

# Create!form® for Microsoft Dynamics® AX

*Design and deliver custom documents from Microsoft Dynamics AX output*

The Create!form product suite for Microsoft Dynamics AX – featuring Create!form Designer® and Create!form Director™ – is a powerful, next-generation electronic forms solution for formatting, personalising and delivering ERP application output. A true enterprise-class application, Create!form converts standard Microsoft Dynamics AX output into more attractive, functional and efficient documents that can then be distributed via print, fax, email and the Web, or stored in a digital archive.



## Why Create!form for Microsoft Dynamics AX?

### Reduces operational complexity and resource requirements

Optimised for Microsoft Dynamics AX environments, Create!form supports a faster, more cost-effective implementation of your AX system. Starting from the point of initial implementation, the footprint of Create!form's installed components within AX is minimised in order to prevent conflicts with previous report customisations and other ISV applications. Further improving the speed and ease of installation for customers, especially for multi-site implementations, is the ability to share global configuration options across multiple company accounts.

Create!form's ease-of-use extends to the application interface as well. When producing reports Create!form shares the same AX user experience, allowing end-users to work within familiar screens for maximum efficiency with minimal training. When report customisations are needed, Create!form's convenient 'drag & drop' design tool allows even non-technical staff to tailor reports without relying on expensive, third-party resources for X++ programming support. Reducing the need for these resources places ERP-generated document processing firmly within your control and reduces the costs to maintain and upgrade your AX system.

### Improves report management and system administration

As organisations migrate to newer versions of AX, they quickly realise the costs associated with maintaining report customisations created in previous versions. As an alternative to code re-customisations, Create!form utilises XML tags to detect and appropriately route previous customisations through the application, allowing customers to complete their upgrades in less time and at less cost by eliminating the need for report recoding.

Create!form also supports efficient modifications to your larger enterprise infrastructure by enabling a highly-controlled process for IT production updates. These include unattended scheduling and deployment of application changes, as well as unattended batch report processing, affording AX customers greater scheduling flexibility and reduced reliance on staff to monitor after-hours system changes or large-volume output jobs.

## Benefits of Create!form:

- Compose more professional-looking business documents, including invoices, MICR cheques and purchase orders
- Reduce reliance on external consulting services for document output design and delivery
- Dynamically tailor logos, languages and marketing messages
- Enable international business transactions with support for double-byte characters
- Decrease postage costs by migrating to electronic delivery channels
- Eliminate the need for costly pre-printed forms and custom cheque stock
- Automatically repaginate output to conserve printed paper and reduce PDF file sizes

### Strengthens system security and reliability

In this environment of increasing regulatory pressure, organisations are seeking new ways to strengthen their internal security controls and demonstrate greater process transparency to support compliance mandates. CreatelForm addresses the need for improved transactional document and payment security by leveraging the native Microsoft Dynamics AX user and group security settings to restrict specific user roles to certain delivery methods and output destinations, whether print or online.

### Enhanced communication and accessibility

When working within a global network of employees, customers and partners, CreatelForm makes it easy for organisations to communicate and maintain document-centric business processes by supporting complete text localisation for the most popular worldwide languages. And given CreatelForm's expanded integration with Microsoft Enterprise Portal, even non-traditional ERP users can view the same CreatelForm-enabled reports available within AX via a convenient Web browser, making business-critical reports available anytime, anywhere.

### CreatelForm Designer for advanced document composition

Part of the CreatelForm product suite, CreatelForm Designer enables the creation of dynamic invoices, cheques, purchase orders, bills of lading and other documents, without complex AX programming or application changes. With CreatelForm Designer, users can add logos, graphics, barcodes, signatures, colours, fonts and conditional logic to AX reports. The intuitive graphical design interface empowers even non-technical staff to design forms, giving control to those who understand the document and business needs best.

To customise reports, select the data to be mapped from the original AX output and drag it to the desired location within the new design. customise font, size, colour, shading, orientation/rotation, justification and more. Document sets, or individual documents within a batch run are easily defined by flagging a change in value, a page delimiter or any other customisable data condition within the output file.

### CreatelForm Designer features

**Live Preview** – CreatelForm helps to shorten the implementation cycle for report changes by quickly producing proofs of the modified output for review and approval. As data is mapped from the source file to the new document, CreatelForm automatically displays new content on-screen, including all customised elements. To save time and streamline form design, the user can scroll through the source file sample and see instantly how the varying data affects the custom output.

**Design Templates** – CreatelForm Designer comes standard with a variety of templates including: invoice, PO and cheque.

