



AutoMail

User Guide

AutoMail v 3
Revision 8 (for v3.3)

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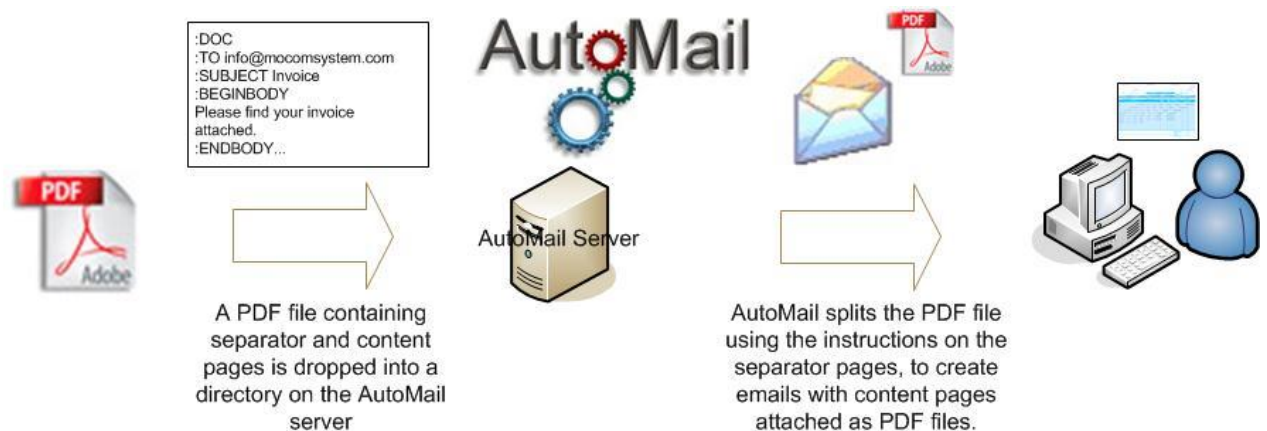
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AutoMail Description

Overview



Mocom AutoMail is an email automation system that takes a single source PDF file (e.g. from Crystal Reports) containing separator and content pages and uses it to create emails with the content pages attached. For example an invoice report can be generated in Crystal Reports with multiple invoices separated by pages containing the details of the who the invoices are to be sent to. AutoMail enables rapid deployment of email facilities for existing applications.

AutoMail runs as a Windows service that monitors a specified directory for PDF files that provide instructions for the creation and sending of emails. When a PDF file is created in the monitored folder, AutoMail reads through the file and picks out commands on the separator pages. These commands instruct AutoMail on the creation of the address, subject, body and additional attachments of an email. The pages in-between the separator pages are the actual content that is to be split into PDF files that are then attached to the email.

AutoMail can also be used as a text to email system. Simple text files containing commands, content text, and paths to attachments can be dropped in a monitored directory. AutoMail will take these text files and use them to create and send emails.

An additional option to AutoMail also allows jobs to be printed or faxed using commands on the separator page.

Installing Mocom AutoMail

Prerequisites

DUE TO CHANGES IN THE INSTALLER, PLEASE UNINSTALL ANY VERSION PRIOR TO 3.0.1 BEFORE YOU INSTALL THE LATEST VERSION.

AutoMail User

If the directory to be monitored for incoming script files is not a local directory, then you will need to create a network user with permissions to logon locally and logon as a service to the machine that you are installing AutoMail. This user will also need permissions to access the folder where script files are dropped and to have full control over the root directory, and log directory that you specify in the installation procedure.

Mail Relay

Confirm that the SMTP server that AutoMail is configured to use, allows relaying of messages from the AutoMail user created above, or from the IP address of the AutoMail server.

.Net Framework

Mocom AutoMail is built upon the Microsoft .Net Framework 4.0. To install AutoMail you need to install the .Net Framework, which can be downloaded from the Microsoft web site.

Updates

It is recommended that you ensure the server on which you are installing AutoMail has the latest Service Packs and Framework Updates installed.

Anti-Virus

Disable Anti-Virus on access\read\write scanning, or exclude the AutoMail directories. AutoMail has to make rapid changes to script files, and on access scanning on slower machines can cause files to be locked.

License

Mocom AutoMail needs a valid annually renewable license to run. Without a license AutoMail will run as a 30 day trial with a watermark being added to every PDF and email. To obtain a valid license please contact support@mocomsystems.com

64-Bit

If you are running AutoMail on a 64bit operating system, then you will need to use the x64 version of setup.

Upgrading from version 2.0

PDF Scripting

Please note that AutoMail version 3.0 no longer provides for the creation of PDF files using the old scripting method. There is a new separate service that can be installed to provide this legacy functionality. If you require this functionality then please keep your existing version installed and contact Mocom Systems for further details.

Changes to Default

- HTML email is now the default format for email
- If an error occurs with the commands for a particular job within a PDF batch file (e.g. invalid email address), then the default is to now continue processing the rest of the batch file and to send an error message regarding any failed jobs.

Changes to File Locations

Files are now stored in a “Data” directory in the installation folder. The first time that AutoMail Monitor is run, it will check to see if the old file structure exists and will ask if you would like to move the files. We recommend that you accept this and move everything to the new location.

New PDF Parser

AutoMail 3 contains a new PDF parser which is much more accurate and now supports PDF files generated from most sources. In addition PDF commands no longer need to be in fixed space font.

While this new parser is a great improvement, we do recommend that you thoroughly test AutoMail 3 with your generated PDF files

Licensing

AutoMail 3 has a new annual licensing system, and a service is installed to keep your licence up-to-date (once the initial licence has been added in the settings). If your server does not have access to the internet then you will need to manually update your licence.

New feature and fixes

AutoMail 3 contains many new features and improvements that are documented in this manual.

For a full list of all new features, changes and fixes for the current version please see the changelog.txt file in the installation directory.

Setup Wizard

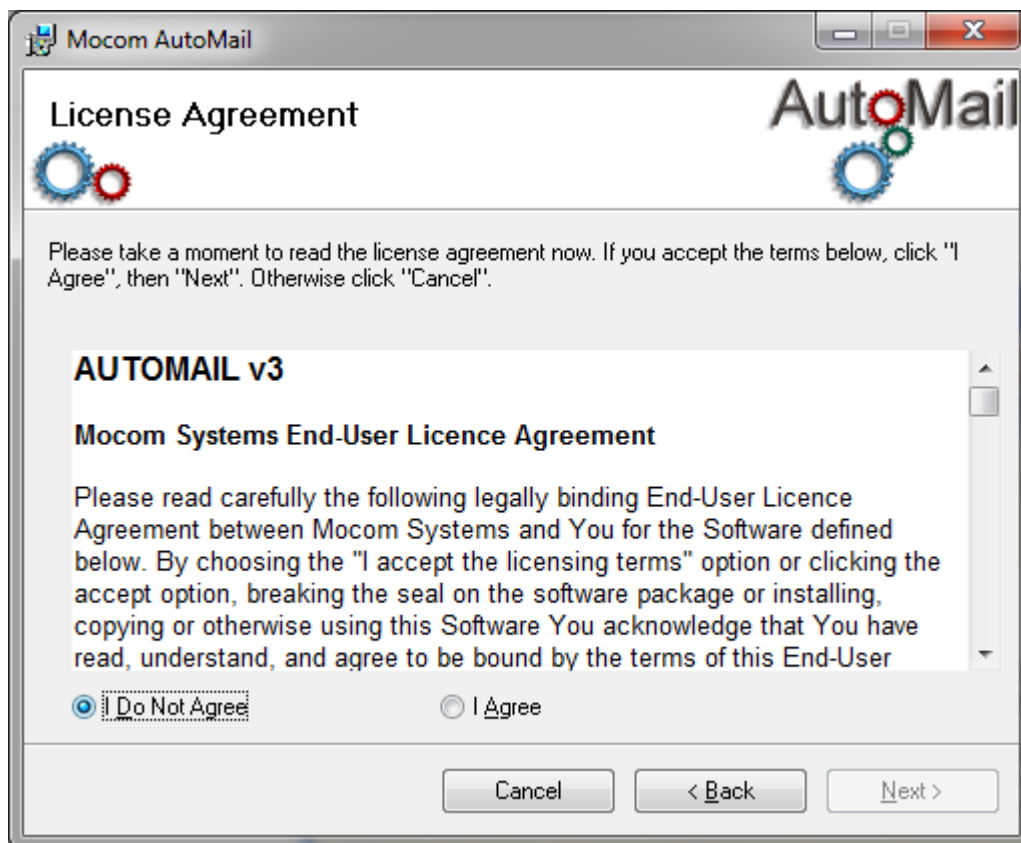
Logon to the server as a user who has local administrator rights.
To start the setup wizard, click on the 'Setup.exe' file.

