

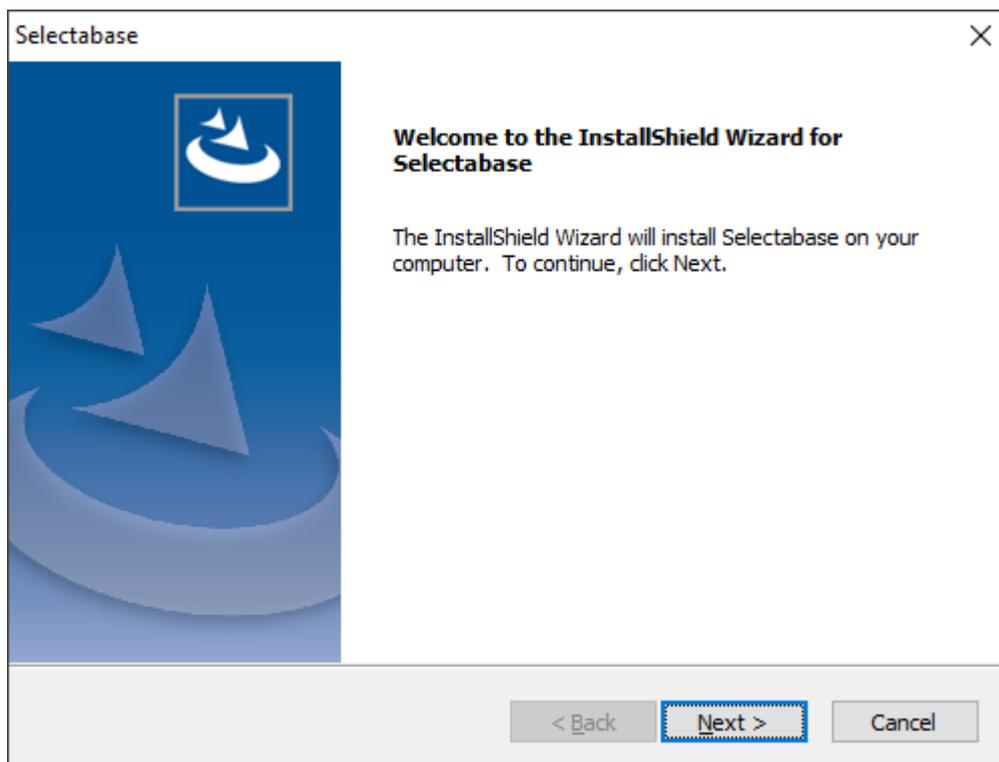
User Guide

Selectabase Print Driver

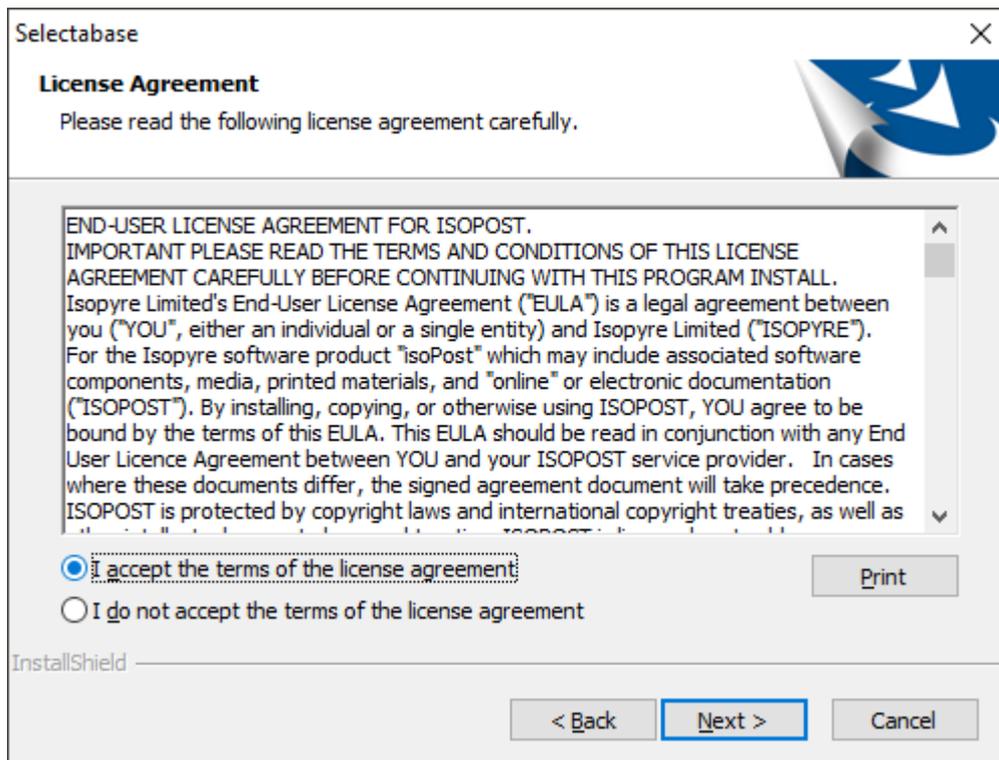
Welcome to the user guide for the Selectabase Print Driver. This guide will walk you through the installation, setup, and usage of the print driver to ensure smooth operation.

