

# Dynamic QR Batch Issuance User Guide

## Template Specifications

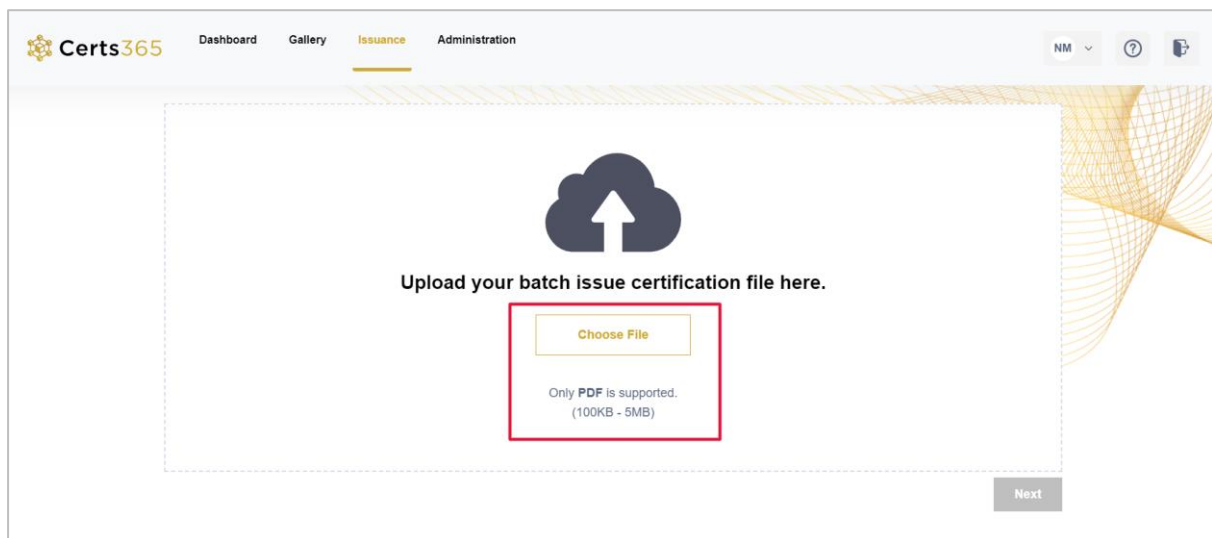
### QR Code Configuration:

- The certificate template does not include a QR code by default, maintaining a clean design.

### PDF File Requirements:

- File Size: Must range between 100KB and 5MB.
- Dimensions:
  - **Width:** Must exceed 74mm.
  - **Height:** Must exceed 105mm.

These specifications ensure optimal rendering across various devices and platforms.



## QR Code Configuration Protocol

### Positioning

- Users can specify the QR code's position by placing a designated red box on the template. The system should allow for dynamic adjustments to ensure placement accuracy.

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|              |            |        |         |
|--------------|------------|--------|---------|
| Basic        | Up to 300  | \$4.00 | \$1,200 |
| Intermediate | Up to 1000 | \$3.50 | \$3,750 |
| Advance      | Up to 2000 | \$2.75 | \$7,000 |
| Contact Us   | > 2000     | Custom | Custom  |

Contact Us

+1-800-123-4567

info@certs365.aicerts.io

123 AI Street, Innovation City

certs365.aicerts.io

Lock QR Code Location

- Upon satisfactory placement, the QR code position must be locked to prevent unintentional modifications.

|              |            |        |         |
|--------------|------------|--------|---------|
| Basic        | Up to 300  | \$4.00 | \$1,200 |
| Intermediate | Up to 1000 | \$3.50 | \$3,750 |
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Lock QR Code Location

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## Submission Process

- Initiate the process by clicking "**Submit**" and wait for the loading indicator to complete. The loading phase must be adequately optimized to provide real-time feedback on submission status.

|              |            |        |         |
|--------------|------------|--------|---------|
| Basic        | Up to 300  | \$4.00 | \$1,200 |
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Unlock QR Code Location

Submit

## Excel File Configuration

### Sample File Acquisition

Download the sample ZIP file post QR code position locking. This file serves as a foundational template for data entry.

Please refer to our Sample file for upload.

Batch Issuance with Dynamic QR Positioning

Upload your certification zip file here.

Choose File

Only zip is supported.  
(Upto 100MB)

Download Sample

Steps to Follow:

**Step 1:** Download the Sample Zip File

**Step 2:** Open the zip file and either edit the existing Excel and PDF files or create a new zip file with separate Excel and PDF files.

**Step 3:** Ensure Correct PDF Naming. The Excel file must list the correct names of the PDF files in the reference column and contain accurate credential details for each PDF.

**Step 4:** Use the Correct Date Format Any dates in the Excel file must be in the format MM/DD/YYYY.

**Step 5:** Check PDF Dimensions. All PDF files in the zip should have the same dimensions as specified.





**Step 6:** Follow the Batch Limit. You can include up to 250 PDF files in the zip along with the Excel file detailing each PDFs credentials.

