

Improve business communications with PDF by email

by Paul Crawley, Business Manager, PDF solutions



Introduction

Have you ever downloaded a PDF file from the internet or received one as an email attachment? The fact that you're reading this white paper in PDF format means that you are almost certainly one of the 500 million people that regularly uses the free Adobe® Reader® software.

PDF files are pervasive in most email inboxes and on company networks, whether it's product brochures, proposals, invoices or newsletters. PDF brings the experience of the full-color glossy printed page to life on the reader's screen, and at a fraction of the cost of mailing a printed document!

So with PDF files in common use, and a huge installed base of users using the free reader software and ready to receive PDF files, why is it that only a fraction of us have the capability to create and send PDFs?

The fact is that, for many businesses, PDFs are files that are created and used in a certain business area, more often than not the marketing department. And, 10 years ago, the same was true of businesses' web sites, which were no more than electronic product brochures. As the World Wide Web has transformed the way businesses interact with their customers, when combined with your email system, PDF files can have a major impact on the way you do business – with startling results.

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This document examines network-capable PDF solutions that can offer PDF creation capabilities to all network users, and can integrate PDF with other software packages such as email, accounts and CRM systems. These solutions not only save businesses time and money, but create electronic documents with impact that results in a competitive edge.

The email dilemma

The importance of email is impossible to deny. It gives obvious benefits to businesses, such as immediacy of delivery, zero cost per message, and the ability to send messages directly to one or many recipients. In recent years, email has evolved and so has its usage, so much so that it is no longer an ad hoc communication method.

In a survey by British research and analysis company Quocirca Ltd., more than 80% of respondents viewed email as critical or extremely important for external communications with customers, suppliers, and business partners. Email, the survey concluded, is where 'mission criticality meets personal interest.'¹ However, when it comes to preparing and delivering business documents via email, businesses have a three-fold dilemma.



First, business documents come in many forms and file formats. Few recipients want to receive emails with multiple attachments in formats they cannot open or view.

Second, businesses want the assurance that documents sent electronically cannot be unknowingly modified by the recipient. In other words, your electronic document, should offer the same properties as a paper original.

Third, to preserve the company image, it is critical to ensure message clarity and consistency. Will the recipient view my documents in the correct order? Should every sales proposal be sent on company stationery?

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The challenge for businesses, therefore is to create and deliver information that is consistent yet secure, expediently but effectively, and in the client's preferred medium. Increasingly, that medium is email, and one of the most useful methods for creating and delivering email-ready electronic documents and avoiding the problems described above is to create PDF files.

The PDF advantage

Invented by Adobe Systems in the early 1990s, the growth in popularity of the PDF format is no fluke. PDF files offer several advantages over native documents, such as Microsoft® Word and Excel® files that are sent as email attachments.

Firstly, as fonts can be embedded directly into a PDF document, and the Adobe Reader software is supported across many platforms, a PDF always retains the original look and feel when viewed or printed, irrespective of the platform it is viewed on or printed from. What is more, the information contained in a PDF file relates to the presentation of the document only, in other words, it is not possible to transmit viruses or other harmful files to other computers.

Secondly, security can be applied to PDF documents to prevent them from being edited, printed or opened without a password. This not only gives the sender control over the distribution and readership of the document, but brings peace of mind – especially if the document is a legal or financial one.

Finally, certain PDF creation tools allow multiple documents to be merged together, irrespective of the application that created them. Merging PDF files can be performed by adding pages from one PDF document to an existing PDF document, as well as by overlaying one document on top of another, in a similar way branded stationery such as a letterhead is used for printed materials.

¹Email: Business or Pleasure? An independent study by the primary research division of Quocirca Ltd., June 2004

Merging is a powerful and popular function of PDF that allows the creator to enhance the look and feel of their PDF document, and to present their message in their way by specifying a particular page order.

Table 1: How PDF can address common email dilemmas

Email dilemma	PDF advantage
Incompatible file formats	PDF offers a way of keeping the look and feel of the original document intact, irrespective of the computer the file is viewed on.
Concerns over document security	Document permissions, encryption and password protection can be applied to PDF documents meaning that they can't be amended.
Consistency and message clarity	PDF merging can be used to enhance the look and feel of PDF documents and to manipulate page order.

The benefits of using PDF files are clear, but in order to be an effective part of a business communications portfolio, PDF software must be capable of meeting several basic requirements.

Choosing PDF software: avoiding the common pitfalls

If simple PDF creation is required, there are plenty of cheap – even free – PDF creators. But PDF technology by itself does not provide a way for businesses to make the most of electronic document delivery, particularly in environments where business process automation is needed, yet personalized communication is imperative.

As a bare minimum, PDF software must provide fast and reliable format conversion as well as a client and previewing functions. In addition to these basic requirements, there are several other important requirements to consider.

- Desktop users need versatility and ease of use – an intuitive user interface with a rich feature set that minimizes the need for training and support. A PDF solution should work the way users work.
- IT managers require ease of deployment and management – a set of tools to manage and audit usage from a single, central location. This is best achieved through a system that is networked.
- Integration with other software applications, such as CRM and accounts software can offer the benefits of PDF in key business applications and business processes such as sales order processing and credit control.
- These requirements are best delivered by established suppliers with an excellent reputation for customer service and a support network to help ensure a long term return on investment. In short, they should be innovative and show a commitment to ensuring their solution continues to adapt and meet changing business needs.