Installation:

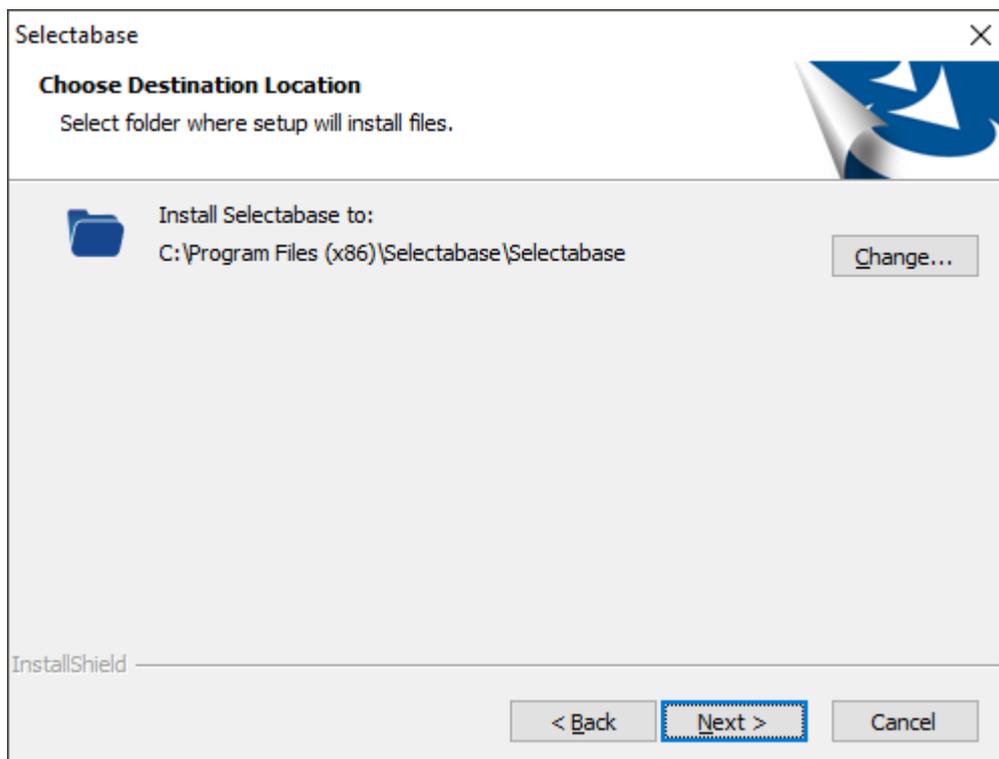
After purchasing, you will receive a download link via email. Click on the link to download the print driver file to your computer. Once the download is complete, locate the file (usually named `selectabase.exe`). Double-click the file to begin the installation process.