**Note:** This process may take some time. Please do not refresh or press the back button until it completes.

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## File Structure and Validation

- Extract the contents of the ZIP file and access the Excel file. The file must adhere to a standardized format to ensure seamless integration.
- **Modify the Excel and PDF files as necessary:**
  - Ensure that each PDF file name corresponds precisely to the **{DocumentName}** column in the Excel file to facilitate accurate processing.

| Name   | Type                       | Compressed size | Password p... | Size   | Ratio | Date modified    |
|--|----------------------------|-----------------|---------------|--------|-------|------------------|
|  details    | Microsoft Excel Worksheet  | 10 KB           | No            | 12 KB  | 25%   | 16-09-2024 21:39 |
|  document_1 | Microsoft Edge PDF Docu... | 324 KB          | No            | 330 KB | 2%    | 03-06-2024 20:53 |
|  document_2 | Microsoft Edge PDF Docu... | 324 KB          | No            | 330 KB | 2%    | 03-06-2024 20:53 |
|  document_3 | Microsoft Edge PDF Docu... | 324 KB          | No            | 330 KB | 2%    | 03-06-2024 20:53 |

- **Validate that all PDFs conform to specified dimensions and follow the reference template for QR code integration.**

## Mandatory Data Fields

Populate the following mandatory fields within the Excel file:

- **documentName:** Exact filename of the PDF document.
- **documentID:** Unique identifier for the certification, formatted as a numeric or alphanumeric string.
- **name:** Complete name of the student, formatted as "First Last" without special characters.

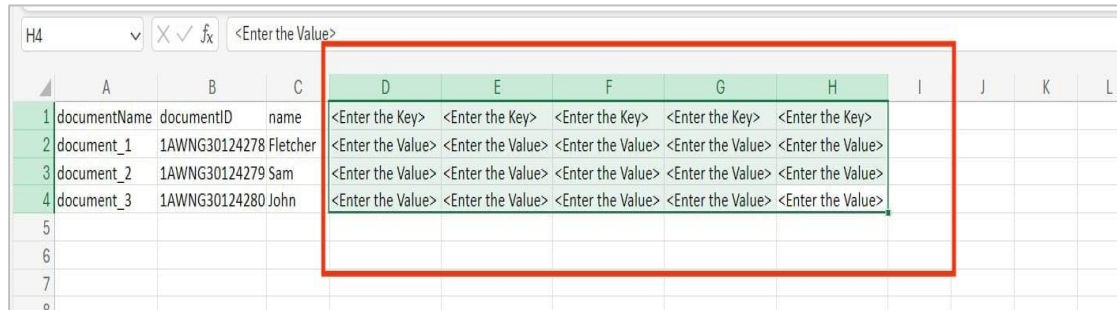
|   | A            | B             | C        | D                 | E                 | F                 | G                 | H                 |
|---|--------------|---------------|----------|-------------------|-------------------|-------------------|-------------------|-------------------|
| 1 | documentName | documentID    | name     | <Enter the Key>   | <Enter the Key>   | <Enter the Key>   | <Enter the Key>   | <Enter the Key>   |
| 2 | document_1   | 1AWNG30124278 | Fletcher | <Enter the Value> | <Enter the Value> | <Enter the Value> | <Enter the Value> | <Enter the Value> |
| 3 | document_2   | 1AWNG30124279 | Sam      | <Enter the Value> | <Enter the Value> | <Enter the Value> | <Enter the Value> | <Enter the Value> |
| 4 | document_3   | 1AWNG30124280 | John     | <Enter the Value> | <Enter the Value> | <Enter the Value> | <Enter the Value> | <Enter the Value> |
| 5 |              |               |          |                   |                   |                   |                   |                   |
| 6 |              |               |          |                   |                   |                   |                   |                   |

## Optional Data Fields

- Users may include up to **5 optional columns** to provide supplementary information for specific records:

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1. Designate a column name (e.g., DateOfIssue, CourseName) that follows a consistent naming convention.
2. Input values for designated rows within that column.
3. Date values may utilize any standard date format (e.g., YYYY-MM-DD, MM/DD/YYYY).



|   | A            | B             | C        | D                 | E                 | F                 | G                 | H                 | I | J | K | L |
|---|--------------|---------------|----------|-------------------|-------------------|-------------------|-------------------|-------------------|---|---|---|---|
| 1 | documentName | documentID    | name     | <Enter the Key>   | <Enter the Key>   | <Enter the Key>   | <Enter the Key>   | <Enter the Key>   |   |   |   |   |
| 2 | document_1   | 1AWNG30124278 | Fletcher | <Enter the Value> | <Enter the Value> | <Enter the Value> | <Enter the Value> | <Enter the Value> |   |   |   |   |
| 3 | document_2   | 1AWNG30124279 | Sam      | <Enter the Value> | <Enter the Value> | <Enter the Value> | <Enter the Value> | <Enter the Value> |   |   |   |   |
| 4 | document_3   | 1AWNG30124280 | John     | <Enter the Value> | <Enter the Value> | <Enter the Value> | <Enter the Value> | <Enter the Value> |   |   |   |   |
| 5 |              |               |          |                   |                   |                   |                   |                   |   |   |   |   |
| 6 |              |               |          |                   |                   |                   |                   |                   |   |   |   |   |
| 7 |              |               |          |                   |                   |                   |                   |                   |   |   |   |   |
| 8 |              |               |          |                   |                   |                   |                   |                   |   |   |   |   |

### Example Cases for Excel Configuration

- **Fully Populated Optional Columns:**

All 5 additional columns are populated for each record. Each certification will integrate the optional fields, facilitating data richness.



