

Ultiforms®

User Guide



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SETUP AND INSTALLATION

System Requirements:

Ultiforms has the following installation requirements:

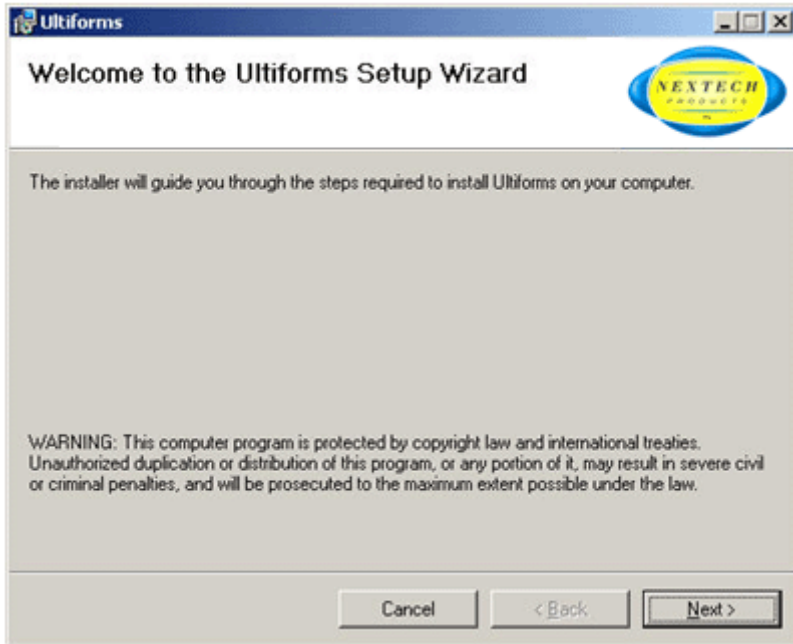
- Intel based system with at least 2.4 MHz CPU.
- 2GB RAM or higher.
- Windows 2000, Windows XP Pro, Windows 2003, 2005, 2008 server.
- Disk space based on number of documents to be stored.
- Microsoft .NET Framework Redistributable 1.1
<http://www.microsoft.com/downloads/details.aspx?FamilyID=262d25e3-f589-4842-8157-034d1e7cf3a3&displaylang=en>
- Microsoft Visual J#.NET Redistributable package
<http://www.microsoft.com/downloads/details.aspx?FamilyID=301f28aa-49b6-4b32-832c-873707e50834&DisplayLang=en>
- Free Adobe Acrobat Reader
<http://www.adobe.com/reader>
- For e-mailing, a MAPI compliant e-mail application such as Microsoft Outlook, Outlook Express, Eudora, etc.
- For faxing, Microsoft Faxing Services (Windows CD)

Installing Ultiforms:

Ultiforms uses an installation setup program to step you through the installation process.

To install the program, put the CD-ROM in your drive. The setup program will run automatically. If it does not, then select **Start->Run**, and enter **x:\UltiformsSetup.exe** where **x:** is the letter of your CD-ROM drive.

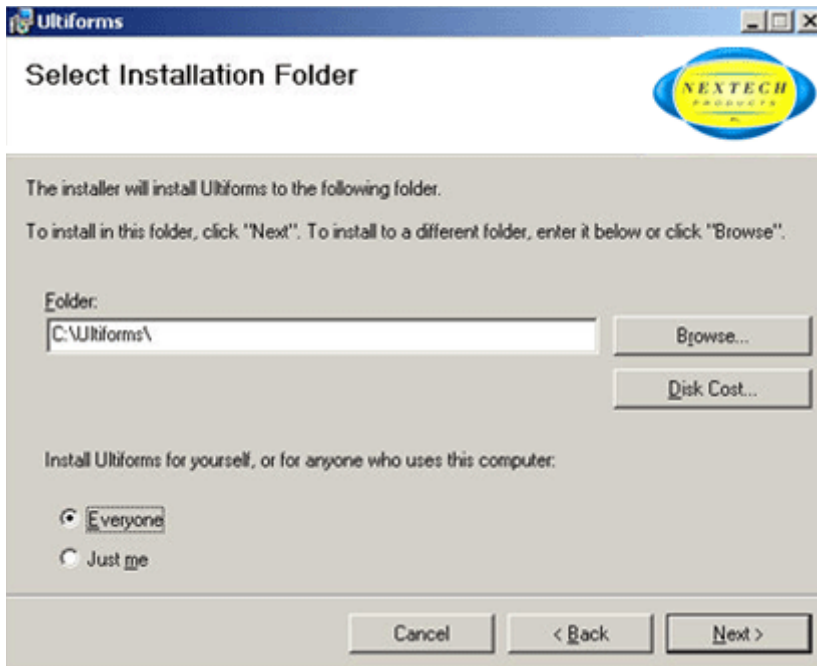
After the setup program is done with its initialization, you will see the *Welcome* screen. Press **NEXT** to continue the installation.



