there is no text that matches the expression, then it will be replaced with "nothing" and essentially removed from a subject line or a message body. Search expressions using in AutoDocMail are case-sensitive.

The following example extracts the greeting line from the document and uses it to start an email message to produce a customized text that is in sync with the document being emailed:

```
##^Dear [^\n]+##,  
Please find your monthly statement for the ##account: \d{10}##.
```

The above example contains two search expressions:

- **^Dear [^\n]+** - this expression looks for the text line that starts with "Dear" and extract all text until end of the line.
- **account: \d{10}** - this expression searches for word "account:" that is followed by a space and a 10-digit number.

The above example will produce the following sample output:

```
Dear John Doe,  
Please find your monthly statement for the account: 7539539539.
```

Here is a short list of useful regular expressions (please see online tutorial for complete syntax):

\d – stands for a single digit.

\d+ - stands for one or more digits.

\w – stands for a single "word character" that is either a digit, letter or underscore.

[A-F] – matches a single letter from A to F: (A, B, C, D, E, F).

[d,.] - matches one or more digits, commas or periods. Useful for matching amounts.

\d{3}-\d{2}-\d{4} – matches a social security number (for example 123-45-6789).

\b\d{10}\b – matches a 10 digit number that is not part of any larger number

\d{4,6} – matches a number between 4 and 6 digits

SECURING PDF DOCUMENTS

Optionally, secure outgoing PDF documents with a "document open" and "user permission" passwords. Recipients will be required to enter a "document open" password in order to view its content. The content of the PDF file is going to be encrypted and cannot be read unless unlocked with a correct password. The best passwords are random and strong enough to thwart a brute force or dictionary attack. Use combination of lower and upper case letters, digits, and symbols (@, !, #, \$, %, ^, & *, !) to create strong passwords. Avoid using short passwords. The reliable password should be at least 8 characters long.

The AutoDocMail provides 4 different methods for securing outgoing documents:

1. Use a single "global password" for all outgoing documents.
2. Extract document-specific passwords from the text content using "Password" keyword (for example: password: abc123).
3. Assign document-specific passwords by using user-supplied keyword-to-password mapping table. Use this method to assign passwords based on account numbers, EINs, SSNs, phone numbers, emails and etc.
4. Extract document-specific passwords from document's metadata properties (use custom "Password" property).

The methods #2 and #3 are the most commonly used and provide a large degree of flexibility.

Use method #2 ("Password" keyword) to embed the password right into the PDF document. The AutoDocMail will automatically detect the password and use it to secure the file. The password keyword can be placed anywhere on the page, it can be hidden or printed with white font on white background to make it invisible for the user (however, it will be still possible to find it on the page).

Use method #3 (Keyword-to-Password mapping) when it is not desirable to put passwords into the PDF documents or PDF documents are already generated and it is not possible to modify them. This method allows to associate unique text or numbers with a password. For example, use this method to assign passwords based on social security or account numbers. The AutoDocMail will search each document for the user-supplied keywords (SSNs for example) and assign passwords based on the search results. This method does not require any modifications to the PDF documents and is probably the most flexible method for securing the documents.

SECURE OUTGOING DOCUMENTS WITH A PASSWORD EXTRACTED FROM TEXT

Use this method to secure each outgoing PDF document with a password that is extracted from a keyword search of the input PDF document. The recipient will need to enter their password in order to open the e-mail attachment in Adobe Acrobat or any other PDF viewer.

- You will first need to specify passwords within your input PDF document, using the "Password:" keyword. Here is the same input document that we used for our Basic Settings example. This is a multipage PDF document that contains a pay stub for a different recipient on each page. Here is the first page of the PDF document with the password within the text:

ABC Corp.
450 Chamber Street
Somewhere, USA 01010

Employee Name: Mary Smith
Social Security #: 999-99-9999
Period End Date: 01/07/05

mary.smith@evermap.com
Password: sample6367

Wages					Deductions		
Description	Hours	Rate	Current Amount	Y-T-D Amount	Description	Current Amount	Y-T-D Amount
Regular	40.00	10.00	400.00	400.00	Federal Withholdings	37.29	37.29
Overtime	1.00	15.00	15.00	15.00	Social Security Tax	24.83	24.83
Holiday				0.00	Medicare	5.81	5.81
Tuition			37.43*	37.43	Tax	8.26	8.26
					NY State	5.11	5.11
					Income Tax	0.61	0.61
					NYC Income Tax		
					NY SUI/SDI Tax		
					Other		
					401(k)	27.15*	27.15
					Life Insurance	2.00	2.00
					Loan	30.00	30.00
					Dental	2.00*	2.00
					HMO	20.00*	20.00
					Dep Care FSA	30.00*	30.00
Totals			452.43	452.43	Deduction Totals	193.06	193.06
Taxable Gross			335.85	335.85			
					NET PAY	259.38	259.38