|   | A            | B             | C        | D       | E   | F          | G      | H        | I |
|---|--------------|---------------|----------|---------|-----|------------|--------|----------|---|
| 1 | documentName | documentID    | name     | Country | Age | date       | Course | Phone    |   |
| 2 | document_1   | 1AWNG30111111 | Fletcher | USA     | 32  | 12-31-2001 | python | 93290284 |   |
| 3 | document_2   | 1AWNG30111112 | Sam      | IND     | 33  | 12-31-2002 | dsa    | 93290284 |   |
| 4 | document_3   | 1AWNG30111113 | John     | UAE     | 34  | 12-31-2003 | java   | 93290284 |   |
| 5 |              |               |          |         |     |            |        |          |   |
| 6 |              |               |          |         |     |            |        |          |   |

- **Partially Populated Optional Columns:**

5 additional columns are created, but only select rows contain values. Non-populated rows will not display optional fields on the certification, ensuring clarity.



|   | A            | B             | C        | D       | E   | F      | G      | H         | I |
|---|--------------|---------------|----------|---------|-----|--------|--------|-----------|---|
| 1 | documentName | documentID    | name     | Country | Age | date   | Course | Phone     |   |
| 2 | document_1   | 1AWNG30124278 | Fletcher | USA     | 32  | 11-Sep | Python | 913799393 |   |
| 3 | document_2   | 1AWNG30124279 | Sam      |         | 22  |        | Java   | 913799393 |   |
| 4 | document_3   | 1AWNG30124280 | John     | UAE     | 34  | 13-Sep | Dsa    | 913799393 |   |

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- **Unpopulated Columns:**

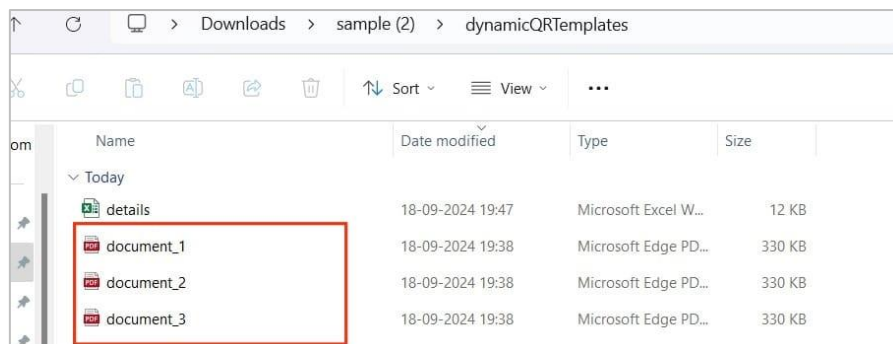
Avoid entering values in optional columns unless the column has been explicitly declared. Failure to declare results in format errors that can disrupt processing.

|   | A              | B             | C        | D   | E  | F      | G      | H         | I |
|---|----------------|---------------|----------|-----|----|--------|--------|-----------|---|
| 1 | documentName   | documentID    | name     |     |    |        |        |           |   |
| 2 | document_1     | 1AWNG30124278 | Fletcher | USA | 32 | 11-Sep | Python | 913799393 |   |
| 3 | document_2     | 1AWNG30124279 | Sam      |     | 22 |        | Java   | 913799393 |   |
| 4 | document_3     | 1AWNG30124280 | John     | UAE | 34 | 13-Sep | Dsa    | 913799393 |   |
| 5 | ✗Wrong Format✗ |               |          |     |    |        |        |           |   |

## Content Packaging Protocol

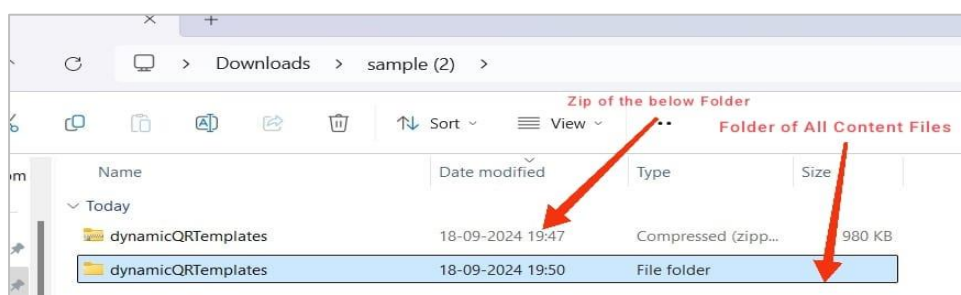
### Validation of Content Folder

- Confirm that the content folder contains the requisite number of PDFs, correctly named in accordance with the **{documentName}** column from the Excel file. Use automated scripts to verify file integrity and naming conventions.