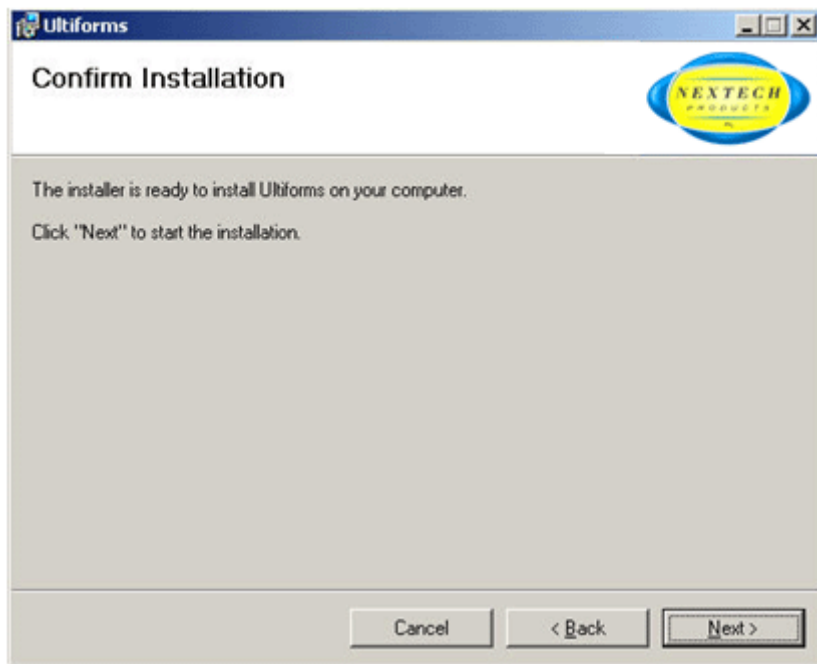
The next screen is the *Software License Agreement* screen. Please read the license agreement, and if you agree, press **Yes**. If you choose No, the installation program will exit.



The next screen shows the location where the program will be installed. You can also **Browse** to put the program into a different location. Click **Next** to accept the destination folder.



Click **Next** again to confirm and start installation.

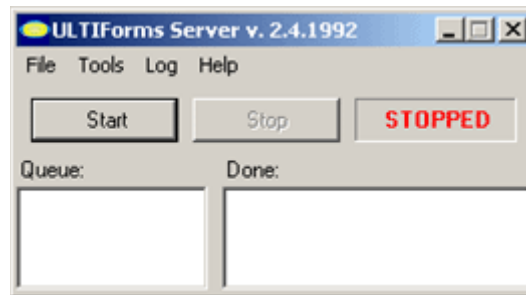


Congratulations! Setup is complete!

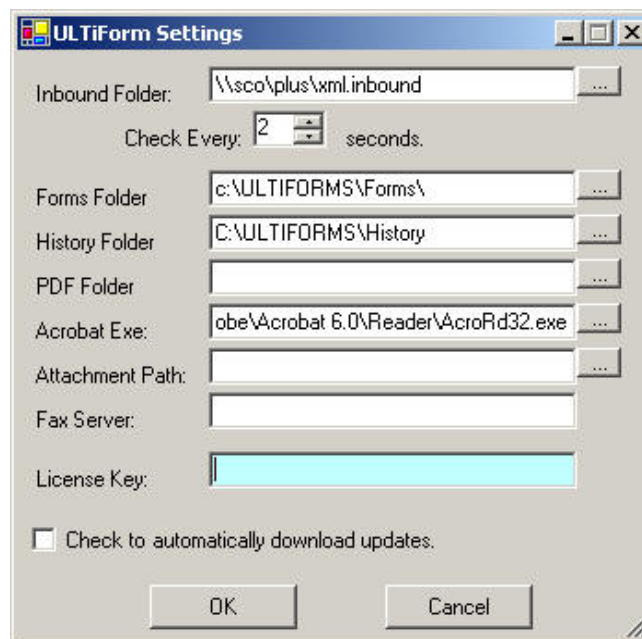
After the program has been successfully installed, you can run **Ultiforms** from the shortcut created on the Desktop.

CONFIGURING ULTIFORMS

Start the program from the shortcut on the Desktop.



Click on **Tools** -> **Options** to display the settings dialog.



- Enter the path to **the Inbound folder**. This is the folder where the program looks for incoming XML documents from foreign systems. Make sure the folder has read/write permissions.
- Enter the path to the **Forms folder**. This is the folder where the PDF forms are stored.
- Enter the path to **History folder**. This is the folder where all the XML documents and filled out PDF's are stored after they are processed.
- Enter the path to the **Adobe Reader executable**. Generally "C:\Program Files\Adobe\Acrobat x.x\AcroRd32.exe" where x.x is the version number.
- Enter the **license key** given by Nextech Products Of Florida, LLC.
- The other fields are **optional** for special cases and are not required to be filled in.