- Excluded from federal taxable wages

ABC Corp.
450 Chamber Street
Somewhere, USA 01010

Payroll
Advice of Credit

Advice # 00000000
Date 1/07/2005

Pay TWO HUNDRED FIFTY NINE AND 38/100 DOLLARS

To the MARY SMITH
Order of 215 MAIN STREET
ANYTOWN, USA 98765

NON-NEGOTIABLE

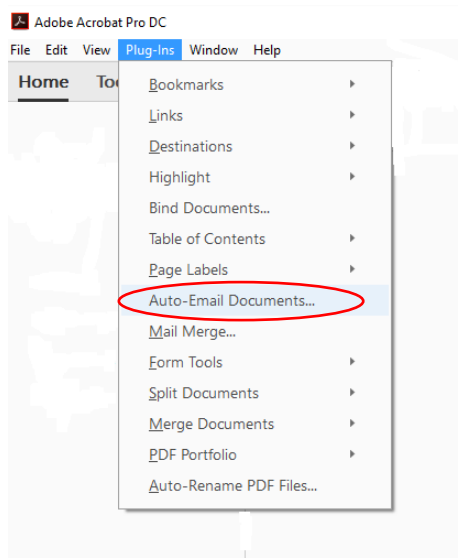
1
Details of applicable federal, state, and local taxes paid.

2
401(k) savings is a pre-tax deduction.

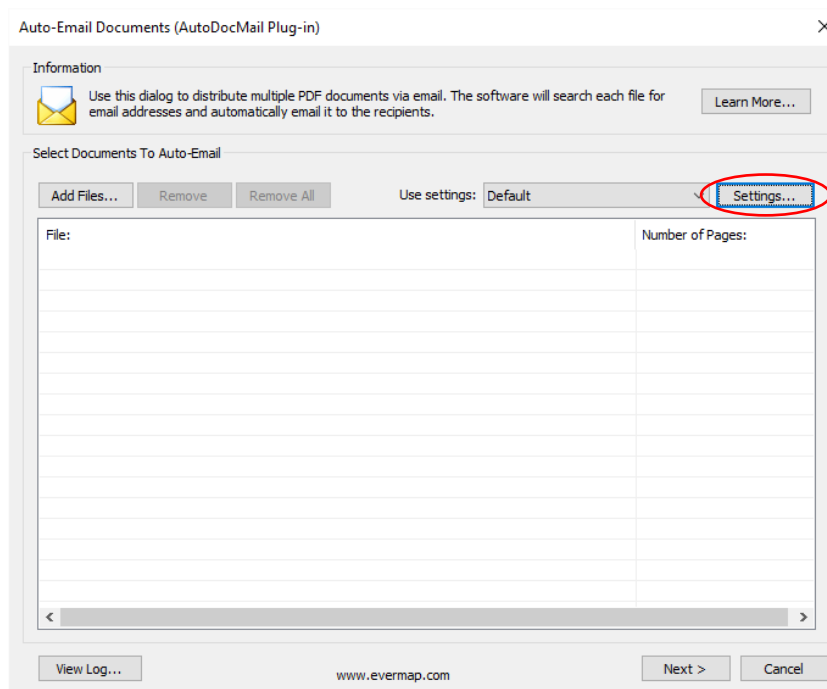
3
Flexible Spending Accounts (for health care, child or dependant care, parking expenses) are pre-tax deductions.

NOTE: The password does not have to be visible on the page. It can be printed using white font on white background or be hidden by other page elements.