### ZIP File Creation

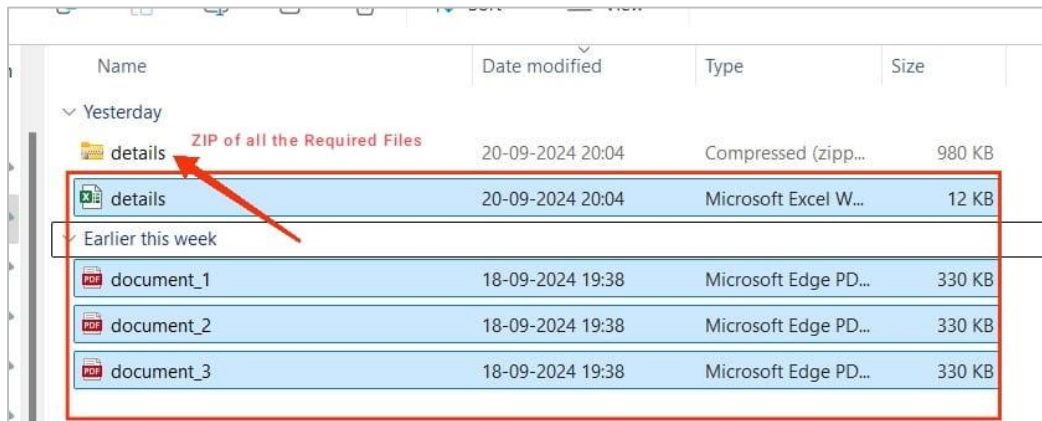
- Generate a ZIP file of the content folder. The compression method must maintain file integrity.





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- Alternatively, compile a ZIP file containing all relevant files, ensuring that all files are correctly categorized.

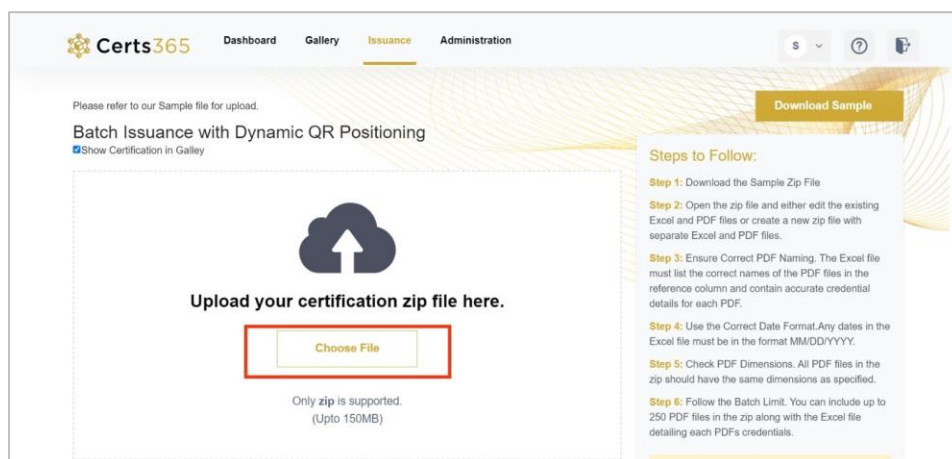


| Name                | Date modified    | Type                 | Size   |
|---------------------|------------------|----------------------|--------|
| ▼ Yesterday         |                  |                      |        |
| details             | 20-09-2024 20:04 | Compressed (zipp...  | 980 KB |
| details             | 20-09-2024 20:04 | Microsoft Excel W... | 12 KB  |
| ▼ Earlier this week |                  |                      |        |
| document_1          | 18-09-2024 19:38 | Microsoft Edge PD... | 330 KB |
| document_2          | 18-09-2024 19:38 | Microsoft Edge PD... | 330 KB |
| document_3          | 18-09-2024 19:38 | Microsoft Edge PD... | 330 KB |

## Validation and Issuance Process

### ZIP File Upload

- Upon ZIP file creation, ensure that the file size does not exceed **150MB** before uploading. Implement validation checks to enforce this limit.



**Certs365** Dashboard Gallery **Issuance** Administration

Please refer to our Sample file for upload.

**Batch Issuance with Dynamic QR Positioning**

[Show Certification in Gallery](#)

**Upload your certification zip file here.**

**Choose File**

Only zip is supported.  
(Upto 150MB)

**Download Sample**

**Steps to Follow:**

- Step 1:** Download the Sample Zip File
- Step 2:** Open the zip file and either edit the existing Excel and PDF files or create a new zip file with separate Excel and PDF files.
- Step 3:** Ensure Correct PDF Naming. The Excel file must list the correct names of the PDF files in the reference column and contain accurate credential details for each PDF.
- Step 4:** Use the Correct Date Format. Any dates in the Excel file must be in the format MM/DD/YYYY.
- Step 5:** Check PDF Dimensions. All PDF files in the zip should have the same dimensions as specified.
- Step 6:** Follow the Batch Limit. You can include up to 250 PDF files in the zip along with the Excel file detailing each PDFs credentials.

### Gallery Generation Option

- Select the option for generating a gallery of produced documents, enabling users to review generated certificates.

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Please refer to our Sample file for upload.

**Batch Issuance with Dynamic QR Positioning**

☐ Show Certification in Gallery

Option For a Gallery of Docs

Upload your certification zip file here.

Choose File

details.zip

Validate and Issue

Download Sample

**Steps to Follow:**

- Step 1:** Download the Sample Zip File
- Step 2:** Open the zip file and either edit the existing Excel and PDF files or create a new zip file with separate Excel and PDF files.
- Step 3:** Ensure Correct PDF Naming. The Excel file must list the correct names of the PDF files in the reference column and contain accurate credential details for each PDF.
- Step 4:** Use the Correct Date Format. Any dates in the Excel file must be in the format MM/DD/YYYY.
- Step 5:** Check PDF Dimensions. All PDF files in the zip should have the same dimensions as specified.
- Step 6:** Follow the Batch Limit. You can include up to 250 PDF files in the zip along with the Excel file detailing each PDFs credentials.