Welcome Screen



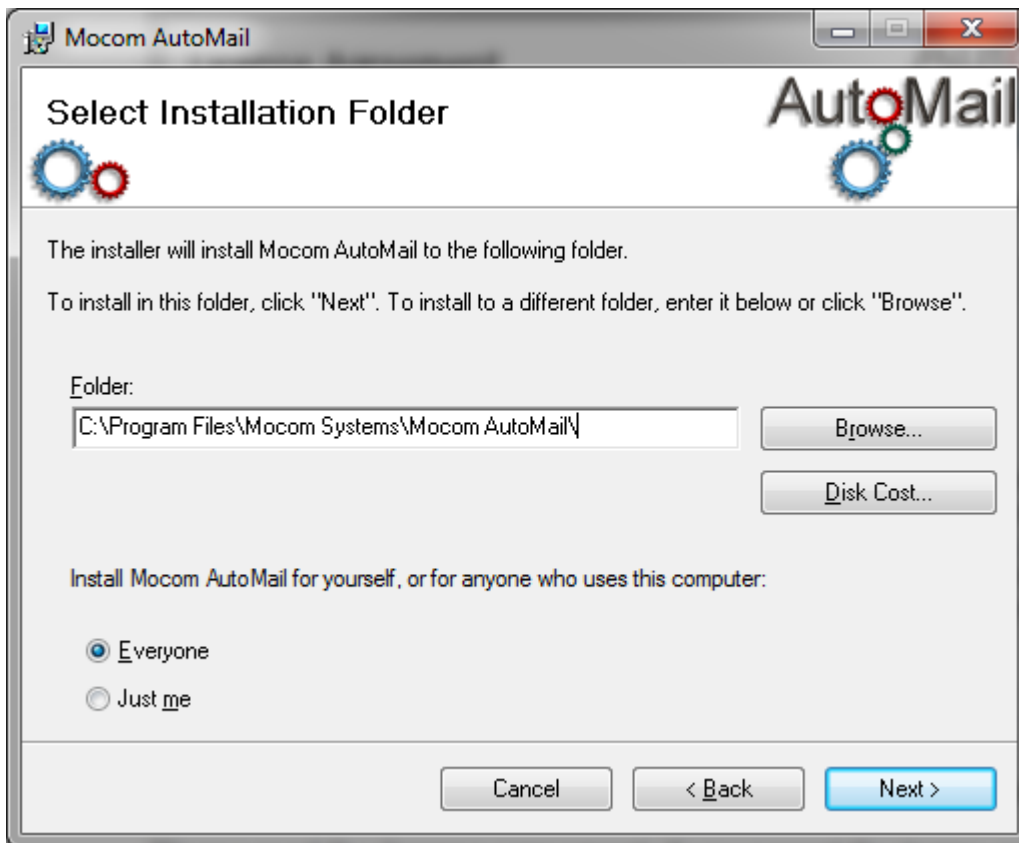
Click Next to progress.

License agreement



Please read the license agreement, if you accept the terms and conditions then choose 'I Agree', and click Next.

Installation Folder



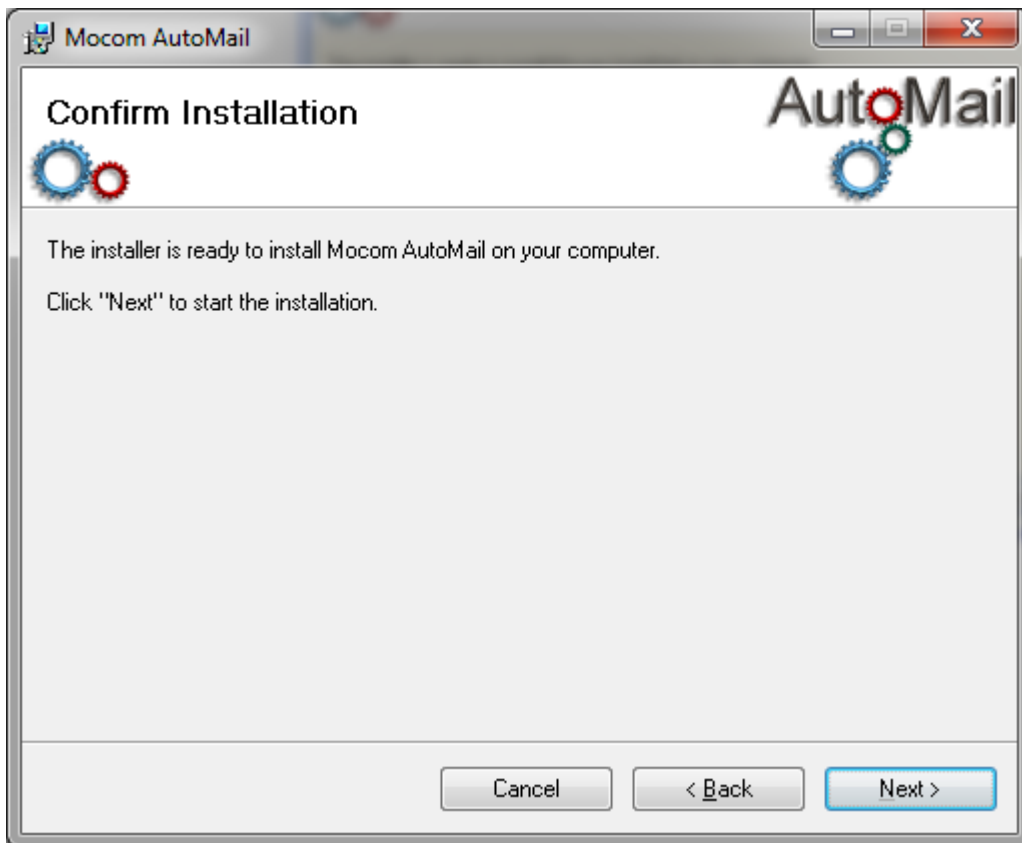
Select a suitable folder for AutoMail to be installed to.

NOTE:

It is recommended that you leave the folder to install to the default location.

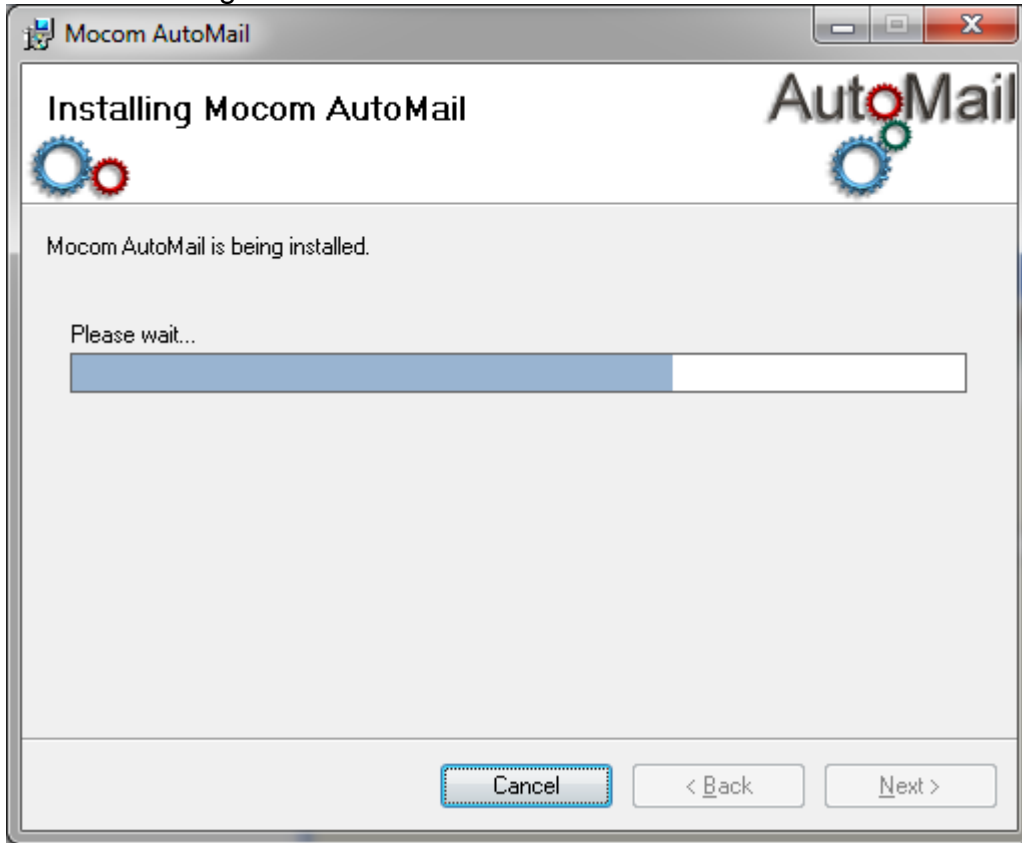
Click Next.

Confirm File Installation



Click Next to begin the file installation.

Installation Progress



A progress bar is displayed to show progress of installation.

Installation Complete

Once installation has completed, click close.