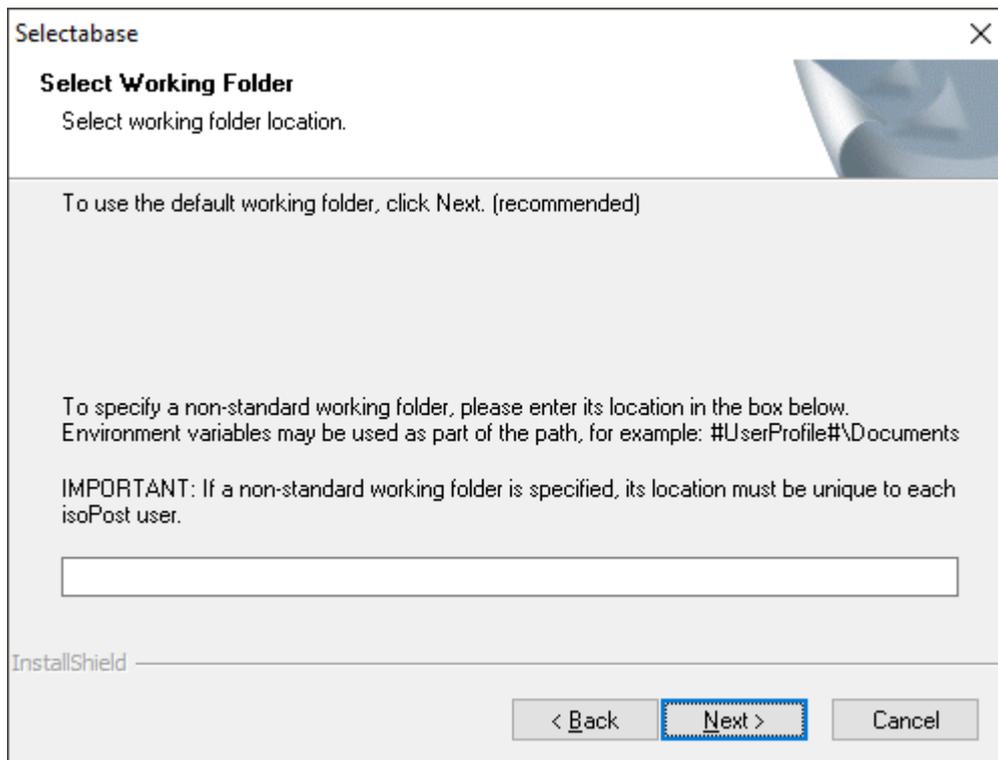
1. Click Next to continue



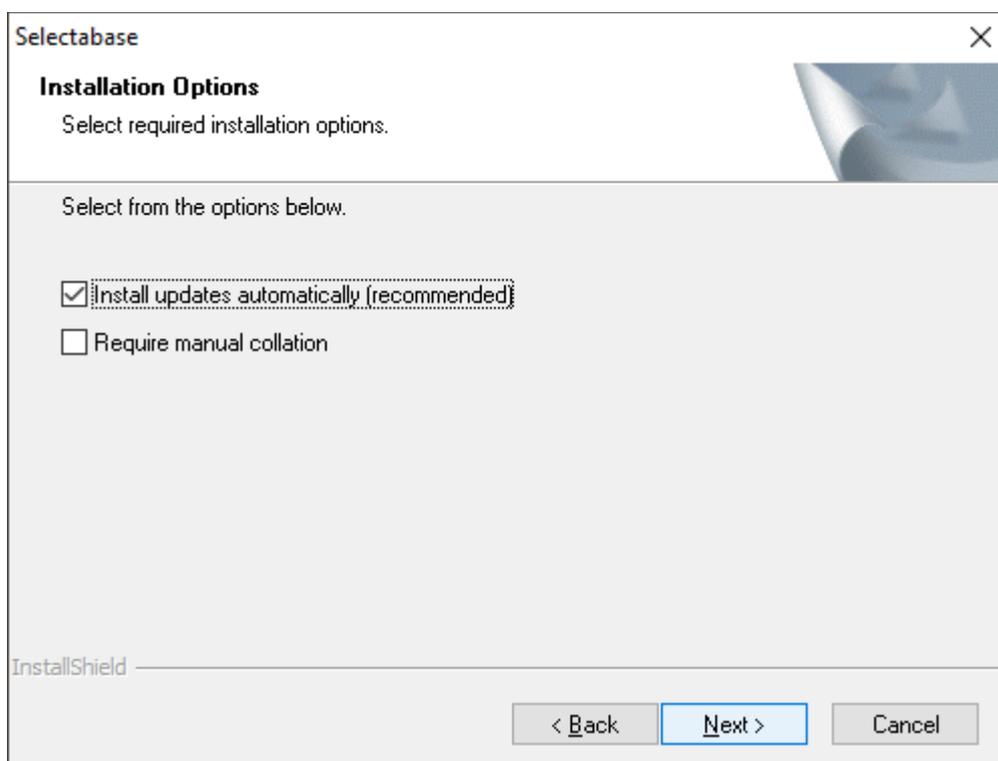
2. You must accept the license agreement and click Next.