## Validation Execution

- Click "Validate and Issue" and monitor the progress until completion. A confirmation message stating "Certificates Successfully Generated" will be displayed, ensuring clear communication with the user.

## Gallery Option Outcome

- If the gallery option is enabled, a "Show Certification" button will be available for user access, enhancing usability.

Please refer to our Sample file for upload.

**Batch Issuance with Dynamic QR Positioning**

☒ Show Certification in Gallery

Upload your certification zip file here.

Choose File

Only zip is supported.  
(Upto 150MB)

Show Certification

Download Sample

**Steps to Follow:**

- Step 1:** Download the Sample Zip File
- Step 2:** Open the zip file and either edit the existing Excel and PDF files or create a new zip file with separate Excel and PDF files.
- Step 3:** Ensure Correct PDF Naming. The Excel file must list the correct names of the PDF files in the reference column and contain accurate credential details for each PDF.
- Step 4:** Use the Correct Date Format. Any dates in the Excel file must be in the format MM/DD/YYYY.
- Step 5:** Check PDF Dimensions. All PDF files in the zip should have the same dimensions as specified.
- Step 6:** Follow the Batch Limit. You can include up to 250 PDF files in the zip along with the Excel file detailing each PDFs credentials.

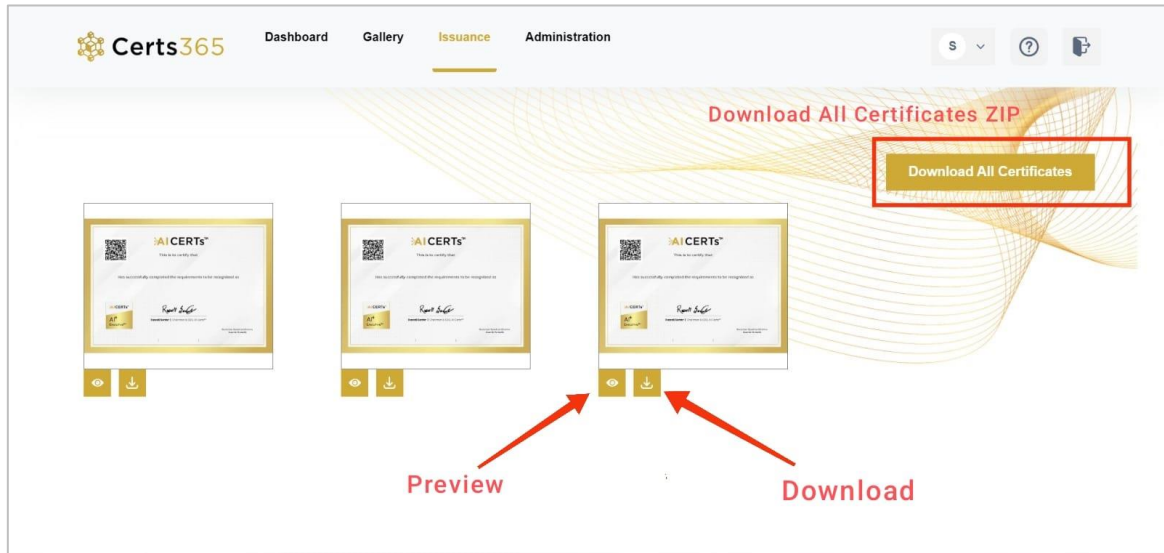
**Note:** This process may take some time. Please do not refresh or press the back button until it completes.



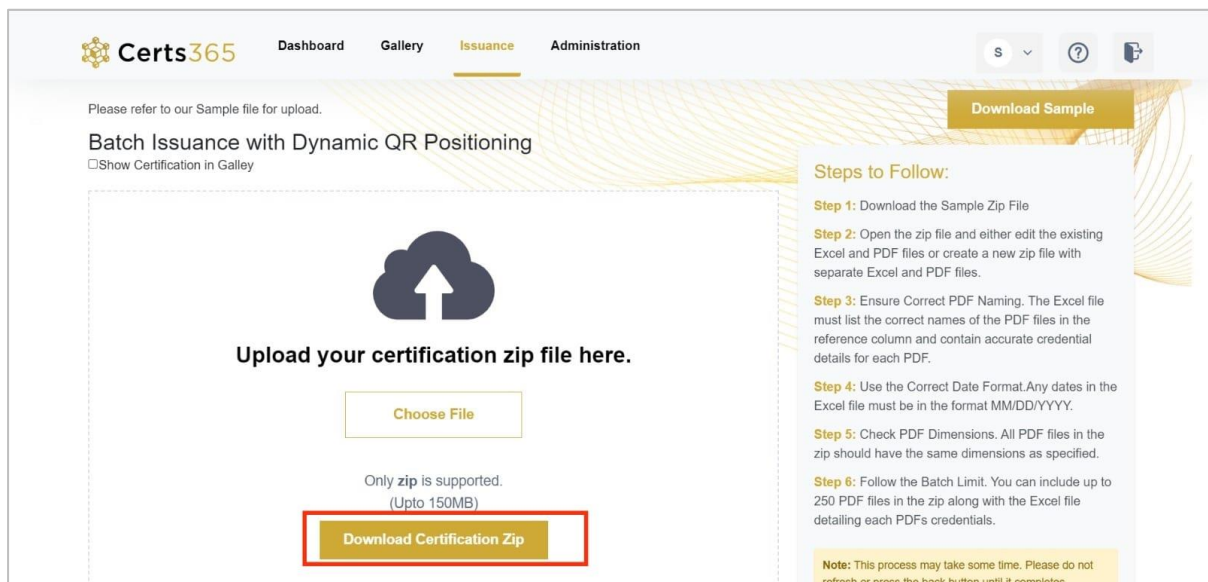
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## Certificate Access and Download Options