License

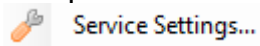
To run AutoMail you need a valid license file. To obtain a license you need to contact support@mocomsystems.com. The license needs to be entered into the Licence tab of the AutoMail settings program.

Starting and Configuring AutoMail

Opening the Settings Dialogue Box

The settings program is available through "AutoMail Monitor":
Start > All Programs> Mocom Systems > AutoMail > AutoMail Monitor.

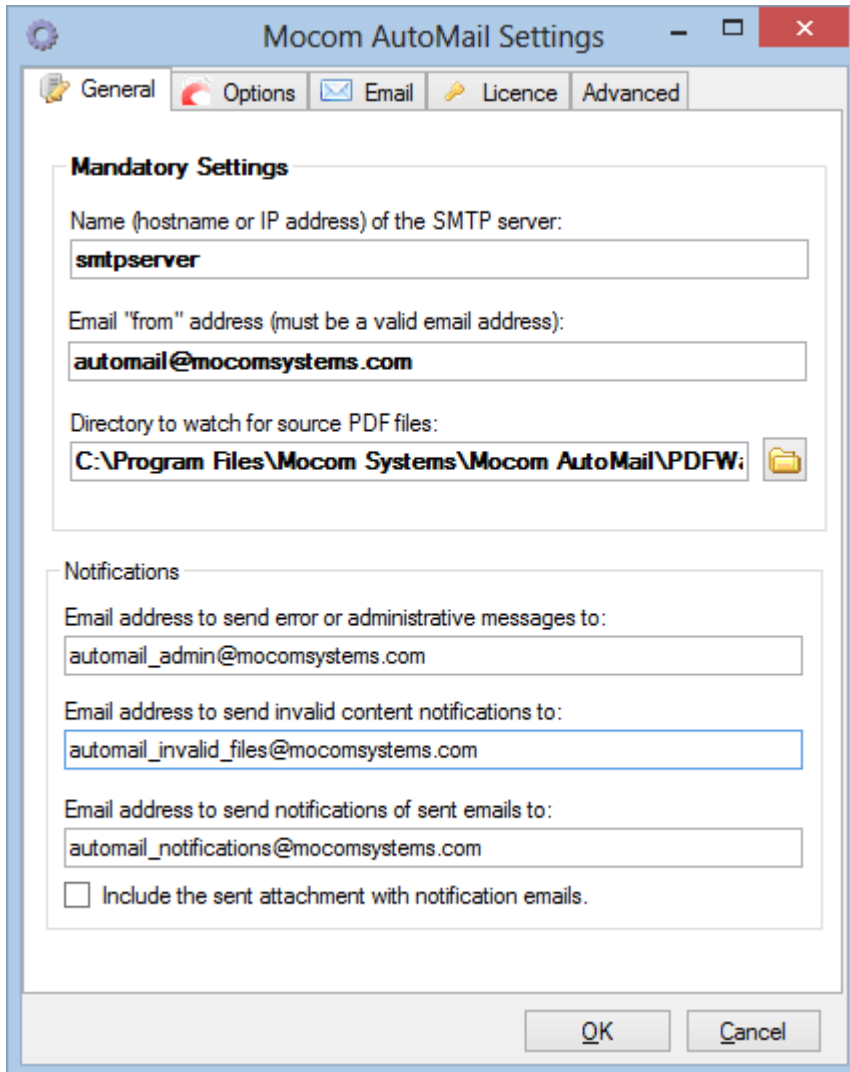
To open the Settings dialogue click on the "Tools" menu and select



Most settings configured within the settings tool can be overridden on a per job basis using commands in the Job Header.

General Tab

Enter the settings to be used by the AutoMail service. As a minimum you need to enter the From, SMTP Server and Watch Directory fields.



The screenshot shows the 'Mocom AutoMail Settings' dialog box with the 'General' tab selected. The 'Mandatory Settings' section contains three text input fields: 'Name (hostname or IP address) of the SMTP server:' with the value 'smtpserver', 'Email "from" address (must be a valid email address):' with the value 'automail@mocomsystems.com', and 'Directory to watch for source PDF files:' with the value 'C:\Program Files\Mocom Systems\Mocom AutoMail\PDFW;' and a folder icon. The 'Notifications' section contains three text input fields: 'Email address to send error or administrative messages to:' with the value 'automail_admin@mocomsystems.com', 'Email address to send invalid content notifications to:' with the value 'automail_invalid_files@mocomsystems.com', and 'Email address to send notifications of sent emails to:' with the value 'automail_notifications@mocomsystems.com'. There is also an unchecked checkbox labeled 'Include the sent attachment with notification emails.' At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Name (hostname or IP address) of the SMTP server: The SMTP (email) server that AutoMail will submit emails to for sending. If you want to set advanced options (TLS, User details etc) then these can be set under the "Email Options" tab.

Email "from" address (must be a valid email address): This is the "from" address that appears in sent emails. If you are using SMTP authentication (under email options tab) the user specified must be allowed to send from this address. We recommend that this is a valid email address that goes to a monitored mailbox, so that any delivery errors or receipts can be read.

Directory to watch for source PDF files: The directory to be watched for dropped PDF source files (e.g. from Crystal Reports).

Email address to send error or administrative messages to: This is the e-mail address where any error messages (e.g. incorrect scripts) or administrative alerts (e.g. licence expiry) generated by AutoMail, are sent to.

Multiple addresses need to be separated with a semicolon and a space e.g. n1@mocom.co.uk; n2@mocom.co.uk

Email address to send invalid content notifications: Add an email address if you require that batch job processing errors get sent to a different address to general error messages. E.g. if you have an operator who submits batch files to AutoMail and you want them to get notified if there is an invalid/missing :TO address in the submitted batch file. Any other messages (e.g. server issues) will go to the normal error email.

This can also be set on a per batch basis using the :BATCHERROREMAIL command (see later chapter on AutoMail commands).

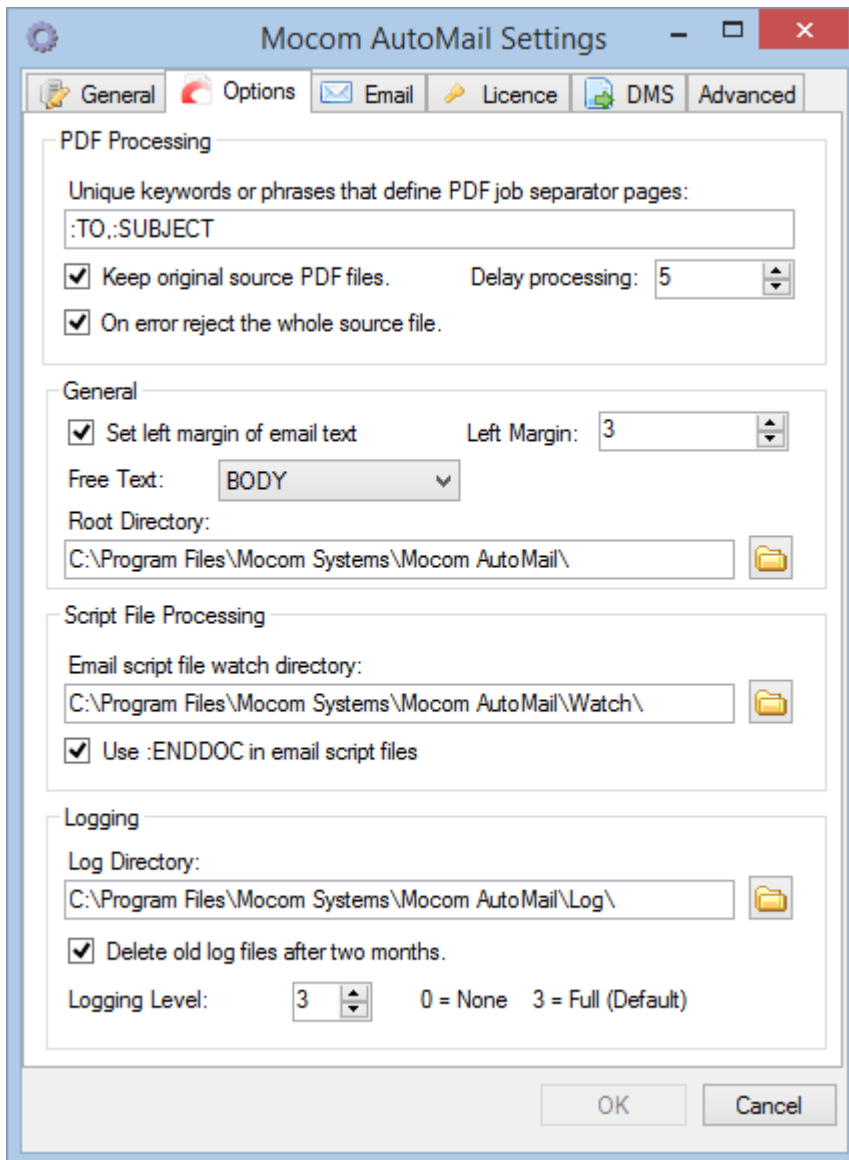
Multiple addresses need to be separated with a semicolon and a space e.g. n1@mocom.co.uk; n2@mocom.co.uk

Email address to send notifications of sent emails: This is the email address that AutoMail will send messages confirming that an email has been sent to the SMTP server. Leave blank if you do not require these messages. Multiple addresses need to be separated with a semicolon and a space e.g. n1@mocom.co.uk; n2@mocom.co.uk

NOTE: A notify message does not confirm that a message has been received by the addressee, only that AutoMail has successfully delivered the message to the SMTP server.