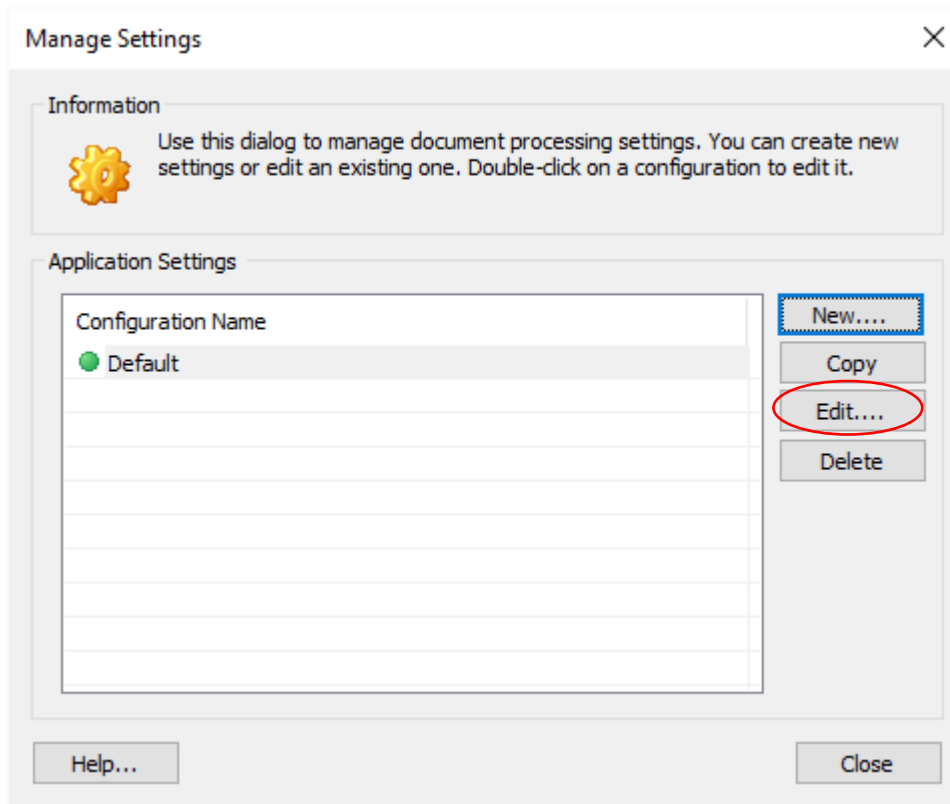
2. Open the AutoDocMail plug-in by selecting "Plug-ins > Auto-Email Documents..." from the Plug-in menu of Adobe Acrobat:



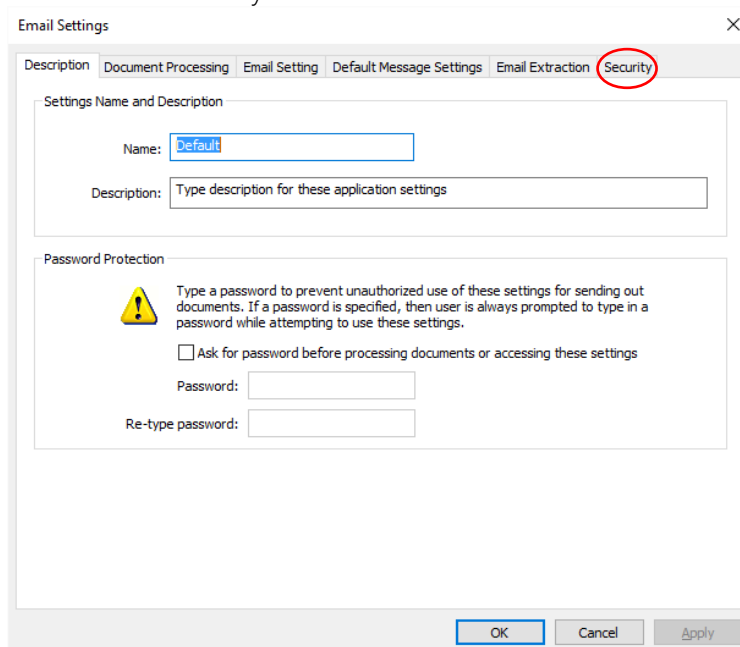
3. Click the "Settings..." button:



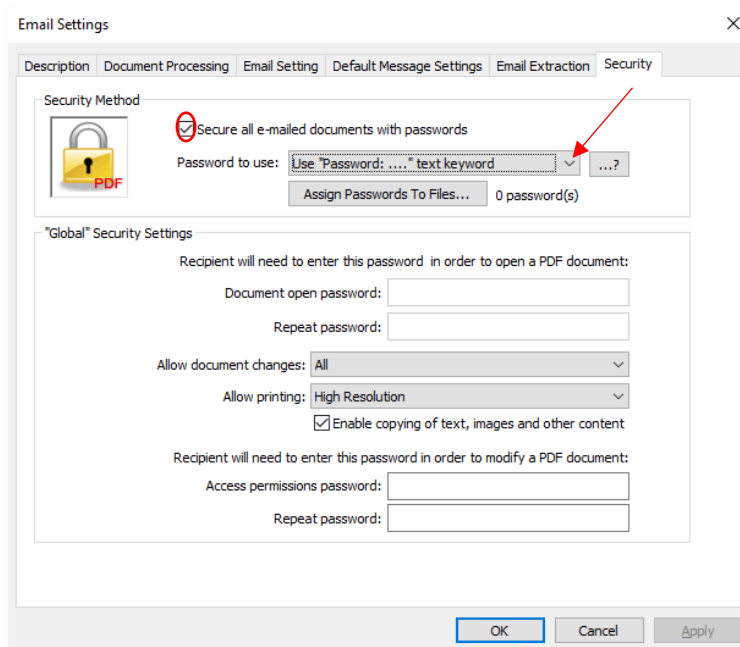
- The "Manage Settings" dialog will appear on the screen. Click the "New..." button to configure new settings, or, to edit an existing settings configuration, select the settings configuration you want to edit and click "Edit..." button:



- Click on the "Security" tab:



- Check the box preceding "Secure all e-mailed documents with passwords" and select "Use 'Password:...' text keyword" from the drop-down menu.