3. Select a destination location for the Selectabase Client to be installed. It is usual to leave this set as the default installation path. Click Next to continue

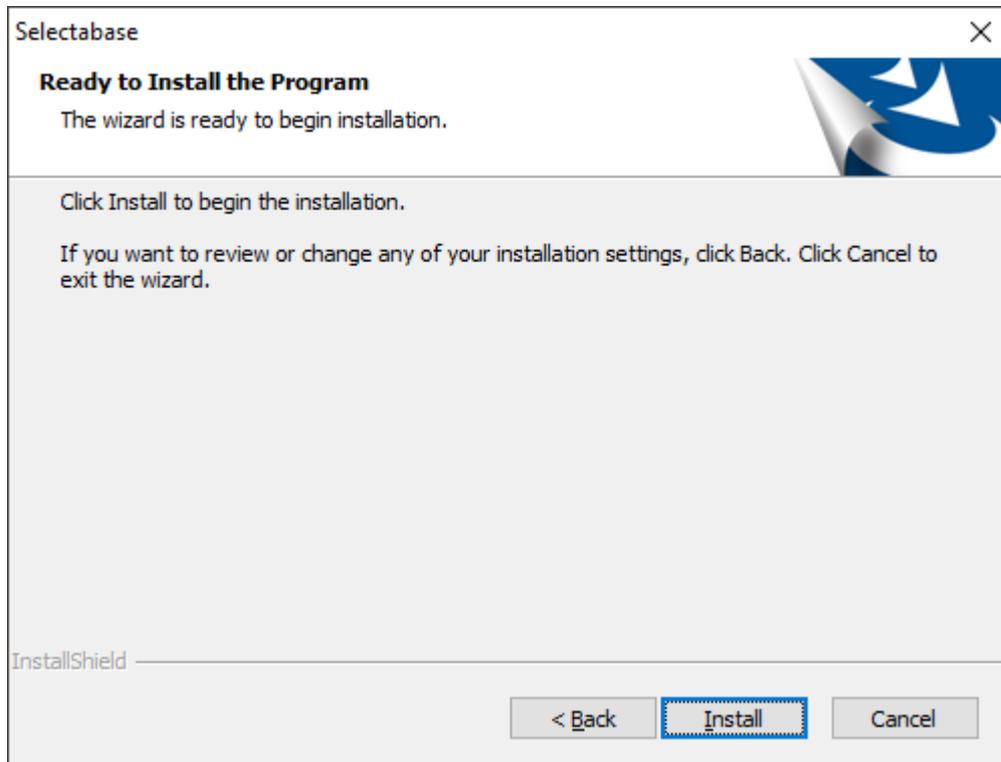


4. The Selectabase Client requires a working folder which is unique for each user. By default, this is the user's 'temp' folder and usually doesn't need to be changed.