- Users may preview or download individual certificates. To retrieve all certificates collectively, select "Download All Certificates" to obtain a ZIP file.



- If the gallery option is not activated, the user will only have the option to download a ZIP of the generated documents, maintaining streamlined access.



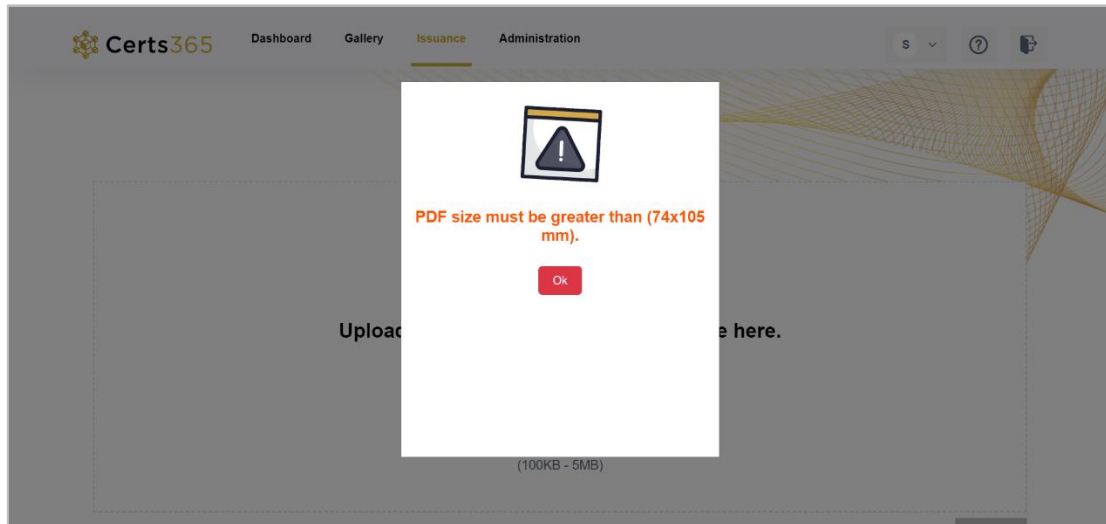
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## Error Handling and Warnings

The system may generate the following warnings during operation:

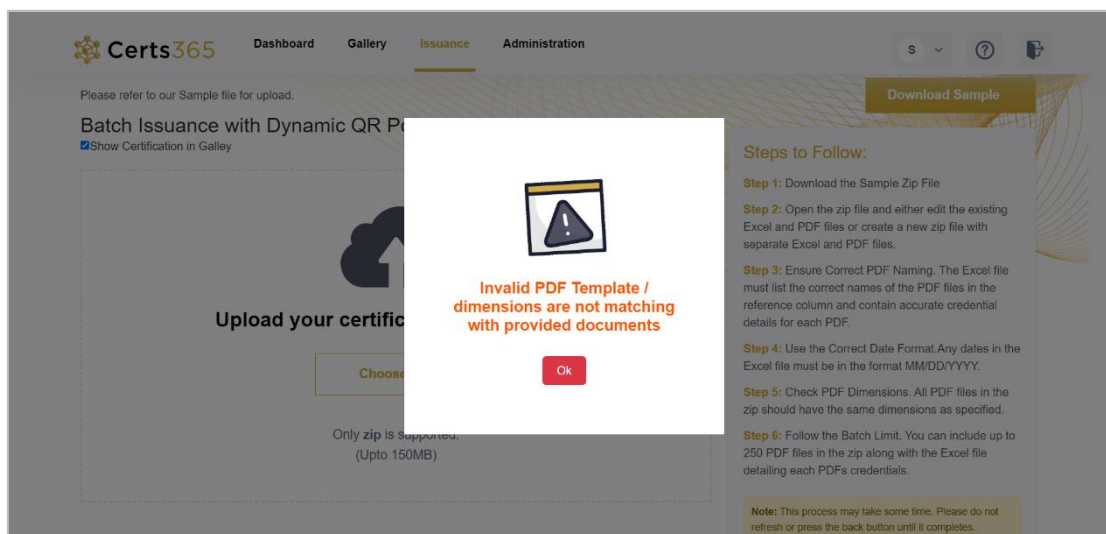
### Invalid Dimensions

- Warning for uploading invalid dimensions in reference template PDFs, prompting users to verify their templates.