To insert fill-in fields go to **Tools - Advanced Editing - Text Field Tool**, then draw a box where you want the field to be. The text field properties window will pop-up, under Name enter the name of the tag that will be used in the XML document.

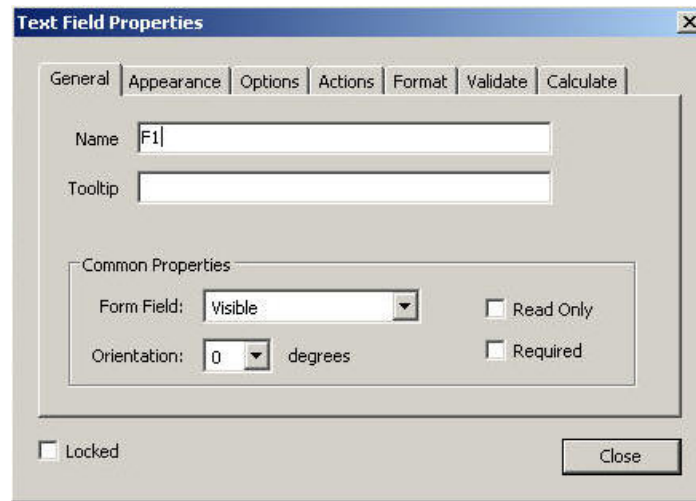


Figure 2. Field properties window.

For tag naming conventions please refer to the XML Document section of this guide. For L-Tags with the same name please append a semicolon and an increasing number to the name of the field. The number will determine the order in which the rows will be printed.
e.g. L1:1, L1:2, L1:3,...,L1:N



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SOLD TO	<input type="text"/>	SHIPPED TO	<input type="text"/>
	<input type="text"/>		<input type="text"/>
	<input type="text"/>		<input type="text"/>
	<input type="text"/>		<input type="text"/>
	<input type="text"/>		<input type="text"/>

INVOICE DATE	INVOICE NO.	ACCOUNT NO.	CUSTOMER ORDER NO.	SALES REPRESENTATIVE	SHIPPING ORDER NO.	TERMS	F.O.B.	SHIPPING POINT
10-01	10-01	10-01	10-01	10-01	10-01			
10-02	10-02	10-02	10-02	10-02	10-02			
10-03	10-03	10-03	10-03	10-03	10-03			
10-04	10-04	10-04	10-04	10-04	10-04			
10-05	10-05	10-05	10-05	10-05	10-05			
10-06	10-06	10-06	10-06	10-06	10-06			
10-07	10-07	10-07	10-07	10-07	10-07			
10-08	10-08	10-08	10-08	10-08	10-08			
10-09	10-09	10-09	10-09	10-09	10-09			
10-10	10-10	10-10	10-10	10-10	10-10			
10-11	10-11	10-11	10-11	10-11	10-11			
10-12	10-12	10-12	10-12	10-12	10-12			
10-13	10-13	10-13	10-13	10-13	10-13			
10-14	10-14	10-14	10-14	10-14	10-14			
10-15	10-15	10-15	10-15	10-15	10-15			
10-16	10-16	10-16	10-16	10-16	10-16			
10-17	10-17	10-17	10-17	10-17	10-17			
10-18	10-18	10-18	10-18	10-18	10-18			

Form with fill-in fields. (<http://www.nextechfl.com/ultiforms/jrm1.pdf>)

After all the fields have been created, save the PDF file in the **Forms** folder as configured in Ultiforms.

XML DOCUMENTS

Creating XML documents

All XML documents generated by the host server need to be placed on the **Inbound folder** as set up in the configuration of **Ultiforms** .

1. The document must meet the XML standards of version 1.0 or higher.
2. The root tag must be **<request>**.

Predefined Tags

There following set of tags required are required by **Ultiforms** and all of them must be in **lower case** (the value may be either upper or lower case).

TAG NAME	REQUIRED	DESCRIPTION
FORM	ALWAYS	The value will be the name of the form without the extension, the form must exist in the Forms Folder defined in Setup e.g. Invoice
METHOD	ALWAYS	Possible values: EMAIL , PRINTER , FAX , OPEN
EMAIL	EMAIL	This is the TO: email recipient. e.g. test@hotmail.com, friend@yahoo.com
CC	EMAIL	This is the cc recipient. May be null.
BCC	EMAIL	This is the bcc recipient. May be null.
SUBJECT	EMAIL	This is the email subject. May be null.
TEXT	EMAIL	This is the body of the e-mail. May be null.
PRINTER	PRINTER	Name of an existing Windows printer. e.g. HPRoom1 or BossOfficeLaser or PayrollPrinter
FAXNUMBER	FAX	Fax number to be dialed (include country code and area code if necessary). e.g. 12121234567
FAXTO	FAX	This is the name of the fax recipient.