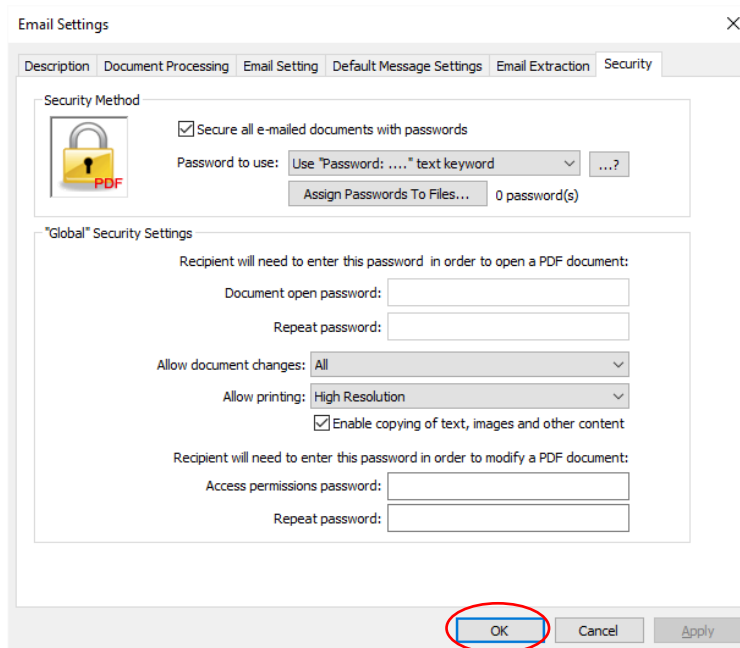
There are 3 other options available for selecting a document password:

- Using a "Global" password for all outgoing documents. Use this option to specify a single password for all documents.
- Using "Password" document property to choose a password. PDF document properties can be set via "File > Properties" dialog in Adobe Acrobat in "Custom" tab. Use this method to assign individual passwords to PDF documents without placing a password into document's text.
- Using Filename-to-Password table. Use this method to assign passwords based on the file name. Press "Assign Passwords to Files" button to enter filename-to-email mappings.

Examples of the "password" keyword usage:

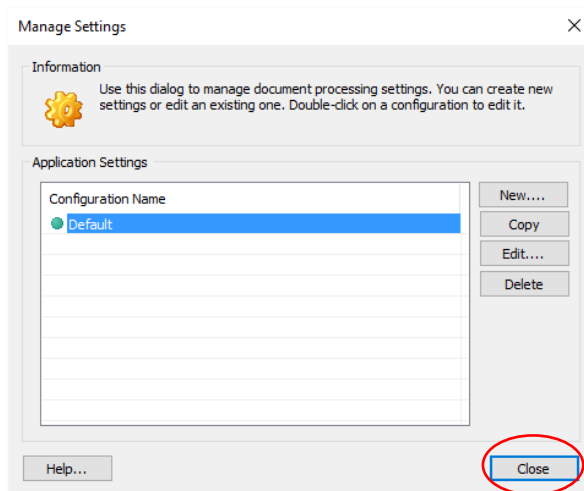
Document's Text	Password extracted
Password: sajhg32732AB	sajhg32732AB
Use password: ABC193, cc:user@myweb.com	ABC193
password: aBcDeF mailto:user@myweb.com	aBcDeF
password: 12-23_45; some text here	12-23_45