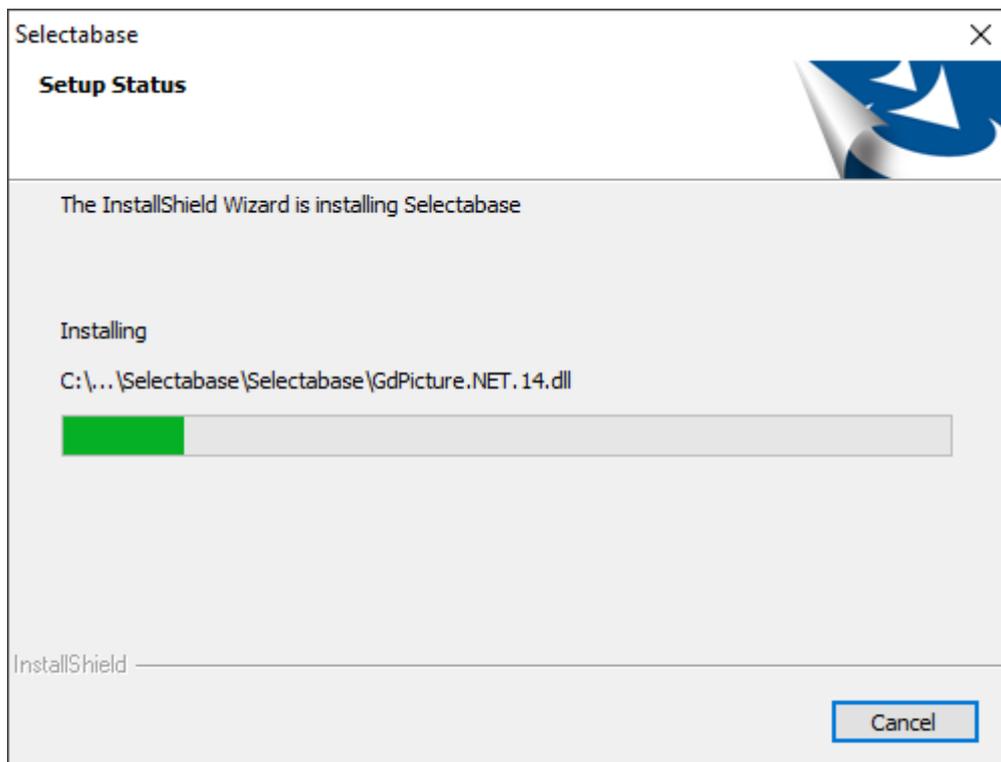


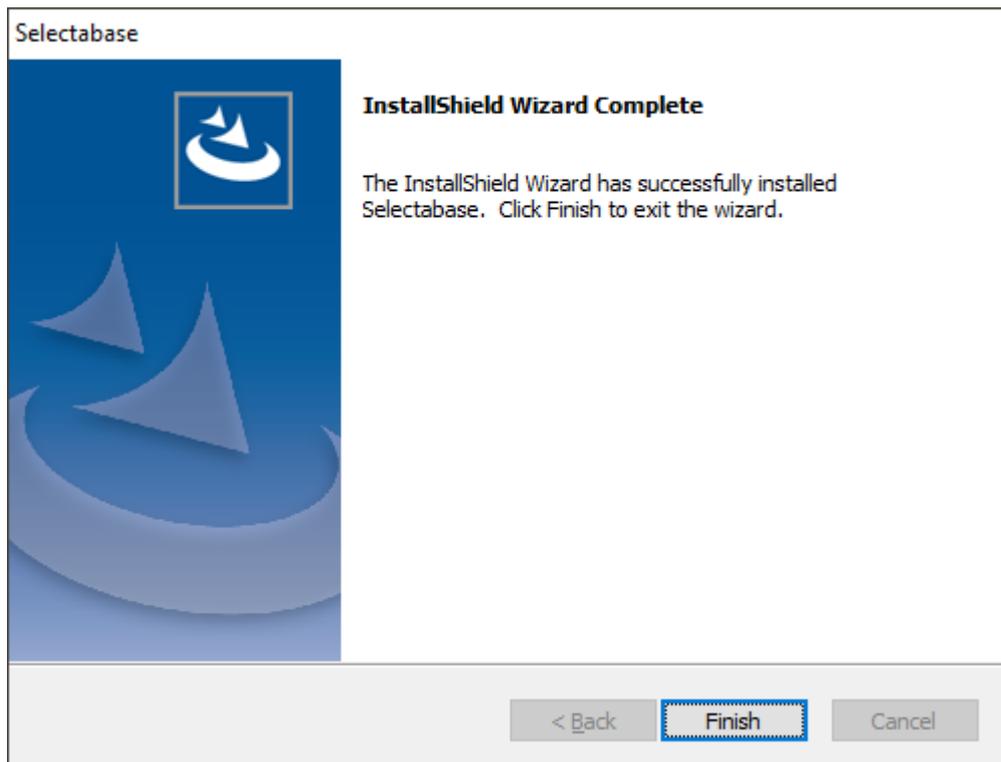
5. Select from some additional installation options.

- Select whether you want the Selectabase Client to automatically install updates when new versions are released (not available for multi-instance installs).
- Select whether you want the Selectabase Client to collate multiple document submissions into a single submission. This is useful when integrating with automated systems. See Document Collation Mode for more information