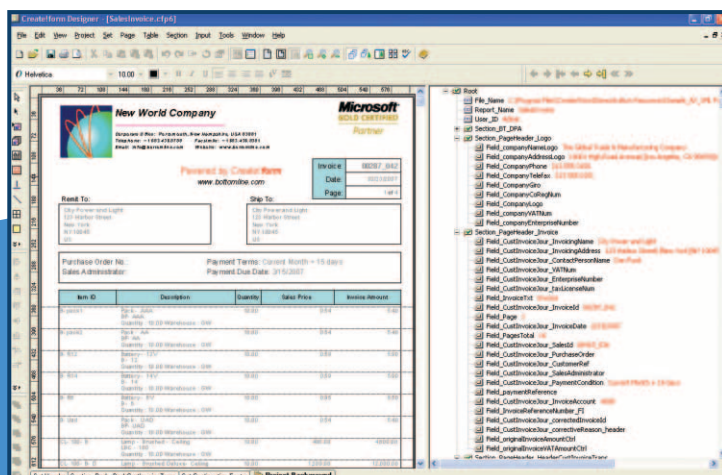
**Barcode Insertion** – Users can implement static and dynamic barcodes from a variety of standards in purchase orders, inventory pick slips and other documents. Barcodes may be assigned as a static value or can derive a value from variable data within Microsoft Dynamics AX. CreatelForm Designer automatically calculates the associated check digits, guards, and start and stop codes.

**Conditional Design Logic** – Allows users to manipulate report data and personalise document output formatting based on specific audiences and delivery preferences. Data may be added or suppressed, and design elements including logos, site addresses, barcodes and marketing messages can be customised by recipient, all without requiring changes to the original AX report.

Variable subforms can also employ conditional logic. Subforms can be created and dynamically linked to any number of master forms, and are typically employed for frequently used information such as logos, addresses or signatures. Subforms can be placed in any position or size on the master form and can be rotated in any direction. When the time comes to change an address, fax number or logo, simply update the shared subform and all linked CreatelForm output is instantly updated.

“CreatelForm belongs in every single AX implementation. When our customers find out the time they can save creating AX custom documents and implementing multi-channel delivery, then CreatelForm simply sells itself. The ‘drag & drop’ GUI lets our customers’ own IT staff take full control over the entire document design and delivery process. This is an exciting AX-complementary piece of software.”

Darrell Smith  
Microsoft Certified Business Management  
Solutions Specialist  
Agility Business Solutions



CreatelForm Designer's easy-to-use graphical interface allows non-technical users to assign variables and customise standard AX output in a single step.

**Document Repagination** – Dynamically adjusts document length by repaginating output based upon incoming data. This feature leads to reduced file size, email attachment size, archive size and fax delivery charges. Document repagination functionality includes:

- Automatic processing and accounting for repeating line-item data
- Full document repagination
- Document set-based repagination
- Autosizing of page sections to minimise excessive white-space

**Database Look-up** – Assign variables from within Create!form Designer to add data from external sources to the output stream. Once the variable is named and the database field from which it will be pulled is indicated, the variable can be inserted anywhere in the document.

**Image Server Utility** – Create!form’s Image Server utility automatically converts .jpg, .gif and .tif files into subforms ready for dynamic inclusion in formatted documents. This utility streamlines the process of adding items such as product images, scans and signatures into documents.

**Data Calculations** – Use Create!form Designer’s expression builder and user variable functions to add data calculations to document output. Perfect for items such as page sub-totals in repaginated documents, tax rate conversion and more.

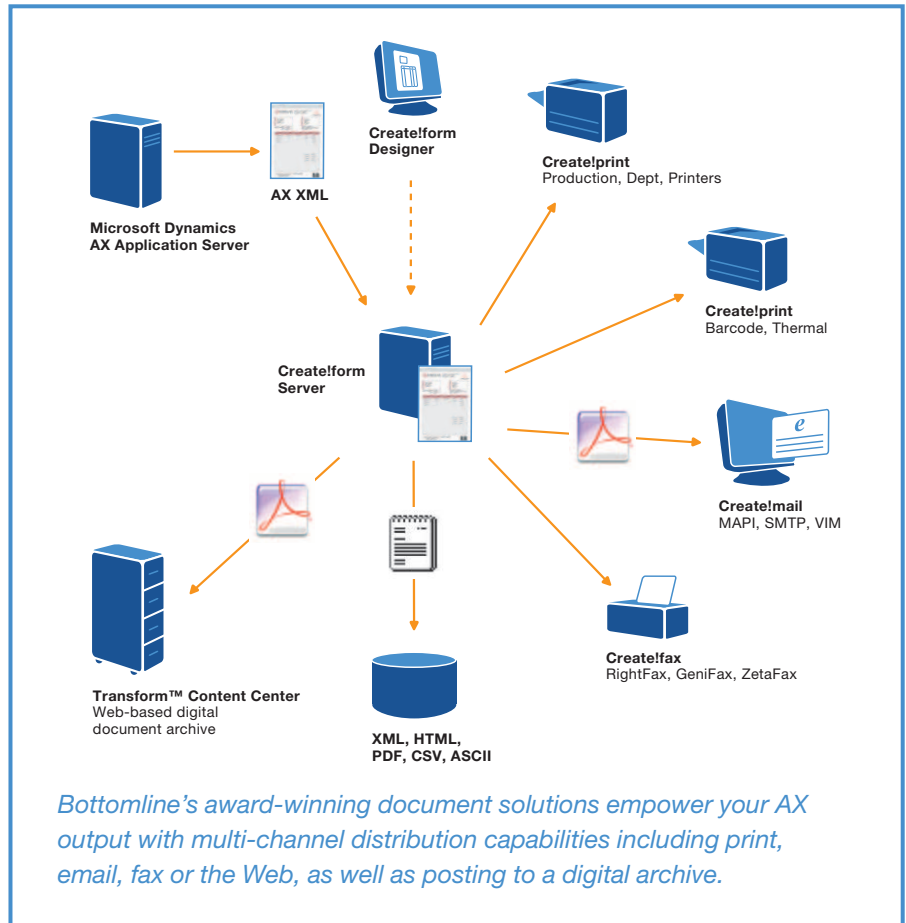
**Dynamic Page Insertion** – Dynamically insert pages from external applications using EPS format conversion.