Include sent attachment with notification emails: If this option is enabled then any notification emails will include the attachments that were sent with the original email.

Options Tab



PDF Job Separator: This is a snippet of unique text that appears on every page that separates the jobs in the PDF report file.
e.g. In a report PDF containing multiple invoices to send to customers, the separator file would include at least an AutoMail :TO and :SUBJECT commands. These two commands will not appear on the actual invoices, so they can be used as phrases to define which page is a Job Separator.

Separate each phrase with a comma. e.g. :TO, :SUBJECT

We recommend that the number of phrases be kept to a minimum and only use words which are guaranteed to always appear only on separator pages. If you are worried about invoice pages getting wrongly tagged as separator pages or separator pages getting missed then use the :REFTAG command (see later sections).

Keep original source PDF files: This option keeps a copy of the original source PDF file. If this option is unticked then the file is deleted once it has been successfully processed.

Delay Processing: The time in seconds before a new PDF source file will be processed.

When a source file is created in the PDF watch directory it can take a while before the program that is creating it (e.g. Crystal Reports) completes writing to it. This delay allows time for the file to be written before AutoMail starts to process it. The default time is 10 seconds and we recommend that you leave it at this unless you are having problems with AutoMail not being able to access files.

On error reject whole source file: If the source PDF file contains multiple jobs, but one or more has an error (e.g. invalid email address) then if this option is checked, the whole source file is rejected and an error is created. Note: From AutoMail 3.0.4 onwards the whole source batch file is always parsed, and a list of all issues with the source file is sent in the error message.

If unchecked then all valid jobs will be processed, and error messages will be created for each failed job.

Set left margin of email text: This settings moves the default margin of the email text to the value in the Left Margin box. This is useful if you need to indent the body text of an email.

Left Margin: The number in spaces to indent the left margin.

Free Text: This sets the default action for text in a script file that is not part of a command.

Example: :TO support@mocomsystems.com
:SUBJECT Test Message
This is free text.
:ENC c:\temp\file.txt
This is also free text and will be appended.

Example: :TO support@mocomsystems.com
:SUBJECT Test Message
:BEGINBODY
This is not free text as it is enclosed by body statements
:ENDBODY

Options:

IGNORE - Text in body is ignored. (Default)

BODY - Text in script is used in the message body.

Root Directory: Points to the directory where AutoMail will create data files,

attachments, error files etc. This can get quite large as it is where the source PDF files and separated attachment are stored.

Email Script File Watch Directory: Directory that AutoMail monitors for new ".mes" email script files.

Use ENDDOC in email script files: (*This is only used with dropping text files directly in the AutoMail watch directory, and not with PDF source files*). Enabling this option (recommended) causes AutoMail to enforce the use of the :ENDDOC command in email ".mes" script files.

The :ENDDOC command tells AutoMail that a script has reached the end. Enforcing this command helps prevent corrupted scripts from sending unfinished emails.

Log Directory: Points to the directory that will store the daily log files.

Delete old log files: AutoMail will automatically delete old log files after 2 months if this option is selected.

Logging Level: This sets the level of detail written to the log file. The higher the number the more detailed the logs.

Email Options Tab

The screenshot shows the 'Mocom AutoMail Settings' dialog box with the 'Email' tab selected. The 'SMTP Options' section includes a 'SMTP Port' dropdown set to '25' and a 'Test SMTP' button. Below are checkboxes for 'Use SMTP TLS' and 'Use SMTP Authentication'. The 'SMTP Authentication' section contains text boxes for 'SMTP UserName' and 'SMTP Password'. The 'Email Format' section has checkboxes for 'Use HTML Body' (checked) and 'Use Default HTML Template (default.tpl file required)'. The 'Email Options' section includes checkboxes for 'Group multiple attachments in a single email to recipient.' (checked) and 'Request an email delivery notification with sent messages.', along with a 'Number of hours to retry sending failed emails to server:' dropdown set to '72'. 'OK' and 'Cancel' buttons are at the bottom.

SMTP Port: This should be set to the port that your SMTP server is listening on. The default is 25.

Test SMTP: This will send a test email using the current settings you have entered in the settings form.

Use SMTP TLS: Select this option if you want AutoMail to communicate with the SMTP server using the encrypted TLS protocol (the email server must support TLS).

Use SMTP Authentication: Authenticate with the SMTP server using Basic Authentication using the username and password entered in the boxes below.

SMTP UserName: The username used to authenticate with the SMTP server.

SMTP Password: The password used for authentication with the SMTP server.

Use HTML Body: Ticking this option will send emails in HTML format instead of PlainTxt. NOTE: AutoMail will try to detect any HTML tags in the body text of the email. If it doesn't detect tags it will assume that the text is "plain text" and will automatically replace any line breaks with
 so that line breaks will appear correctly in HTML.

Use Default HTML Template: If this option is selected then AutoMail will look for a 'default.tpl' file in the "resources" folder (by default folder this is "C:\Program Files\Mocom Systems\Mocom AutoMail\Resources"). If a default.tpl file is found then the contents will be used to create the HTML email. See section on HTML Email Templates for further details.

Group multiple attachments in a single email to recipient: If a source PDF file contains multiple emails to the same recipient then all the attachments will be grouped together and sent as one email, rather than lots of individual emails.

NOTE: If attachments are grouped by recipient, then the email contents will be created from the contents (body, variables, template etc.) of the first job separator.

Request an email delivery notification with sent messages: Enabling this option will request a delivery receipt from the recipient's server to be sent back to the "From" address. **Note:** This feature is dependent on the recipient's server supporting delivery receipts and a delivery notification does not confirm that it has been read by the recipient.

Number of hours to retry sending failed emails to server: If AutoMail receives an error when trying to send an email to your SMTP server it will keep retrying every 30 minutes.

This settings allows you to configure how many hours AutoMail will continue to retry before rejecting the email and raising an error. The default is 72 hours.

Licence Tab

The screenshot shows the 'Mocom AutoMail Settings' dialog box with the 'Licence' tab selected. The dialog has a title bar with a gear icon, the text 'Mocom AutoMail Settings', and standard window controls (minimize, maximize, close). Below the title bar are five tabs: 'General', 'Options', 'Email', 'Licence', and 'Advanced'. The 'Licence' tab is active and contains the following elements:

- A text box with the placeholder text: "Please enter your licence code in the box below. The licence code will consist of a long string of numbers and letters - please make sure that you do not include any other text. If the code is valid then the details should appear in the 'Licence Details' box at the bottom." Below this text box is a large empty text input field.
- A section titled "Licence Details" containing the text: "TRIAL MODE - ALL PDF FILES WILL BE WATERMARKED. Trial Expires: 12/05/2012 17:12:32".
- A checked checkbox labeled "Use a proxy server for licence check".
- Three input fields for proxy settings:
 - Proxy Address (name:port): mocsv231:8080
 - Proxy Username: proxy_user
 - Proxy Password: a field filled with 12 dots.
- A "Check Licence Online" button.
- At the bottom of the dialog are "OK" and "Cancel" buttons.

Enter your licence code in the box provided (contact support@mocomsystems.com to get a valid licence code).

If you have a proxy server then please tick the “Use a proxy server for licence check” box.

The proxy address is in the form `servername:portnumber`.

If you need a domain name for your user then please add it before the username e.g. `domainname\username`.

To check the connection to the licence service (or to update the licence) please click the “Check Licence Online” button.

PDF Tab

The screenshot shows the 'Mocom AutoMail Settings' dialog box with the 'PDF' tab selected. The dialog has a green title bar and a tabbed interface with 'General', 'Options', 'Email', 'Licence', 'PDF', 'DMS', and 'Advanced' tabs. The 'PDF' tab is active, showing three main sections: 'Encryption Level', 'PDF Encryption', and 'PDF Restrictions'. In the 'Encryption Level' section, a dropdown menu is set to 'Recommended - 256 Bit AES Encryption (Acrobat Reader X and above)'. The 'PDF Encryption' section has a checked checkbox for 'Require password to view PDF' and a password field containing five dots. The 'PDF Restrictions' section includes a note about license requirements, a checked checkbox for 'Set restrictions on PDF', and an 'Edit Restrictions Password' field with five dots. Below this are eight checkboxes for permissions: 'Allow Print' (checked), 'Allow Full Print' (checked), 'Allow Copy' (unchecked), 'Allow Change' (unchecked), 'Allow Annotations' (unchecked), 'Allow Field Filling' (checked), 'Allow Copying For Accessibility' (unchecked), and 'Allow Assembly' (unchecked). At the bottom right are 'OK' and 'Cancel' buttons.