Network PDF software best satisfies the requirements of the entire organization when it comes to preparing and delivering business documents via email. These solutions achieve this by offering a comprehensive feature set, dependable operation and ease of use. In addition, they are simple to deploy, have lower maintenance and are capable of adapting to changing business needs.

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Building business documents with speed

Creating, delivering and recording documents via email using network PDF software should be utterly simple. To create PDFs from Microsoft Word, for example, users should have the ability to work from the original document and convert it to PDF with a single mouse-click.

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As an option, and as part of the sending process, the PDF software should offer users the ability to preview and control the appearance of the final document before it is sent – for example to merge onto company stationery or to append other documents.

Finally, immediate distribution to one or many recipients by addressing emails manually or by selecting from their Microsoft Outlook® address book should be offered.

The process is similar to many paper processes, such as printing a letter on company letterhead paper and inserting a printed brochure. The difference is that creating documents in this way can be done from the desktop, with instant delivery via email.

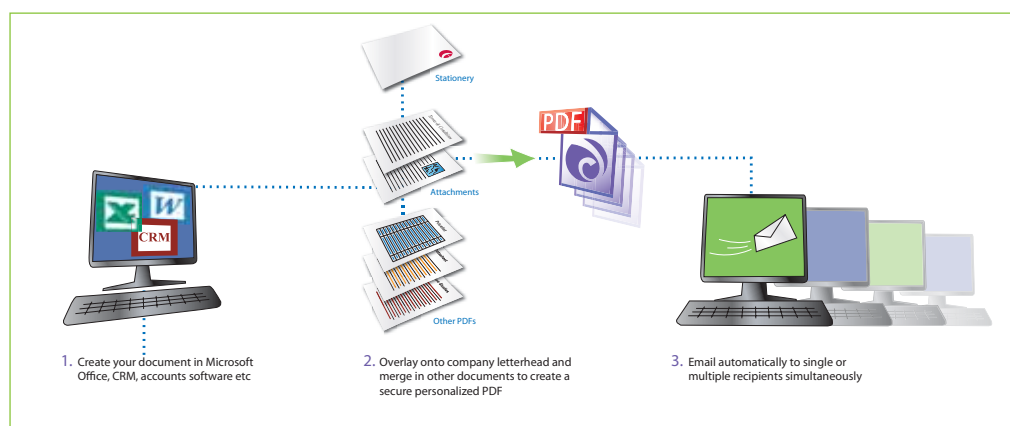


Diagram 1: Network PDF software should excel at creating business documents with ease and delivering them instantly using your email system.

Building business documents with confidence

Prior to emailing a PDF document, the PDF software should offer the ability to create the document with a number of security features built-in. Being able to specify a password to open the document, to disable printing or extracting content guarantees the integrity of the document and offers peace of mind.

The conversion process to PDF ensures that any hidden and potentially harmful information contained within the document, known as meta data, is removed prior to sending. Meta data includes change histories, undo actions, names of contributors and other information that Microsoft Office applications place in the document for control and management.

Finally, after the document is sent, a copy should be automatically saved on the network

or as an option in a CRM or document management system. Such an audit trail allows any network user to retrieve copies of all sent documents from a single, central location. While helping with certain regulatory and compliance issues, the ability to retrieve PDF documents quickly on screen can also help to improve customer service.

Building business documents consistently

Network PDF software is designed to go several steps beyond simple PDF creation. Standard documents such as company stationery, quotation forms, invoices, and proposals are networked and therefore can be defined, stored, and shared among network users from a central location. Separate documents can be taken and combined into a single PDF.

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Network PDF software should be capable of integrating with existing business applications, including accounting and customer relationship management programs. This offers users the ability to create personalized documents for multiple recipients and email them using the output from a document mail merge or report writer.

An application programmer's interface (API) should offer automated control over the appearance of the final document. Specific actions, such as 'overlay onto company stationery', 'send to multiple recipients', 'send by fax and email' can then be included in document templates that are always followed by the PDF software.

In a sales environment, for example, this means that every time a new quotation is created, it is processed in exactly the same way; perhaps overlaid on company letterhead and with conditions of sale attached, regardless of who created the document.