6. If you are happy to proceed, click Install

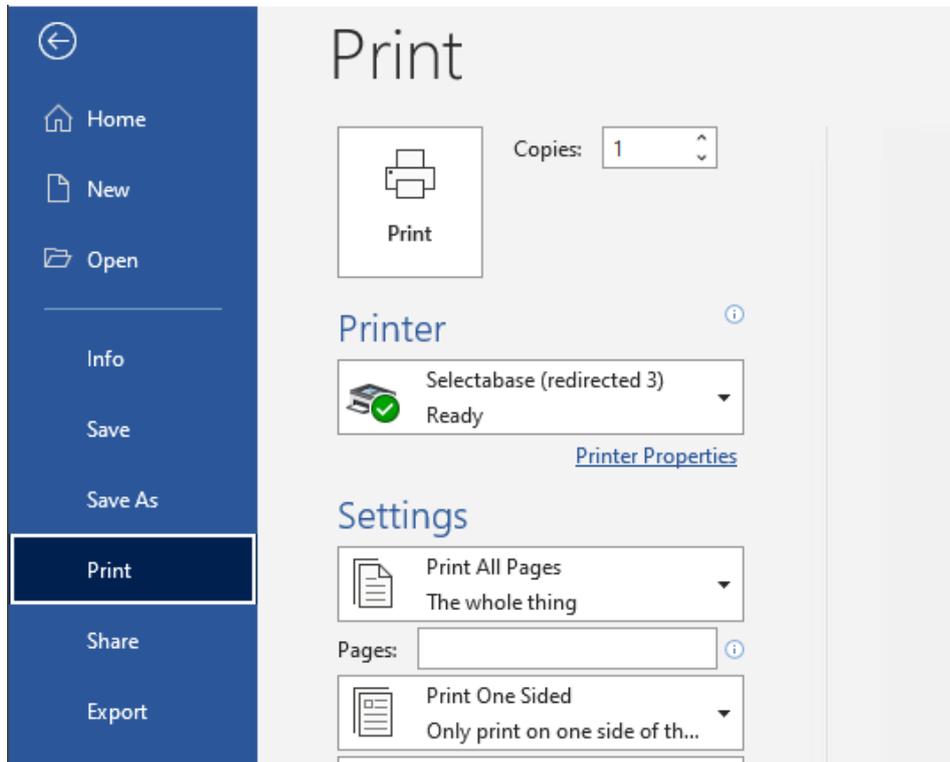




7. Click Finish to complete your Selectabase Client Installation.

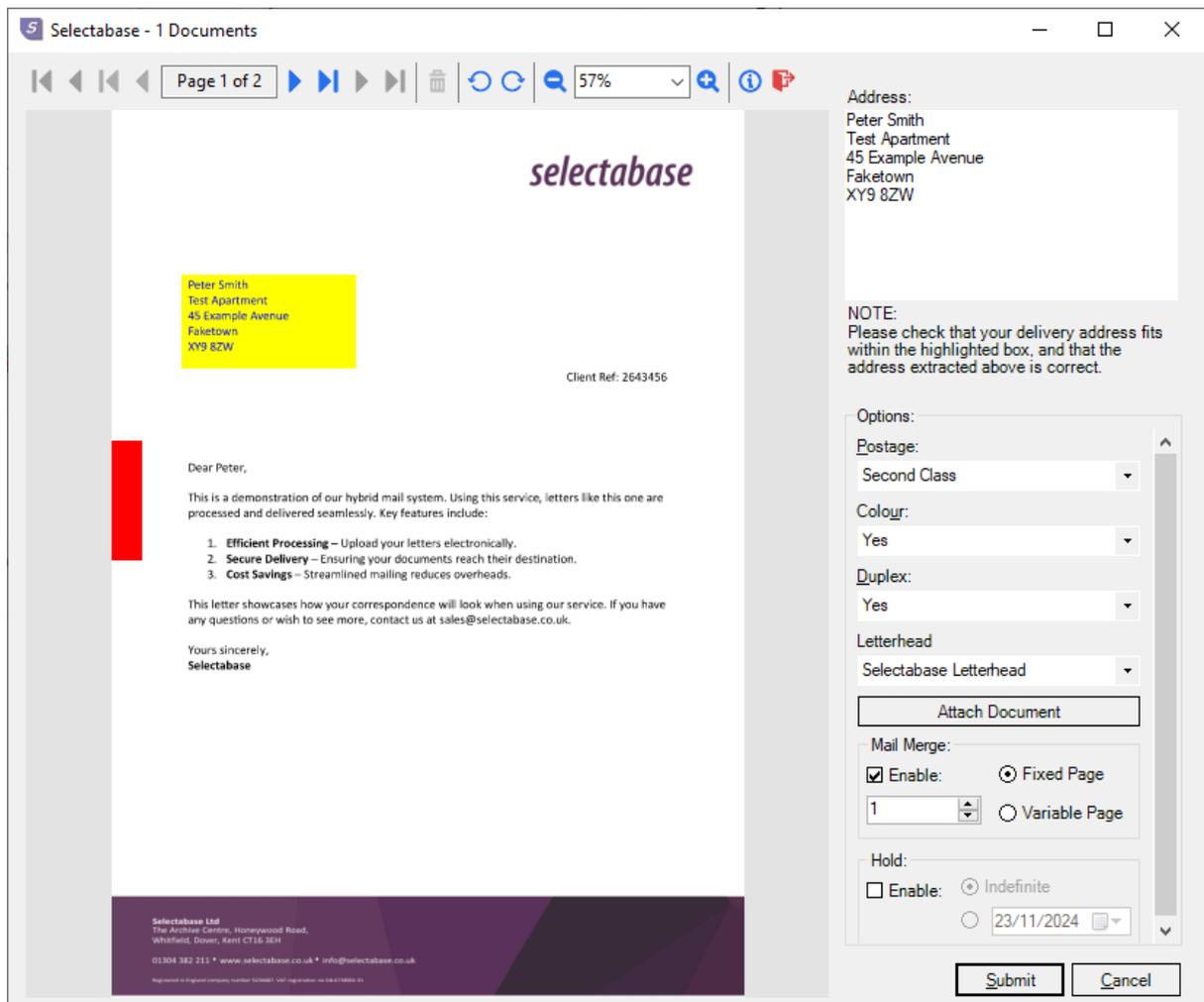
Using Selectabase Client

To send a document using the Selectabase Client, the document should be created in the same manner as if printing to a normal desk top printer. Standard document creation tools can continue to be used (such as Microsoft Word). To print to Selectabase, follow the instructions below (all examples are from Microsoft Word): - 1. When the document has been designed and is ready to print, select print from your application. The example below is from a Microsoft Office application.



2. Click Printer, ensure that the Selectabase Printer is selected. Select the required page numbers and when happy with the selection click Print.

3. The Selectabase Client preview will be displayed allowing you to choose further options about how the document will be printed as well as mailing options (see Fulfilment Options sections) Some of the options shown below may not be visible, the options available are dependent on your configuration.



4. Ensure that the delivery address is clearly within the highlighted area and that the address details have been extracted successfully. If the address position needs to be modified, hit the Cancel button, and change the document appropriately. See Address Window section for more details.