If the document is to be encrypted use the following level:

While you can choose from various strengths (for backwards compatibility) we advise selecting the latest version “256 Bit AES Encryption (Acrobat Reader X and above)”.

Require password to view PDF:

Sets the default for created attachments to enable encryption of PDF and require a password to view. For compatibility the password can only contain alphanumeric characters plus !"#%&'()*+,-./:;<=>?@[\\]^_{|}~.

Set restrictions on PDF (Requires AutoMail Advanced Options Licence):

Setting restrictions on PDF files can set limits on what a user is able to do with the PDF file. Not all PDF software honours these restrictions in the same way as Adobe products, and in some cases may ignore them.

Edit Restrictions Password:

This password is the 'owner' password that allows editing of document permissions. Note: This needs to be different from the view password above. For compatibility the password can only contain alphanumeric characters plus !"#%&'()*+,-./:;<=>?@[\\]^_{|}~.

Allow Print:

Allow printing of document.

Allow Full Print:

If this is not checked then only low resolution copies can be printed.

Allow Copy:

Allows content copying and content copying for accessibility.

Allow Change: Allows editing, filling of form fields, signing, and creation of templates.

Allow Annotations:

Allows commenting, filling of form fields and signing

Allow Field Filling:

Allows filling of form fields, signing and creation of templates.

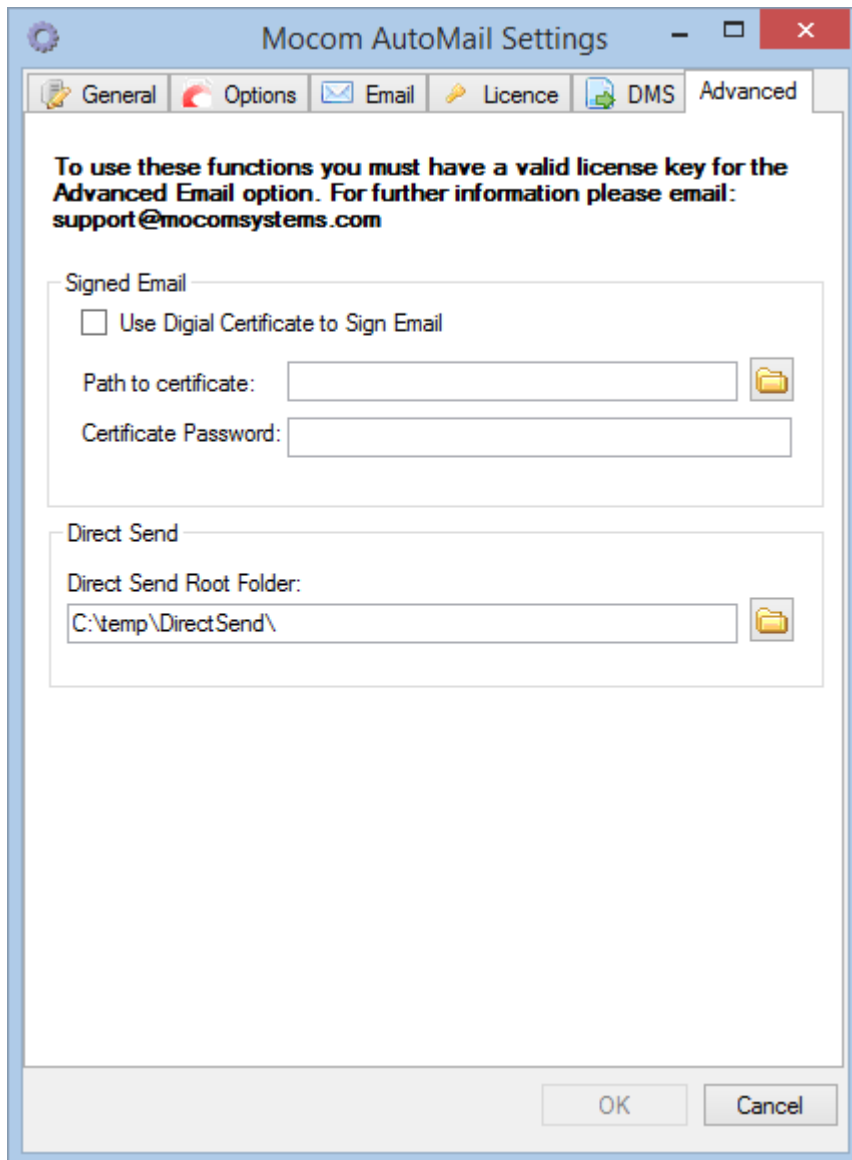
Allow Copying For Accessibility:

Allows content copying for accessibility.

Allow Assembly:

Allows inserting, deleting and rotating pages, and creating bookmarks and thumbnails.

Advanced Tab



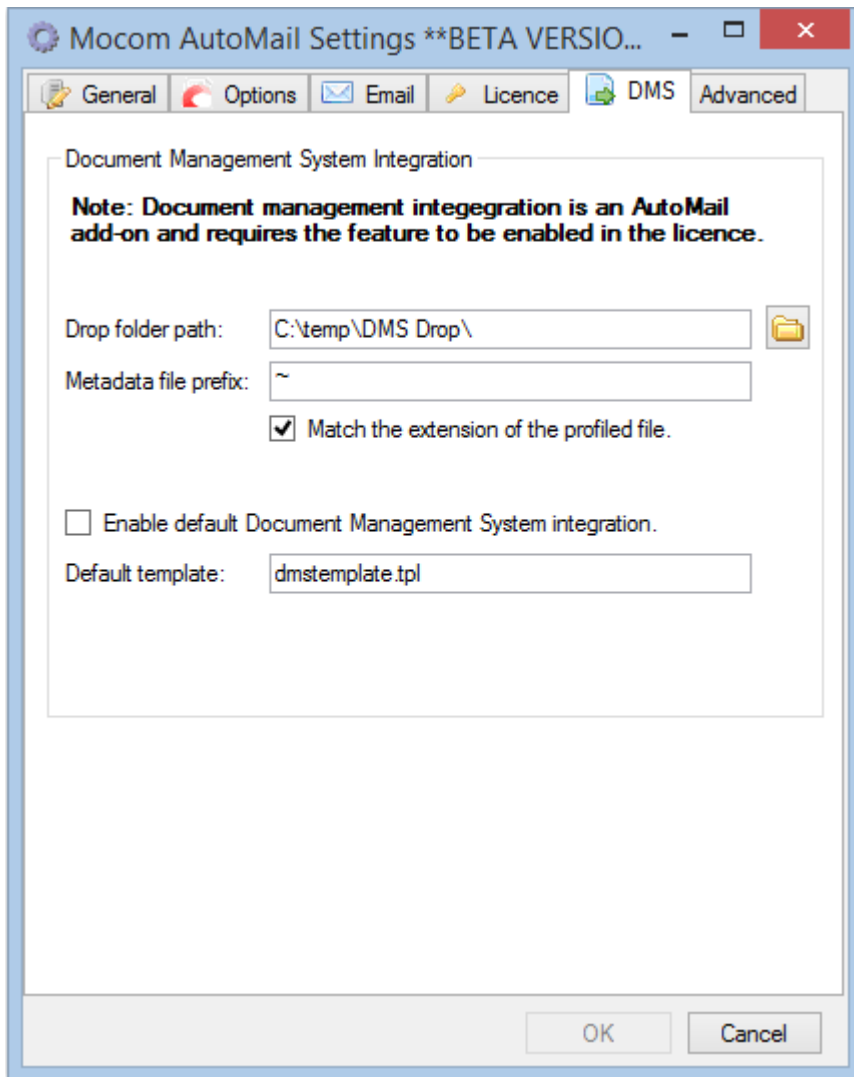
Signed Email:

Using the signed email option allows you to sign email with a personal email certificate. Note that this option requires an additional license to work – please contact support@mocomsystems.com for details.

NOTE: Signed email does not allow for embedded images in HTML Templates.

Direct Send Root Folder: The root folder for direct send messages. See “Direct Send” chapter.

Document Management Server (DMS) Option



Please see later chapter on DMS for further details. Please contact Mocom Systems if you would like to enable this option for your licence.

Drop folder path: The path to the folder that AutoMail should drop files (attachments and metadata files) for the document management system to import.

Metadata File Prefix: This is a prefix that can be added to the name of the metadata file created in the drop folder path.

Match the extension of the profiled file: If this option is selected then AutoMail will create the metadata file using the same extension as the file to be profiled. E.g. if a file "document1.pdf" is to be profiled, then the created metadata file will have the extension 'pdf'. This option is only available if there is an entry in the metadata file prefix text box. If the box is unchecked then the extension "XML" will be used.