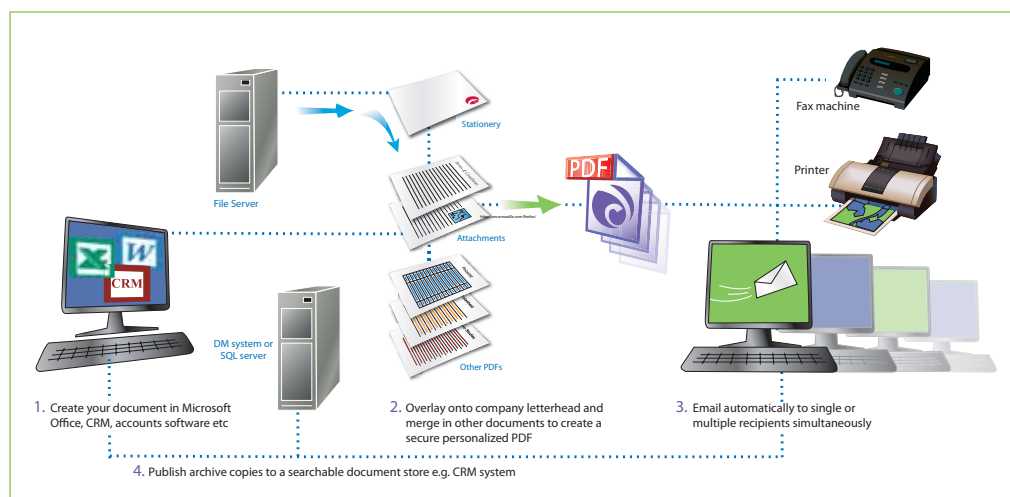


Diagram 2: Network PDF software should fulfil the PDF requirements of the entire organization and be capable of adapting to changing business needs.

Empowering all network users

While the best PDF solutions offer end-users a rich feature set combined with ease of use, the issue of deployment and ongoing support for IT managers cannot be ignored.

A true multi-user solution should be capable of being deployed centrally, meaning that it can be installed on and updated on every user's desktop remotely from a central point - a key benefit for companies with a large user community.

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key benefit for companies with a large user community. Usage should also be capable of being managed centrally, making it is simple to enable or disable user accounts.

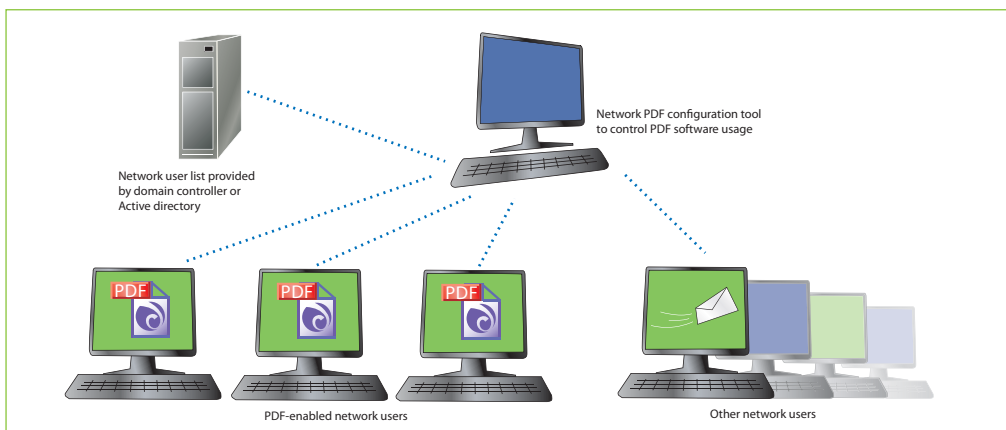


Diagram 3: Network PDF solutions enable PDF usage to be controlled centrally

Conclusion

Email has undoubtedly become the preferred method of customer-facing communications for businesses large and small. However the need for users to create and deliver secure, professional looking email communications that present a consistent corporate image has never been more important.

Combining email with the best of PDF addresses these needs. However, when choosing PDF software, it is essential to consider whether the solution will enhance communications for all network users and will integrate PDF with other software packages, such as email, accounts and CRM systems.

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Network PDF solutions are capable of providing these benefits, and can both save businesses time and money, and offer the versatility required to ensure that changing business needs are met.

About Zetadocs PDF



Zetadocs® is the leading network-only PDF solution. It helps network users create, deliver and share electronic business documents. These documents can be produced from virtually any Windows® application. The simple to use user interface allows users to combine multiple documents to create a single PDF file that can be merged to company stationery and sent across mixed media: email, fax, or to a shared network printer or folder.

Commonly used documents, such as product brochures are stored centrally and can be applied automatically. Sent documents can be saved to a central document archive, CRM application or document management system for fast retrieval of historical customer data.

Zetadocs can eliminate many of the costs associated with document production and delivery. The business documents it produces have a consistent look and feel, and can be shared with other users, enhancing customer service.

Zetadocs is designed for use right across businesses – in sales, marketing, finance, operations and customer service teams. It brings improvements in productivity, efficiency, compliance and quality control.

About Equisys

Equisys provides software packages for document production and delivery. It is renowned for products that are reliable and easy to manage and has 60,000 customers of all sizes in over 100 countries, including Barclays, Eli Lilly, Best Western and Coca Cola. Its award-winning network fax software, Zetafax[®], is well established as the leader in its class and is supported by a global network of partners.

In May 2005 Equisys launched Zetadocs PDF, software that creates and delivers personalized PDF documents from Microsoft Windows applications. Zetadocs PDF is designed to work with a large line of business systems such as CRM, ERP and accounts packages. It saves companies time and money by replacing arduous, repetitive paper or email processes and is simple to set up and use.

Equisys was founded in 1987 and has offices in London (United Kingdom) and Atlanta, Georgia (USA).

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