Peter Smith
 Test Apartment
 45 Example Avenue
 Faketown
 XY9 8ZW

5. Ensure that no document content is present in any Exclusion Boxes shown on the preview. These areas are used as part of the document production processes, as such you should not use these areas.



6. Once all the necessary options have been selected, hit the 'OK' button. Once the document has been submitted, you will be returned to your original document.

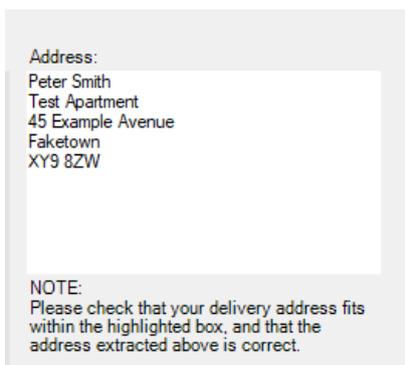
Address Window

For the document to be correctly mailed, the address of the recipient must be within the highlighted area of the document preview: -



This is the area of the document that can be viewed through the address window of the envelope. Sometimes there may be a region around the envelope window which must be kept blank for postage reasons. This area will be shown in grey, and your document cannot be submitted if anything is present in this area.

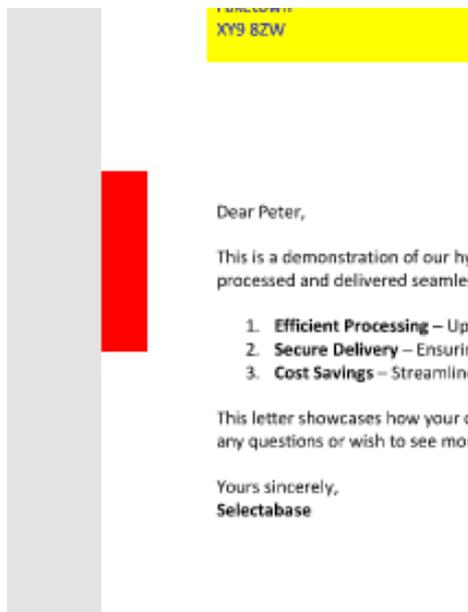
The Selectabase Client will read the information contained within the envelope window position and display it at the top right of the preview: -



Ensure that the address is correct in this box before submitting the document as this is where the document will be posted to.