### Dimension Mismatch

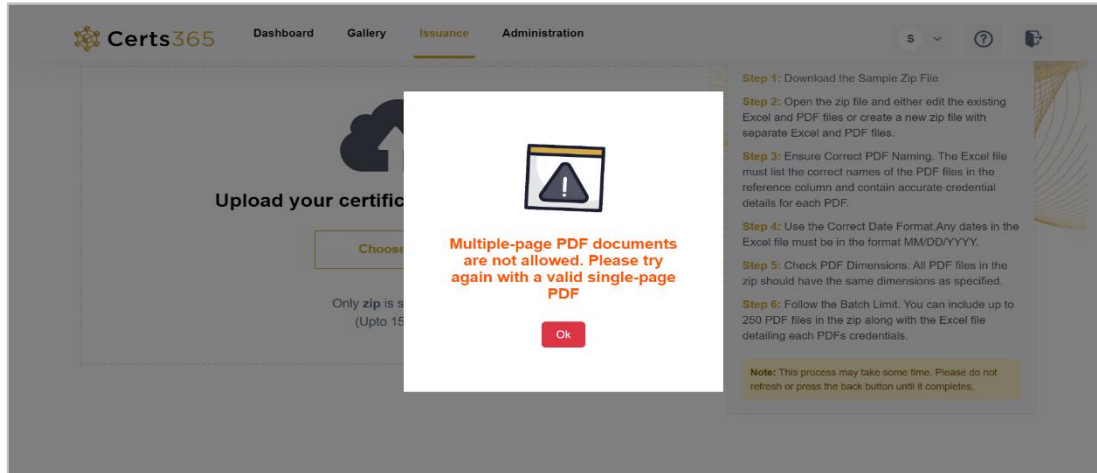
- Warning for the presence of invalid dimensions in template PDFs within the ZIP file, necessitating revalidation of files.



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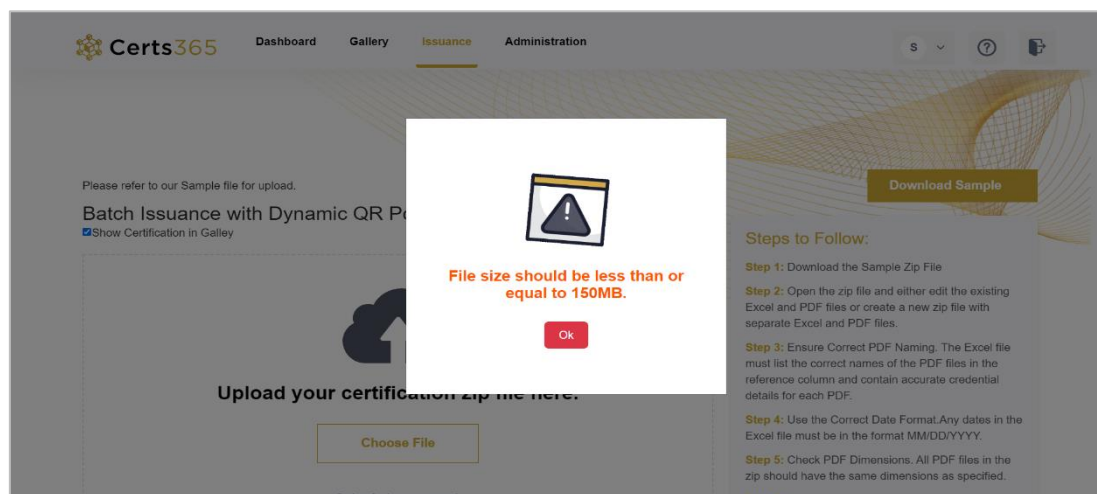
## Multi-page PDFs

- Warning for uploading multi-page template PDFs, which may not be compatible with the single-page certificate design.



## Size Limit Exceeded

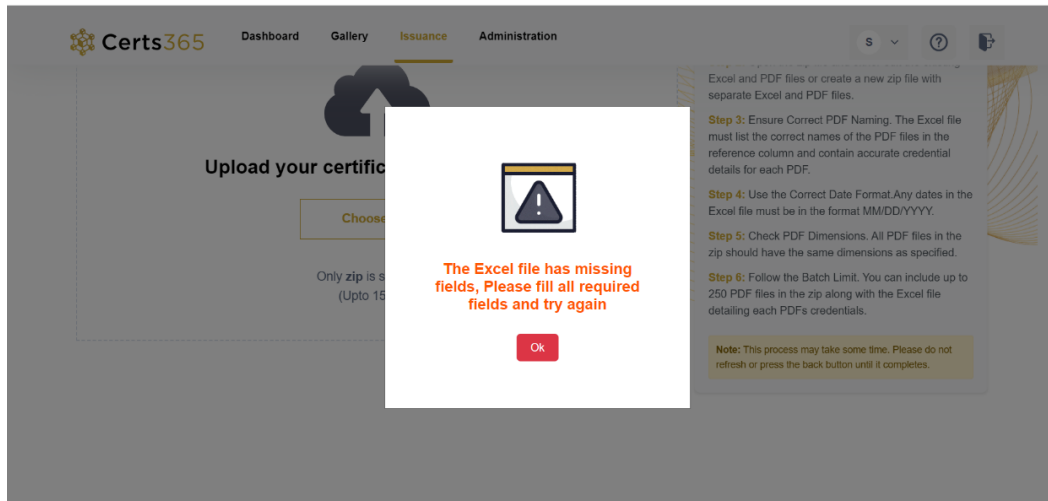
- Warning for exceeding a ZIP file size of 150MB, enforcing strict size management protocols.