7. Click "OK" to close settings dialog:

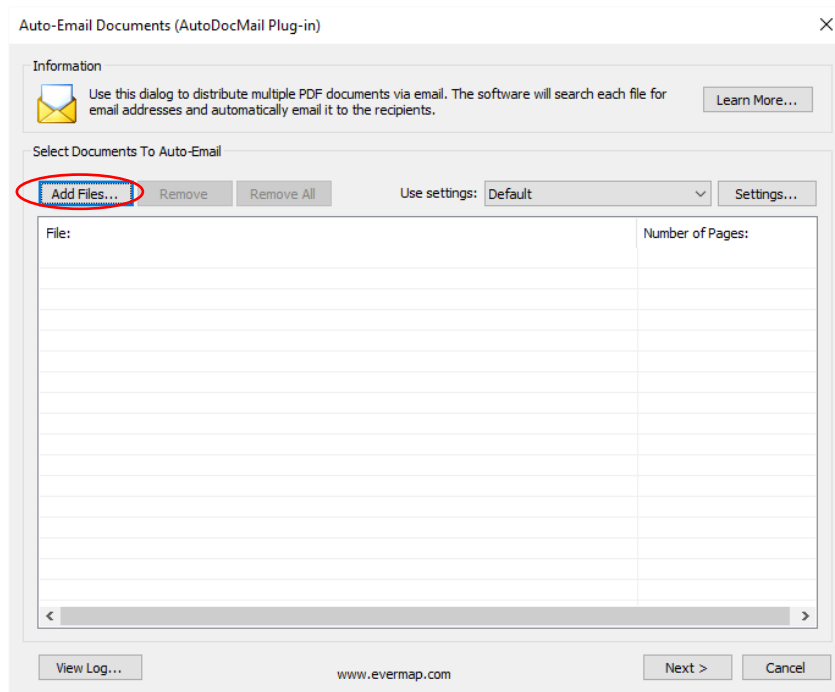


NOTE: If you need assistance with settings configuration, please see the first part of this Guide, which details basic functionality.

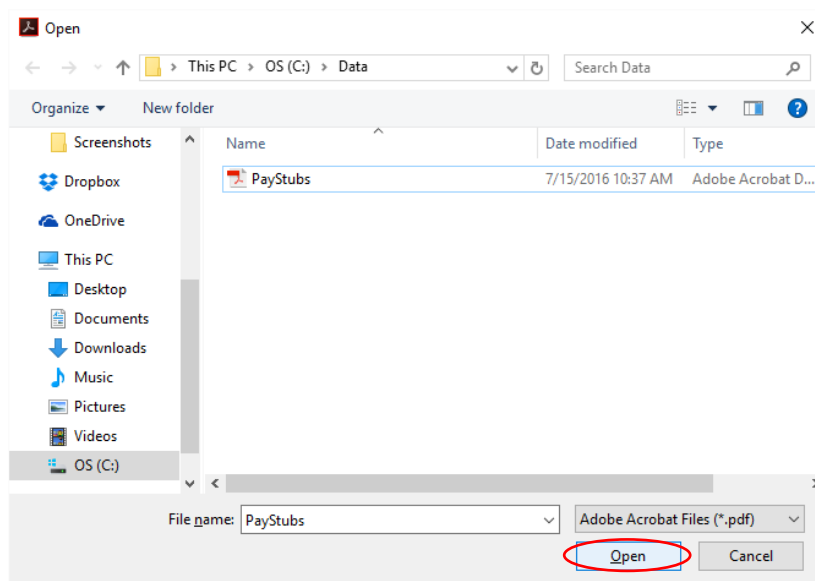
Click "Close" button to close "Manage Settings" dialog:



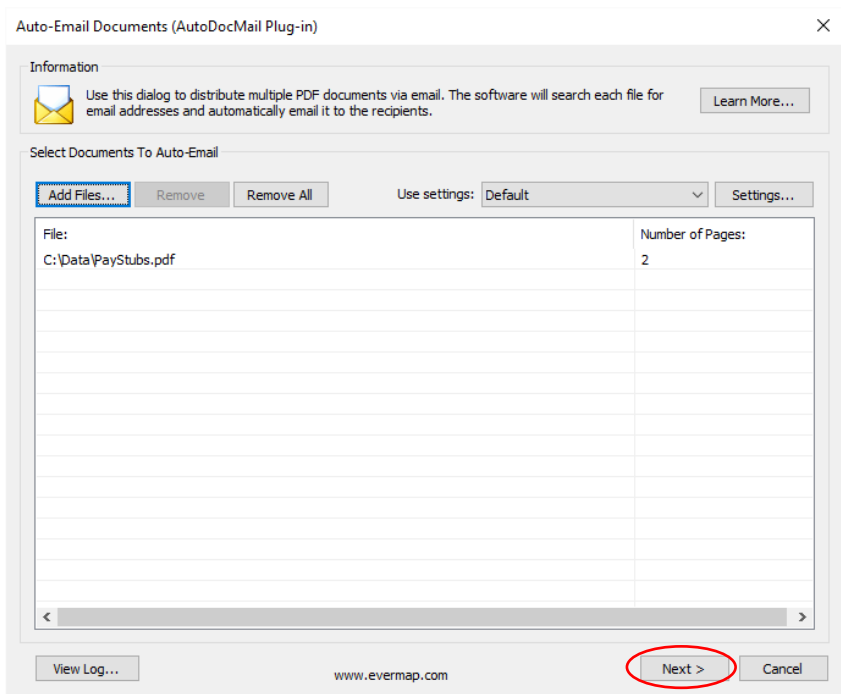
8. The "Auto-Email Documents" dialog will appear on the screen. Click the "Add Files..." button to select the source PDF file that needs to be distributed:



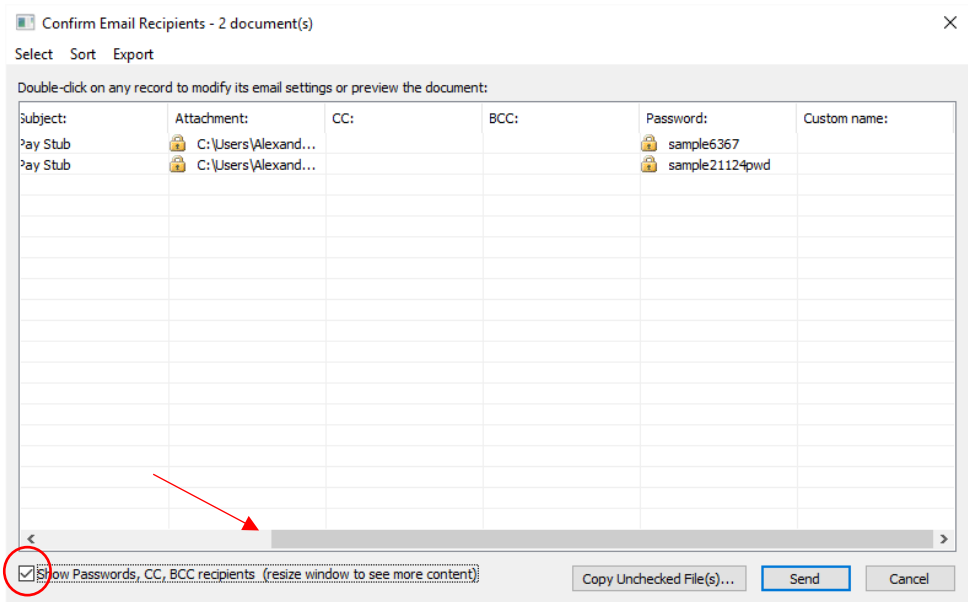
9. Select your input file (from Step 1) in the "Open" dialog, then click "Open":



10. Click "Next >".



11. Once your document is processed, you will see the "Confirm Email Recipients" screen, which will list the extracted information for each recipient. Click on the checkbox preceding "Show Passwords..." to expand the document parameters listed on the screen to display the extracted passwords. You can scroll through the parameters using the scroll bar near the bottom of the screen. You can now double-click on any record in the list to preview the document and/or modify the e-mail settings:



SECURE OUTGOING DOCUMENTS USING KEYWORD-TO-PASSWORD TABLE

This method allows to associate unique text or numbers with a password. For example, use this method to assign passwords based on social security or account numbers. The AutoDocMail will search each document for the user-supplied keywords (SSNs for example) and assign passwords based on the search results. This method does not require any modifications to the PDF documents.

You can configure passwords for this method on the "Security" tab in the "Email Settings" dialog.

1. Check "Secure all e-mailed documents with passwords" option.
2. Set "Password to use" menu to "Use Keyword-to-Password mappings" method.
3. Press "Map Keywords to Passwords..." button to open a password editor.

Email Settings [X]

Description Document Processing Email Setting Default Message Settings Email Extraction **Security**

Security Method

☒ Secure all e-mailed documents with passwords

Password to use: Use Keyword-to-Password mappings [v] ...?

Map Keywords to Passwords... 3 password(s)

Assign Passwords To Files... 0 password(s)

Encryption level: 256-bit AES (Compatible with Acrobat X and up) [v]

"Global" Security Settings

Recipient will need to enter this password in order to open a PDF document:

Document open password: [password field]

Repeat password: [password field]

Allow document changes: All [v]

Allow printing: High Resolution [v]

☒ Enable copying of text, images and other content

Recipient will need to enter this password in order to modify a PDF document:

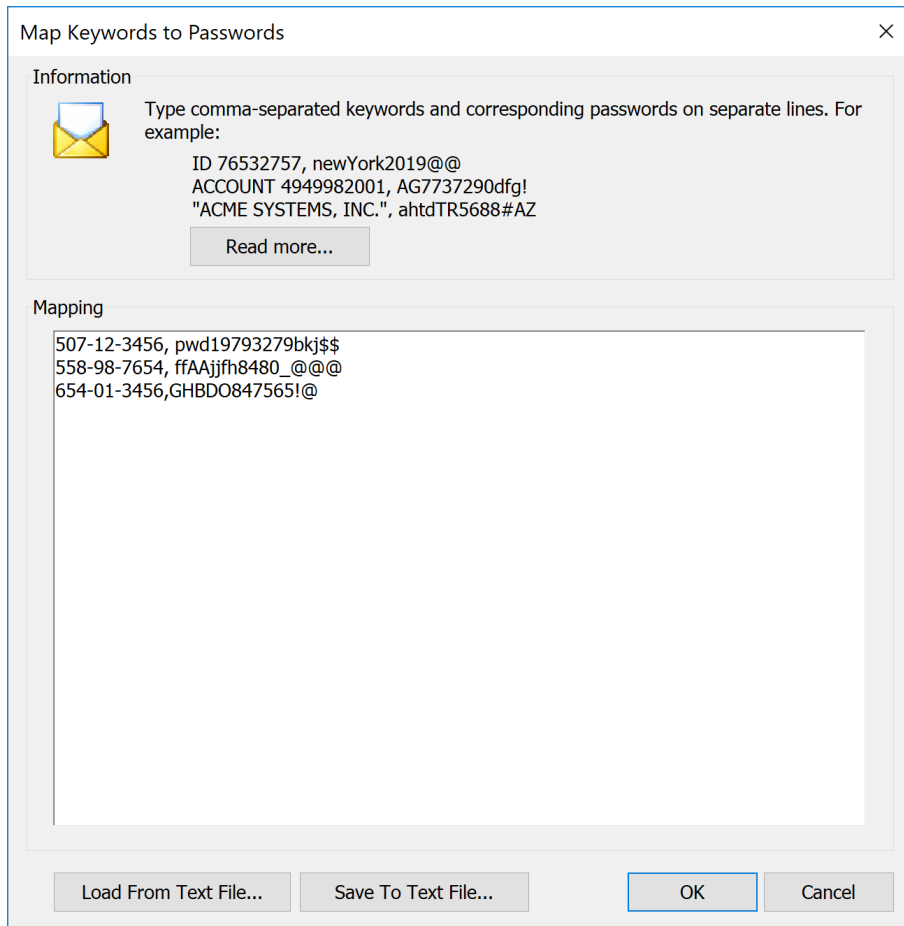
Access permissions password: [password field]

Repeat password: [password field]

OK Cancel Apply

4. Enter keywords (for example, social security or account numbers) and corresponding passwords into "Mapping" window. Separate keyword and password using comma. Do not use comma in the keyword or in the password. Each keyword-password pair should appear on a separate line. For example, type the following text to associate 3 different social security numbers with passwords:

```
507-12-3456, pwd19793279bkj$$  
558-98-7654, ffAAjjfh8480_@@@  
654-01-3456, GHBD0847565!@
```



You can save the password mapping into a text file by pressing "Save To Text File..." button. You will be prompted to select a filename and location where to save the keyword-to-password list. The keyword-to-password mappings can be loaded back from the text file by pressing "Load From Text File" button. It is possible to use other applications such as Microsoft Excel to prepare the mappings and then save the spreadsheet in CSV (comma separated values) text format. The CSV files can be read directly into AutoDocMail.

Alternatively, you can copy/paste text into the "Mapping" window by using standard Windows keyword shortcuts: use Ctrl+C to copy selected text in another text editor or application, use Ctrl+V to paste the text into the AutoDocMail.