Custom Tags

TAG TYPE	DESCRIPTION
F-TAG	General type tag. Generally used for header and footer fields. Will appear on every page of the PDF document. Tag can be any but may not start with 'L', 'S' or 'T'. e.g. <INVNO></INVNO> <BILLTO> </BILLTO>

L-TAG	Tag used for line items. Each different tag name represents a column or field, tags with the same name represent rows or records within the same column. Tag name must start with 'L'. Will appear on every page of the PDF document. e.g. <L1></L1> <L2></L2> or <L-QTY></L-QTY> <L-DESC></L-DESC>
S-TAG	Tag used to display data on all pages except the last one. If document only has only 1 page then it will not be displayed. Must start with 'S' e.g. <S1>CONTINUE ON NEXT PAGE...</S1>
T-TAG	Tag used to display data only on the last page of the document. If document has only 1 page it will be displayed. Must start with 'T' e.g. <T-TOTAL> \$183.12<T-TOTAL>

Sample XML Document

```

<?xml version="1.0" ?>
<request>
  <form>INVOICE</form>
  <method>printer</method>
  <text>This is an original invoice - Please Pay</text>
  <subject />
  <printer>HP-LaserJet Office</printer>
  <F1>OPHELIA'S</F1>
  <F2>2930 E. 3RD STREET</F2>
  <F3>SUITE# 5</F3>
  <F4>LONG BEACH, CA 90814</F4>
  <F5 />
  <F6>OPHELIA'S</F6>
  <F7>208 ORANGE AVENUE</F7>
  <F8>LONG BEACH, CA 90802</F8>
  <F9 />
  <F10 />
  <F11>06/01/05</F11>
  <F12>151517</F12>
  <F13>OPH-90814</F13>
  <F14>REPLACEMENT</F14>
  <F15>HOUSE</F15>
  <F16>639400</F16>
  <F17>CREDIT CARD</F17>
  <F18 />
  <S1>***** CONTINUED ON NEXT PAGE</S1>
  <S2 />
  <L1>0.45</L1>
  <L2>0.450</L2>
  <L3>M</L3>
  <L4>4913</L4>
  <L5>3/4</L5>
  <L6 />
  <L7>BLACK</L7>
  <L8>BONING TAPE</L8>
  <L9>411.29/M</L9>
  <L10>185.08</L10>
  <L1>0.15</L1>
  <L2>0.150</L2>
  <L3>M</L3>
  <L4>4907</L4>
  <L5>9/16</L5>
  <L6 />
  <L7>BLACK</L7>
  <L8>COTTON BONING TAPE</L8>
  <L9>280.92/M</L9>
  <L10>42.14</L10>
  <T1>Y UPS Ground</T1>

```

<T2>11</T2>
 <T3>1</T3>
 <T4>227.22</T4>
 <T5>0.00</T5>
 <T6>227.22</T6>
 <T7 />
 <T8>ORIGINAL</T8>
 <T9>SHIPPED COMPLETE</T9>
 <T10>PER PACK-LIST: 031618</T10>
 </request>

<http://www.nextechfl.com/ultiforms/form1.xml>

Output:

1 of 1



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 323/838-0600 • 800/828-1764 • Fax 323/838-0700

SOLD TO

OPHELIA'S
 2930 E. 3RD STREET
 SUITE# 5
 LONG BEACH, CA 90814

SHIPPED TO

OPHELIA'S
 208 ORANGE AVENUE
 LONG BEACH, CA 90802

INVOICE DATE	INVOICE NO.	ACCOUNT NO.	CUSTOMER ORDER NO.	SALES REPRESENTATIVE	SHIPPING ORDER NO.	TERMS: F.O.B. SHIPPING POINT			
06/01/05	151517	OPH-90814	REPLACEMENT	HOUSE	839400	CREDIT CARD			
QTY. ORDERED	QTY. SHIPPED	UNIT	PATTERN	SIZE	*	COLOR	DESCRIPTION	UNIT PRICE	TOTAL
0.45	0.450	M	4913	3/4		BLACK	BONING TAPE	411.29/M	186.08
0.15	0.150	M	4907	9/16		BLACK	COTTON BONING TAPE	280.92/M	42.14
SHIPPED COMPLETE									
ORIGINAL							PER PACK-LIST: 031618		
SHIPPED VIA				WEIGHT	NO. CTGS.	NET INVOICE	SHIPPING & HANDLING	AMOUNT	
Y UPS Ground				11	1	227.22	0.00	227.22	



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