## Mandatory Field Checks

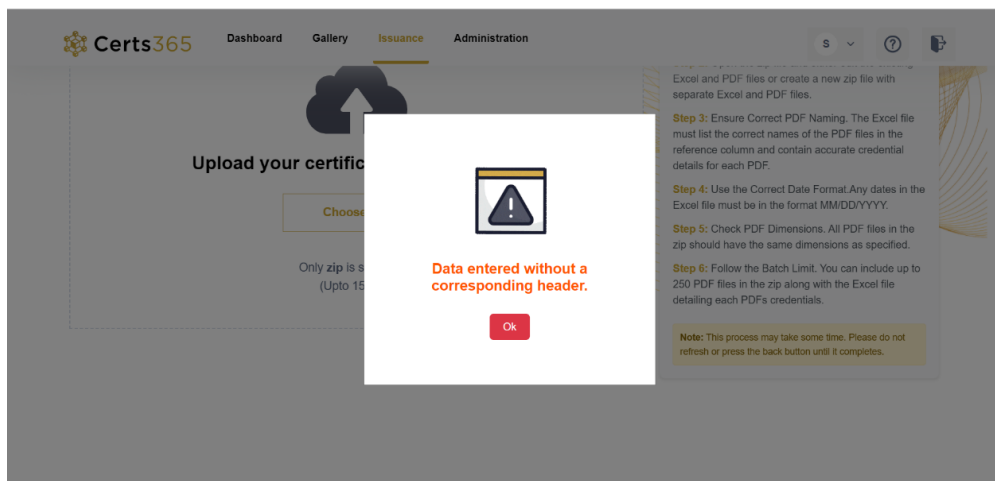
- Warning for unfilled mandatory columns in the data file, prompting immediate correction before processing.

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## Column Name Definitions

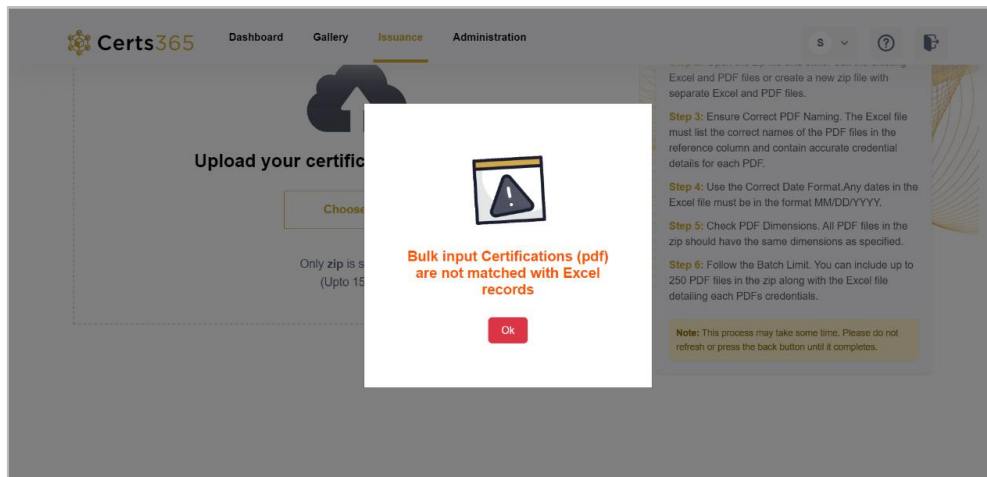
- Warning for Excel file rows lacking defined column names, which can cause processing errors.



## Name Mismatches

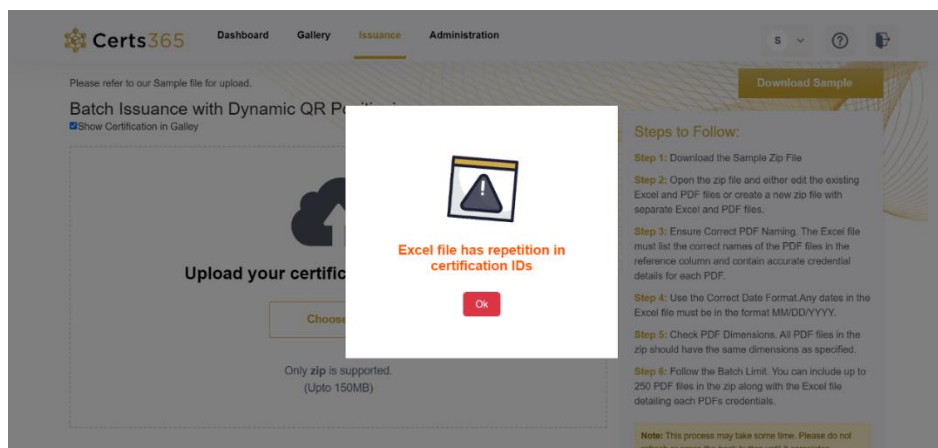
- Warning for discrepancies between documentName entries and template PDF file names, requiring alignment for successful generation.

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## Duplicated IDs

- Warning for duplicated documentID entries in the Excel file, which may cause data integrity issues.



## Invalid Name Format

- Warning for names containing special characters in the Excel file.