Exclusion Box

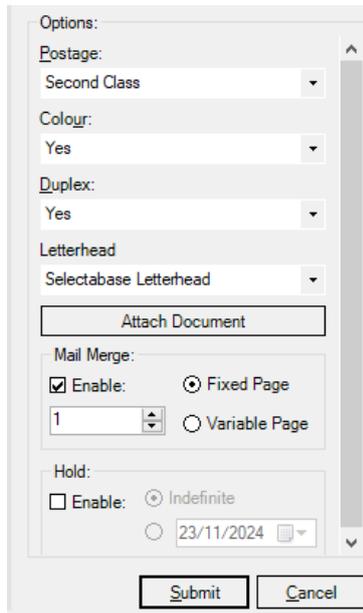
For the document to be correctly produced, it is sometimes necessary to add barcodes and sequence numbers to the document. The areas where these items will be printed are shown on the document preview: -



Placing document content in these areas can cause issues with print and fulfilment, therefore the Selectabase Client will not allow you to submit documents which contain text in these areas.

Fulfilment Options

Several fulfilment options are available on the print preview. Some of these options may not be visible dependant on your license.



The image shows a dialog box titled "Options:" with several sections. The "Postage:" section has a dropdown menu set to "Second Class". The "Colour:" section has a dropdown menu set to "Yes". The "Duplex:" section has a dropdown menu set to "Yes". The "Letterhead" section has a dropdown menu set to "Selectabase Letterhead". Below these sections is a button labeled "Attach Document". The "Mail Merge:" section has a checked "Enable:" checkbox, a radio button selected for "Fixed Page", and a dropdown menu set to "1". The "Variable Page" radio button is unselected. The "Hold:" section has an unchecked "Enable:" checkbox, a radio button selected for "Indefinite", and a date dropdown menu set to "23/11/2024". At the bottom of the dialog are "Submit" and "Cancel" buttons.

Postage

This option allows you to select from the available postage options we offer. Select the appropriate option from the drop-down menu on the right-hand side of the screen.

Colour

This option allows you to select from Black & White or Colour. Select the appropriate option from the drop-down menu on the right-hand side of the screen

Duplex

Duplex printing is where a document is printed on both sides of the paper. Selecting 'yes' makes multiple page documents print on both sides of the paper, therefore using less sheets of paper. Selecting 'no' makes multiple page documents print on the front side of the paper only, therefore using more sheets of paper. Select the appropriate option from the drop-down menu on the right-hand side of the screen

Mail Merge

The Mail Merge feature allows you to submit documents that have been through the Microsoft Word (or equivalent) Mail Merge process. This allows you to submit multiple

documents in one go, for example if you are doing a mailshot to multiple addresses. The default behaviour of the Selectabase Client is to place all pages of your document into a single recipient envelope. With the Mail Merge feature, you can decide to break up your document into multiple envelopes. When you do a Mail Merge in Microsoft Word, the document produced contains all the individual documents one after another. Check the Mail Merge option to turn this feature on. Then select the number of pages in each document.

Variable Page Mail Merge

The Variable Mail Merge feature allows you to submit documents that have been through the Microsoft Word (or equivalent) Mail Merge process and are of a varying number of pages. The default behaviour of the Selectabase Client is to place all pages of your document into a single recipient envelope. With the Variable Mail Merge feature, you can decide to break up your document into multiple envelopes. When you do a Mail Merge in Microsoft Word, the document produced contains all the individual documents one after another.

Check the Variable Mail Merge option to turn this feature on. You will then be presented with a new toolbar.



Using the draw tool, select a region on the page which determines the start/end of the document. Build up the logic statement to control how the pages are treated as documents.

Document Hold

The document hold feature allows a user to place a document into a hold state when it is submitted. This can be used to facilitate an approval process or simply to delay the processing of the document until a specified date.

Check the Hold Enable option to turn this feature on. You can then choose between the following options:

- Indefinite Hold - This will require someone to release the document via the Web Portal before it can be processed.
- Hold Until Date - Use the date picker to select when the document should be automatically released.