Enabled default document management system integration: Select this option to enable integration for every job by default.

Default Template: The name of the template file that AutoMail will use to create the metadata file. This would usually be an XML file with variables that AutoMail will replace with data supplied in the Job Separator page. The file must be placed in the resources folder.

AutoMail Monitor

Starting AutoMail Monitor

To start AutoMail monitor click: Start > All Programs> Mocom Systems > AutoMail > AutoMail Monitor

The screenshot shows the AutoMail Monitor application window. The title bar reads "AutoMail Monitor" with standard window controls. The menu bar includes "File", "View", "Tools", "Help", and "Feedback".

The left sidebar contains a tree view with the following categories:

- Monitor**
 - Overview
 - Log Files
- Email Service**
 - Sent
 - Retry
 - Failed
- PDF Service**
 - Completed Batches
 - Completed Jobs
 - Failed Batches
 - Failed Jobs
- Print Service**
 - Completed Jobs
 - Failed Jobs

The main content area is divided into two sections:

Services

AutoMail Email Service status:	Running	[Play] [Stop] [Refresh]
AutoMail PDF Service status:	Stopped	[Play] [Stop] [Refresh]
AutoMail Print Service status:	Stopped	[Play] [Stop] [Refresh]

Below the services section, there are three tabs: "Email Service" (selected), "PDF Service", and "Print Service".

The "Email Service" tab displays the following statistics:

Sent Emails:	1
Failed Emails:	16
Emails in retry queue:	0
Jobs being processed:	0
Jobs in watch folder:	0

Information from the last 30 days.

At the bottom of the window, the AutoMail logo is displayed on the left. On the right, the following information is shown:

- Licensed To: **Mocom Systems (Colin)**
- Licence Expires: 26/07/2017
- Last checked: 15/06/2016 12:01:34
- Version: 3.3.0

A "Refresh" button is located at the bottom right of the window.

Controlling the AutoMail Services

In the services box on the AutoMail Overview screen, you can see the status of the installed AutoMail services. You can use the in-line buttons to start, stop or restart individual services, or select the icons at the bottom to stop, start or restart all services.

Using AutoMail monitor

Monitor

Overview

The overview page shows a summary of the present status of the AutoMail services, along with a tabbed view of statistics for the services. It also tells you the current AutoMail version and the date that the licence will expire.

AutoMail

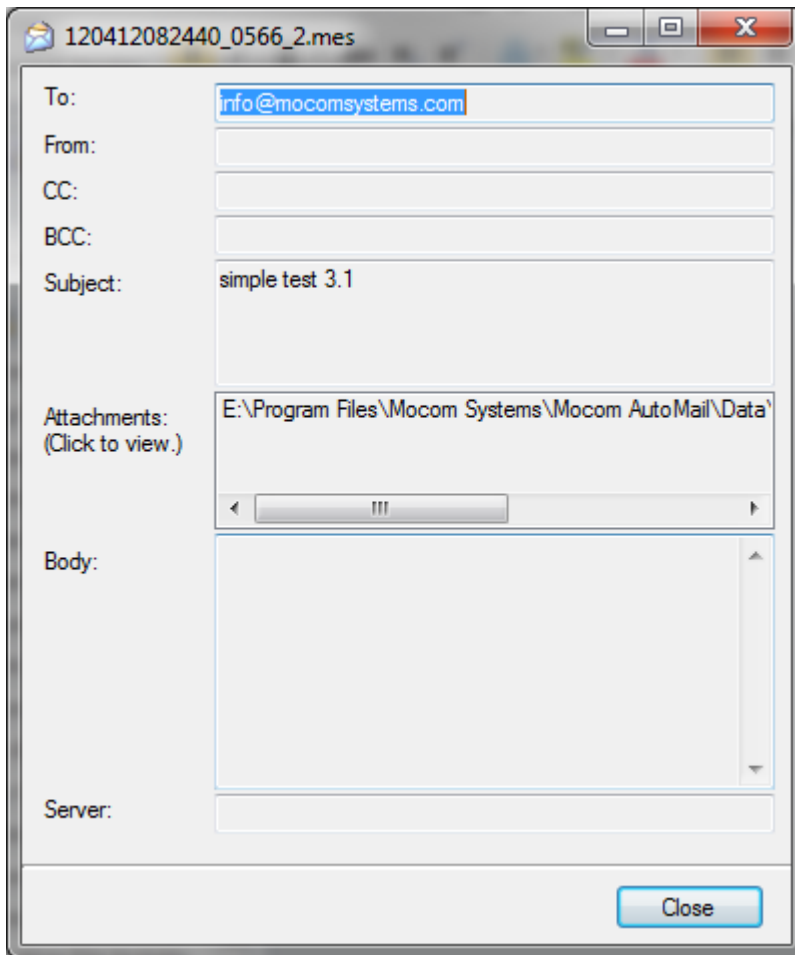
Sent

This view shows the list of sent emails (less than a month old).

Note:

An item is listed as being sent when AutoMail successfully transfers the message to the recipient SMTP server – it does **not** confirm that the message has arrived in a recipient's mailbox. If a message has been sent, but the user has not received it then please check the message is not in the recipient's spam/junk folder. Also check the queue/logs on the SMTP server that AutoMail used to deliver the message.

Click on an item to show the details:



Retry

This view lists all the messages that AutoMail has been unable to send and is queuing for retry. AutoMail will try to resend messages every hour for up to three days before failing the messages.

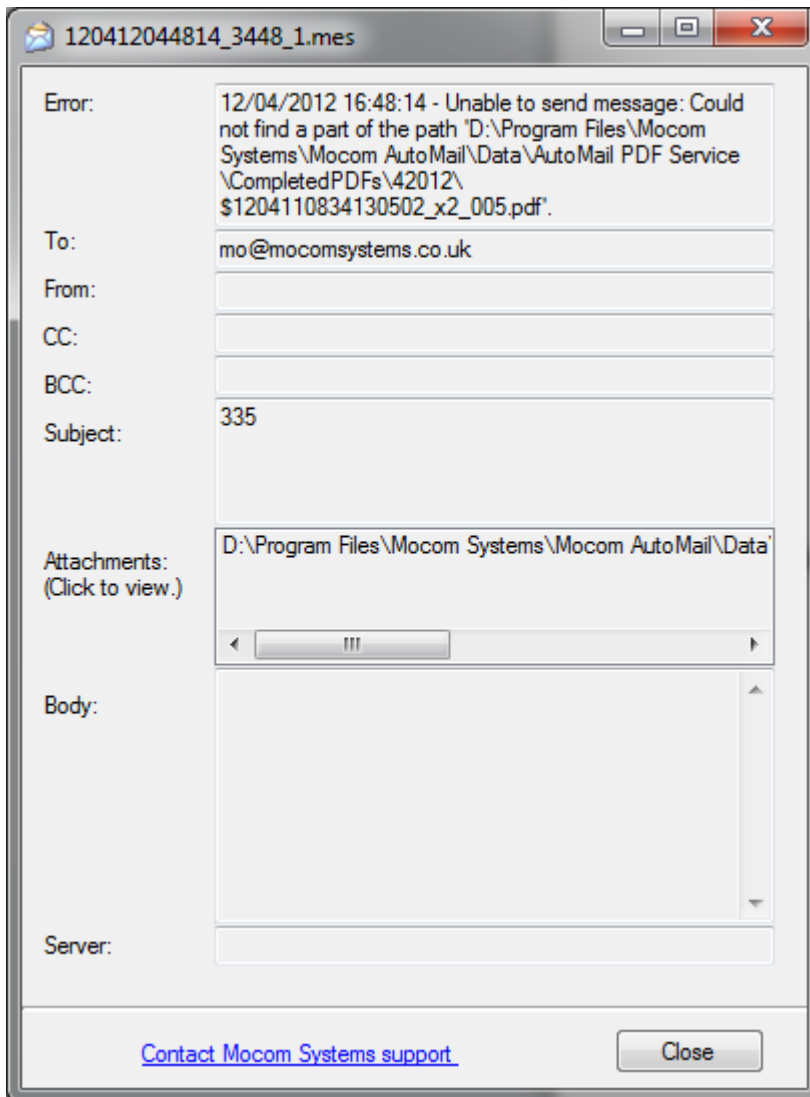
NOTE:

This does not show messages being queued for retry on the relay SMTP server.

To cancel messages, stop the AutoMail service (this will prevent the files from being changed while you are selecting them), select the file(s) to cancel in the grid, right click and select "Cancel...".

Failed

This view lists all messages that have failed to send. Double click on an item to show the details:



In the above example, the Error message indicates that AutoMail could not find the PDF attachment to add to the email.

PDF Service

Completed Batches

This view shows a list of the source PDF files that have completed. Click on a row to show the PDF file.

Completed Jobs

This view shows a list of the attachment files that have been created from the source PDFs. Click on a row to show the PDF file.