5. Press OK button to save the mappings and continue with the rest of the settings.

AUTODOCMAIL PROCESSING KEYWORDS

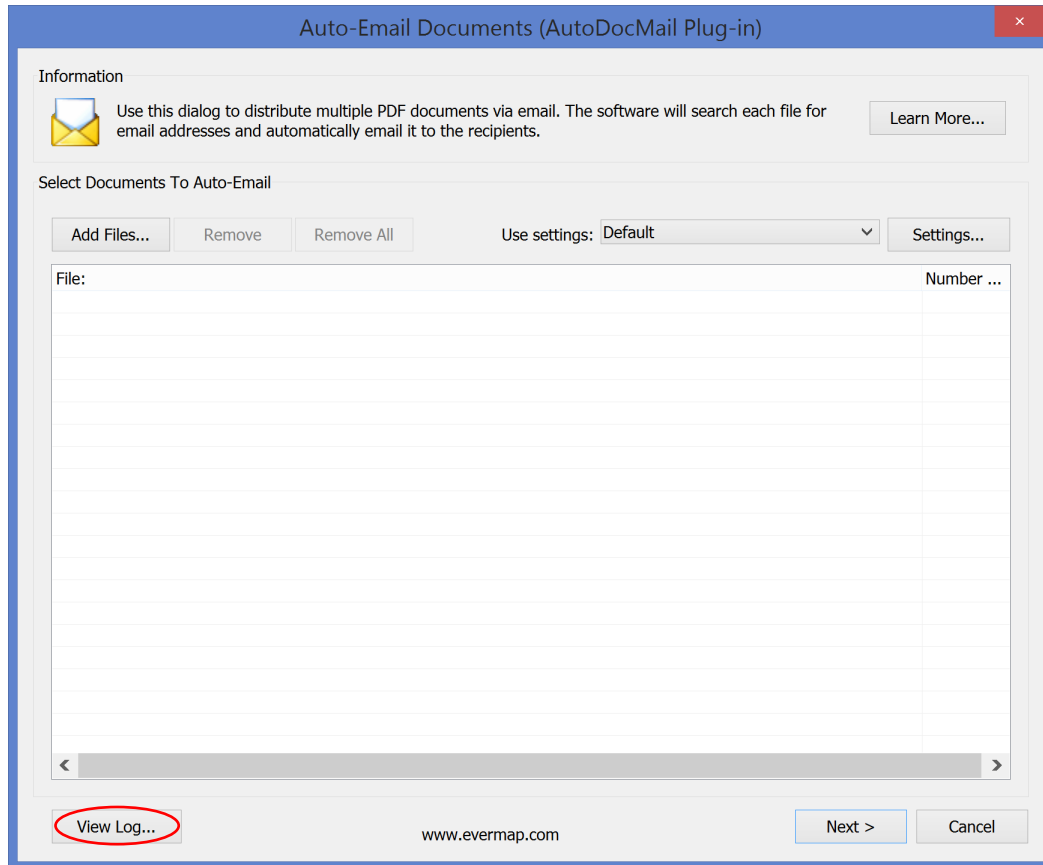
The AutoDocMail uses a number of special keywords to extract different information from PDF document's text. Here is table of keywords used:

Keyword	Usage
to:	Indicates mail-to email address. Any word that ends with to: is treated as this keyword. For example: to:john@mycompany.com
mailto:	indicates mail-to email address, for example: mailto:john@mycompany.com
mail: or email:	Indicates mail-to email address. Any word that ends with mail: is treated as this keyword. Examples: E-mail, email, mail and etc. For example: mail:john@mycompany.com or email:john@mycompany.com
from:	Indicates an email address to show on "From" field of the email. For example: from:info@mycompany.com . Overwrites the default settings
reply:	Indicates a reply-to email address to use for the current email. Overwrites the default settings. For example: reply: sales@mycompany.com
att: or attn:	Indicates mail-to email address (see the previous keyword), for example: att:john@mycompany.com
cc:	indicates CC email address, for example: cc:john@mycompany.com
bcc:	indicates BCC email address, for example: bcc:john@mycompany.com
subject:	indicates a custom email subject line, for example: subject: Newsletter
filename:	indicates a custom name for the attached document: filename: CustomName.pdf
greeting:	indicates a greeting line that should be used as a first line of the email message
password:	indicates a custom password for the attachment: Password: ABCDE12345

Please refer to software help documentation for more details. You can access documentation via "Help > Plug-in Help > AutoDocMail" menu in Adobe Acrobat or via any "Help" or "?" buttons on AutoDocMail dialogs.

TROUBLESHOOTING

The AutoDocMail maintains a processing log that lists all emails and documents processed. In case of emailing errors, detailed information can be found in the log by pressing "View Log" button located in the bottom-right corner of the main screen:



Most of the email errors are results of incorrect SMTP server configuration or due to user-permissions assigned to computer/email account by your IT department. We suggest to contact your IT department with all questions regarding email account configuration. They should be able to provide you with correct settings.

Here is an example of the processing log:

```
1: LOG STARTED: 13/7/2016 , TIME: 6:48:43
2: Number of input documents: : 2
3: Sending file : C:\Users\Admin\AppData\Roaming\EverMap\AutoDocMail\TempFiles\Copies\PayStubSampleDoc1.pdf to
mary.smith@evermap.com via MAPI EX
4: Time: 07/15/16 08:13:27, File C:\Users\Admin\AppData\Roaming\EverMap\AutoDocMail\TempFiles\PayStubSampleDoc1.pdf has been
emailed TO: mary.smith@evermap.com, CC: , BCC: , Subject: Enter Email Subject
5: Sending file : C:\Users\Admin\AppData\Roaming\EverMap\AutoDocMail\TempFiles\Copies\PayStubSampleDoc2.pdf to
john.doe@evermap.com via MAPI EX
6: Time: 07/15/16 08:13:27, File C:\Users\Admin\AppData\Roaming\EverMap\AutoDocMail\TempFiles\PayStubSampleDoc2.pdf has been
emailed TO: john.doe@evermap.com, CC: , BCC: , Subject: Enter Email Subject
7: Number of emails sent : 2
8: Number of documents failed or skipped : 0
9: LOG STOPPED: 17/7/2016 , TIME: 9:16:15
```