**MICR Cheque Printing** – Create!form Designer lets users accurately map and output MICR data using the optional Create!micr™ module eliminating the need for costly pre-printed cheque stock.

**Intelligent Tables** – Create!form’s intelligent table capability allows the sorting of line-item output by product number, product name, weight or another specified data variable without making changes to the application, as well as dynamic sub-totalling on page breaks and groups.

### Create!form Director for automated document delivery

Create!form Director is an easy-to-use application allowing users to define the transactional document or process workflow of their application output. Using this solution, organisations can significantly improve the efficiency of their business document distribution based on the recipient’s preferences, converting manual distribution processes into automated electronic processes.



Create!form Director enables administrators to define, route and deliver documents to their point of need for automated printing, faxing, emailing, archiving or electronic payment. The easy-to-use tool set helps users configure rules that trigger the splitting of a single large file into numerous documents, extract data from documents for other applications to use, and distribute documents to multiple queues and locations without modifying existing AX code.

### Create!form Director features

**Point-and-Click Expression Building** – Replaces time consuming X++ coding with simple, point-and-click expression building.

**Output Destination Management** – Direct multiple copies of documents to email, fax, archive or networked printer(s) according to document content or business-defined rules.

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

## Document and Data Handling Functions

- **Split** spool files according to user-specified rules or variables such as invoice number, cheque number, state/province or country.
- **Deliver** collated or uncollated documents to the same location or to a secondary one. For example, users can archive copies of invoices on the finance server and then print copies of payment records on the local printer.
- **Distribute** split or copied documents to any output queue based on conditions within the data. For example, direct pick slips straight to the warehouse and deliver invoices to the electronic archive.
- **Sort** and reorganise documents, such as sorting based on mailing region, within a job for more efficient distribution.
- **Transform** input data into any ASCII-based output format (i.e. ASCII, CSV, XML, HTML, etc.) from within Create!form Director. Use this feature to create and deliver data to update databases, assemble detailed audit reports, print to line printers and export data to other applications.
- **Group** related, yet independent documents and append them to a single PDF for preview and batch delivery.
- **Send** output directly to FTP and HTTP destinations.
- **Database Update** (Optional) – Defined Create!form workflows can include the addition and modification of application databases via ODBC connection using any defined data or user variable. The database update feature is ideal for applications requiring address verification, mail sorting, audit databases and data carried over separate print jobs.

## Create!form Server and Output Destinations

### Runtime Operation

After the form design is completed and logic is added to each document using Create!form Director, the project is transferred to the Create!form Server using the Tools/Transfer menu within Create!form Director. Create!form Server can run on any Windows 2000/2003 server and handles all job requests sent to the printer queue as a back-office operation. An efficient and effective 'traffic cop,' Create!form Server determines where your Create!form-enhanced application output will be delivered based on Create!form Director business-defined rules.

Seamless integration with the Windows spooling environment allows direct access to the print queue properties and document handling options. Documents in error are held on the print queue and can be restarted once the problem is identified and corrected.

## Output Destinations

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

### Transactional document destination modules

- **Create!email**<sup>®</sup> – Emails document output automatically to recipients in real-time as a PDF attachment, embedded PDF hyperlink or email body text.
- **Create!fax**<sup>®</sup> – Integrates with fax server software to deliver documents to a fax destination, using fax number retrieved from the base document or an external ODBC database reference. Cover sheet content can be personalised to the recipient.
- **Transform™ Content Centre** – A digital archive of all your final documents. This includes full indexing, search and retrieval capabilities presented on the Web for easy access.

### Transactional payment destination modules

- **Create!form ACH** – Works with Create!form Director to provide secure, NACHA-compliant, electronic payment transmission for business-critical vendor and employee payments.
- **CheckDefense™-SP** – Advanced Positive Pay technology to protect your MICR cheque printing environment from cheque fraud.

## System requirements

For complete details on the hardware and software platforms required and/or supported by Create!form, please email [emea-info@bottomline.com](mailto:emea-info@bottomline.com).



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