Failed Batches

This view shows a list of the source PDF files that have failed (see the log files for detailed error messages). Click on a row to show the PDF file.

Failed Jobs

This view shows the list of jobs within a source PDF file that have failed (e.g. incorrect email address). These file are only created when the "On error reject whole source file" option is selected. Click on a row to open a text file with the details of the error.

Print Service

Completed Jobs

This view shows a list of completed print jobs. (This does not guarantee that the document printer, just that AutoMail successfully sent the job to the designated print queue). Click on a row to open a text file with the details.

Failed Jobs

This view show a list failed print jobs. Click on a row to open a text file with the details of the error.

'PDF Watch' and 'Script Watch' Directories

For AutoMail to pick up PDF source files you need to save (or copy) it into the 'PDF watch' directory. If you are sending a simple email using a script then drop a text file with a '.mes' extension into the 'Script Watch' directory.

The 'PDF Watch' is configured using the "Directory to watch for source PDF files" option on the "General" tab of the settings application.

The 'Script Watch' directory is configured using the "Email script file watch directory" option on the "Advanced" tab of the settings application.

NOTE:

Files should not be edited in either of the watch directory.

PDF Report Scripts

Using source PDF files

The AutoMail PDF service scans a designated folder for PDF files that are used to generate emails messages.

When the AutoMail PDF Service detects a PDF file, it parses the PDF Report and splits the file into multiple PDFs using the Job Separator field (see AutoMail Settings). It then passes the information in the Job Separator page (e.g. :TO, :SUBJECT, :CC etc) to the AutoMail service which attaches the relevant split PDF file.

Example:

Crystal Reports is used to generate a PDF with numerous invoices that need to be emails to customers.

Each invoice is separated by a page the contains :TO, and :SUBJECT details for each invoice (and any AutoMail script commands as needed e.g. :FROM, :ENC etc.).

The PDF file is dropped in the PDF Watch directory and picked up by the AutoMail PDF service. The AutoMail PDF service detects each Job Separator page and splits the report into multiple PDFs. It then passes the contents of the Job Separator page, along with the name of the new PDF file over to the AutoMail service.

The AutoMail service uses the commands in the Job Separator page to generate an email and attach the PDF file that has been split from the report.

Note:

While AutoMail has been tested with many different types of PDF generator application, due to the complex nature of the PDF format we cannot guarantee that all PDF files will work. We therefore suggest that you test your PDF generation system thoroughly with AutoMail before putting the system into production. Please contact Mocom Systems if you have any problems with generated PDF files.

AutoMail Commands

Overview

AutoMail commands are entered using the **:COMMAND** word followed by a space and then the options for that command. e.g. **:SUBJECT** This is an email subject.

For display purposes, the format for this manual shows the commands in bold, followed by the options surrounded by <>. e.g. **:SUBJECT** <text of the subject>

PDF and Basic Email Script Commands

:TO <to address> - The address to send the email to. Multiple addresses can be entered, separated by semicolon.

:CC <cc address> - The address to carbon copy emails to. Multiple addresses can be entered, separated by semicolon.

:BCC <bcc address> - The address to blind carbon copy emails to. Multiple addresses can be entered, separated by a semicolon.

:SUBJECT <text of the subject> - The subject line of the email message.

:ENC <path to file> - Path to an attachment that will be sent with the email E.g. **:ENC** c:\temp\letter.docx. It is possible to have multiple **:ENC** commands to send multiple attachments. You can also use *.* to add all the files in a folder e.g. **:ENC** c:\temp*.* will add attach all the files in the temp directory.

:BEGINBODY and **:ENDBODY** - Any text between these two statements will be used as the email message.

:FREETEXT <ignore/body> - Use this command to override this default Free Text behaviour.

Options:

- IGNORE** - Text in body is ignored. (Default)
- BODY** - Text in script is used in the message body.

:FROM <from email address> - Overrides the default 'from' address for the current email.

:NOTIFYSENT <NO/email address|YES or NO> – Overrides the default notification setting. Enter the email address of the person you would like to notify for this particular job. If you want to override the AutoMail setting to include the sent attachments then add a pipe character “|” followed by YES to include, or NO to exclude. Use NO on its own to indicate that you don't want to enable notifications for this job.

e.g:

:NOTIFYSENT NO - this will disable notifications for a job, overriding any default settings.

:NOTIFYSENT automail@mocomsystems.com|YES - will send notification email and include the sent attachments.

:NOTIFYSENT automail@mocomsystems.com|NO - will send notification email without the sent attachments.

:REQUESTDELIVERYNOTIFICATION <YES/NO> - Overrides the default request delivery notification setting.

PDF Commands Only

:RefTag <unique string>

Although highly unlikely, it is possible for a Job Separator Page to be missed within a batch by the parser if its content cannot be deciphered (or due to an incorrect/corrupt PDF source file) causing subsequent page(s) to be emailed as part of the attachment to an unintended recipient.

To prevent this, a unique RefTag (Reference Tag), may be defined per job which should only appear on the Job Separator Page and subsequent pages belonging to that job.

When :RefTag is invoked, Automail PDF service will parse subsequent pages up to the next Job Separator Page and provided these pages each contain the specified unique string, it extracts them into a PDF attachment for this email. Otherwise it will reject the job.

To ensure further safeguard, the PDF attachment file is reopened after creation and each page reparsed to contain the specified RefTag and only accepted when all pages meet this requirement.

e.g.:
:reftag Invoice No: 025674

:ENCRYPTIONLEVEL <1/2/3>

This is used to set the level of encryption for the :PDFPASSWORD command below.

1 = 128 Bit RC4 Encryption
2 = 128 Bit AES Encryption (compatible with Acrobat Reader 7 and above)
3 = 256 Bit AES Encryption (compatible with Acrobat Reader 9 and above)
4 = (Recommended) 256 Bit AES Encryption (compatible with Acrobat Reader X and above)

e.g. :encryptionlevel 3

:PDFPASSWORD <password>

PDF will be encrypted and a password will be required to view the document. (See also :encryptionlevel command).

e.g.:
:pdfpassword abcd123

If you want to override and **not** encrypt the PDF when you have a default password set in AutoMail Settings, then use NONE after the command.

e.g.:
:pdfpassword NONE

For compatibility the password can only contain alphanumeric characters plus !"#\$\$%&'()*+,-./:;<=>?@[\\]^_{|}~.

NOTE: Do not use the same password for :PDFPASSWORD and :PDFRESTRICT. AutoMail will reject the job if this is the case.

:PDFRESTRICT <option,option,option...>|<password>

Setting restrictions on PDF files can set limits on what a user is able to do with the PDF file. The PDFRESTRICT password will also allow access to an encrypted document using the :PDFPASSWORD command below.

For compatibility the password can only contain alphanumeric characters plus !"#\$\$%&'()*+,-./:;<=>?@[\\]^_{|}~.

Not all PDF software honours these restrictions in the same way as Adobe products, and in some cases may ignore them.

Options Allow recipient(s) to

PR	print
PF	print at full resolution. Only low-resolution allowed*
CH	make changes/edits
AN	add annotations and comments
FF	fill in form fields*
AS	assemble*
CO	copy text and graphics
AC	use content accessibility features*

Examples:

```
:PDFRESTRICT |<password>    allows nothing, i.e. most secure
:PDFRESTRICT pr|<password>   allows printing at low resolution
:PDFRESTRICT pr,pf|<password> allows printing at high resolution
:PDFRESTRICT ch|<password>   allows making changes/editing
```

NOTE: Use of PDF Restrictions requires the AutoMail advanced options licence.

NOTE: Do not use the same password for :PDFPASSWORD and :PDFRESTRICT. AutoMail will reject the job if this is the case.

If you want to override and **not** restrict the PDF when you have a default restrictions set in AutoMail Settings, then use |NONE after the command.

e.g.:

```
:pdfrestrict |NONE
```

:PDFLOCK This command is no longer used. Please use :PDFRESTRICTION instead.

:GROUP <yes/no>

This command has been added to provide additional job level control over how emails are grouped. For instance if the Group Attachments by Recipients option is set, :GROUP no can be used to exclude the job from being grouped.

NOTE: If attachments are grouped by recipient, then the email contents will be created from the contents (body, variables, template etc.) of the first job separator.

:OUTPUT <email/print/both> enforces the following rules:

- a. :OUTPUT email – only emails and ignores printing commands - must have :TO with at least one email address
- b. :OUTPUT print – only prints and ignores email commands – must have at least either :PRINT or :TO <printer address>
- c. :OUTPUT both – emails and prints – must meet a) and b) conditions above

If :OUTPUT is absent then the default is to email or print according :TO, :CC, :BCC and :PRINT

:FOLDERPATH <path> - The name of a folder to place completed PDF attachment files. The path must end with a trailing backslash (this is required to check the line has not wrapped) e.g. c:\automail\. **Note:** If the name contains invalid characters then this will be ignored and a default folder name will be used.

:FILEPREFIX <prefix> Prefix text to the name of the created PDF file. **Note:** If the name contains invalid characters then this will be ignored and a default file name will be used).

:BATCHERROREMAIL <email address> - Used to set the Source PDF error emails per batch. (See “Send invalid content notifications to:” settings option for further details).

:ONERRORREJECTWHOLESOURCE <yes/no> Switches the "On error reject whole source" option per batch.

:TEMPLATE name of template file to use for HTML template (see later section on templates)

:BEGINVARS and **:ENDVARS** are used to pass variables through to an HTML or Document Management System (XML) template (see later section on templates).

PDF Commands For Optional Print Service

If you have a licence for the optional AutoMail Print service then you can use this facility to print the PDF attachment to a designated printer including a tray selection.

The actual print command is invoked per job and can either be **:PRINT** or a specially formatted !PRINT@ email address as an argument for the **:TO** command.

Provisions have also been made for multiple prints by the use of multiple **:PRINT** or multiple **!PRINT@** email addresses, e.g., draft copy for filing and actual invoice on letterhead to send via post.

Examples:

```
:print hp laserjet 5M~15  
:print hp laserjet 5M~260
```

Or/and

```
:To test@mocom.co.uk; !print@hp laserjet 5M~260; info@mocomsystems.com;  
!print@hp laserjet 5M~15
```

Note: ~ is the delimiter between printer name and tray

If the AutoMail Print Service is running as "Local System" (the default), then printers need to be installed locally (though they can be network printers connected via a TCP port) for AutoMail to see them. If AutoMail is running as a user account, then the printer must be installed for the user account and the account must have access to the printer queues.

When the AutoMail Print Service starts it creates a "printers.txt" file in the Log directory with a list of available printers. This can also be accessed via the View>Printer List menu in AutoMail monitor.

PDF Commands For Document Management Server (DMS) option

:DMS < DMS Type | DMS Template Name > - This indicates the type of DMS (presently only generic) and the name of the DMS template to use. See later section on DMS options for further details.

e.g :DMS generic | dmstemplate

Basic Email Script Commands Only

:DOC - Indicates the start of a new message. It is possible to have multiple emails contained in one script file.

:ENDDOC - Indicates the end of a message. If the 'Use :ENDDOC' option is enabled then this must appear at the end of a script or the script will fail.

:FOLDERNAME <path> - The name of a folder under the root folder to place completed and sent scripts

Unknown commands in PDF source file

If AutoMail detects a command line beginning with a ":" but the command following is not listed above, then the PDF file will be rejected. This helps prevent mistakes in the source batch PDF file (e.g. incorrectly spelt command) causing unintended issues.

Log Files

Configuration

Use the logging option in 'AutoMail Settings' to configure the logging level.
(See Page 10)

Log Creation

Log files are created for every day. It is recommended that you leave the logging level on high to enable any troubleshooting. Log files older than 2 months will get deleted automatically.

Reading the Log Files

To read the log files that have been created by AutoMail, click the 'Logs' view in AutoMail monitor.

HTML Email Templates

Overview

AutoMail supports the use of HTML email templates, which allows for the creation of complex formatted HTML based email, from simple data provided by the job separator pages. The templates include variable placeholders which are replaced with provided data (similar to a mail merge), which along with embedded images, allow for emails with sophisticated designs to be sent.

There are a number of sample templates along with corresponding source PDF files included in the “samples” directory. The templates and image files can be copied to the “Resources” folder and you can drop the source PDF files into the PDF Watch folder to test how these work.

Note: Embedded Images in the template are not currently supported with Advance Option “Use Digital Certificate to Sign Email”

Template

Text files containing HTML & CSS code for your emails need to be placed in the “Resources” (off the root directory) and saved with the extension “.tpl”.

To use a template you have two options:

1. If you save the template as “default.tpl” and tick the “Use Default HTML Template” option in settings then every email (unless specified in the job separator) will use the contents of the “default.tpl” file.
2. In the job separator file add the command **:TEMPLATE** *templatename*
e.g. to use a template file called “invoice.tpl” add the command:

:TEMPLATE invoice

Variables

To be truly useful HTML templates need to allow for content to be added on a ‘per email’ basis, otherwise emails would all be the same. AutoMail provides variables (placeholders) each occurrence of which are replaced by data provided in the job separator page. For instance, if you want to have the name of the recipient in each email, you need to add a variable tag to the template in the position(s) that

you want the name to appear, then in the job separator you need to provide the name that you want inserted.

To add a variable to your HTML template use the tags `<am_var></am_var>`.
e.g. `<am_var>contact</am_var>`

To provide the variables in the job separator you need to use the **:BEGINVARS** and **:ENDVARS** commands. Between these commands you add each variable in the format *VariableName=VariableData* followed by a pipe character "|".

e.g.
:BEGINVARS
ref=12345|Name=Joe Smith|
Address=123 Wood Lane, Southampton|
Amount=£200|
:ENDVARS

NOTE: AutoMail scans both the template to be used and the job separator page to make sure that the variables match. If there are variables in the template, but no data is provided, or if data is provided but there are no corresponding variables in the templates then an error will be raised and the job will be rejected.

Body Variable

The variable `<am_var>body</am_var>` is a special 'reserved' variable and can be used in a template to indicate where the body of the email is to be placed. You must not provide a Body variable in the job separator but just provide the body as usual.

Note: Because the data for the 'body' variable is provided automatically, if you include a 'body=' reference in the **:BEGINVARS** **:ENDVARS** section of a job separator the job will be rejected.

Embedded Images

AutoMail allows for images (.jpg or .gif) to be embedded in emails (e.g. for logos, signatures etc.) using a special tag. When AutoMail detects an image tag it checks the resources folder to find the image and then embeds the image into the email. This embedded image can then be used in a normal HTML IMG tag.

To embed an image:

1. In the body of your email message you need to add a tag with the name of the image file to insert into your email in the form
`<am_embed>filename</am_embed>`.

e.g. `
```

2. In the “/Resources” folder (off the AutoMail root folder) place a copy of the image file to be embedded.

e.g. Copy the logo.jpg file into “C:\Program Files\Mocom Systems\Mocom AutoMail\Resources”

---

## Example

You create a template with the following text:

```
<!-- Very simple template to add an image to the bottom of an email. -->

<p>
 <am_var>body</am_var>
</p>


```

Save the template to the “/Resources” folder with the name “test.tpl”. In your job separator page include the command: “:TEMPLATE test”

# Document Management Server (DMS) Option

If the DMS option is enabled then AutoMail will create a copy of each sent attachment in a specified location, and create an XML metadata file with the same name with the content based on a particular template and variables supplied in the header page. This allows any DMS system that supports this method of importing, to pick up the attachment file and profile it into their database.

The templates use the same format and variables as shown in the “HTML Email Template” above.

You can either use the :DMS command (see commands section) to set the template, or set the default template in AutoMail settings.

The location to save both XML files and attachments is set in AutoMail settings.

Please contact [support@mocomsystems.com](mailto:support@mocomsystems.com) or your AutoMail provider if you would like to have the DMS option enabled for you licence.

# Direct Send

---

This functionality allows you to automatically email any file by dropping it into a specified folder, e.g. if you have a file that you often send to a particular set of people in a particular format,

To setup Direct Send:

1. Create a folder and set that as the Direct Send Root folder in AutoMail **Settings** ensuring Mocom AutoMail service has full rights to this folder and its subfolders.
2. Restart the Mocom AutoMail service.

Each Direct Send watch folder consists of an appropriately named subfolder and a script file bearing this subfolder's name in the Direct Send Root folder specified above.

To create a Direct Send watch folder:

1. In the Direct Send Root folder create a subfolder – we suggest you use a short name that contains details of where files dropped into this folder will be sent, e.g. **Daily PO to Head Office**
2. Also in the Direct Send Root folder create a text document with the name of the folder you created in step 2 and with the extension “.ads”, e.g. **Daily PO to Head Office.ads**
3. In this text file add email script commands that will be used to send the email – e.g.

```
:doc
:from sales@mocomsystems.com
:to abc@def.com
:subject Attached are Today's Purchase Orders
:template simple
:enddoc
```

You may repeat steps 1 to 3 above to create additional Direct Send watch folders to suit your requirements. However although no limit is set by AutoMail, you may wish to keep the number of Direct Send watch folders limited for simplicity.

You can use the following wild cards in the ads file templates:



<%FILENAME%> The name of the attachment (without extension)  
<%DATE%> The date the file was dropped.  
<%TIME%> The time the file was dropped.  
<%FOLDER%> The name of the Direct Send folder the file was dropped into.

**Note:** AutoMail moves the file(s) from the Direct Send folder to the data storage area as soon as it is processed.

To use Direct Send you need to have a valid licence key for the Advanced Email Option. Please contact [support@mocomsystems.com](mailto:support@mocomsystems.com) for more information.

# Further Information

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## Contact Information

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