

Overview

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Usage scenario for emailing documents to customers

In this scenario, a print shop wants to show customers who are receiving print statements that they can receive their statements as PDF files. The print shop changes the PDF workflow that prints customer statements so that, in addition to printing the statements, it sends all of them as PDF files to an email service provider. The service provider emails the statements to the customers.

The print shop uses RICOH ProcessDirector Plug-in for Adobe Acrobat to identify the statements as individual documents in the production PDF file for each job. The data in each statement includes the customer name and email address.

To change the workflow so that it both prints and emails statements, an administrator at the print shop configures RICOH ProcessDirector to support the new process.

The administrator:

- Configures RICOH ProcessDirector to send documents to an external SMTP server at the email service provider. The configuration involves setting values for the **Alternate SMTP server** properties.
- Defines a custom document property, **Doc.Custom.CustomerName**, in the `docCustomDefinitions.xml` file, runs the **docCustom** utility, and upgrades the Custom Document Properties feature.
- Loads the updated RICOH ProcessDirector document properties to RICOH ProcessDirector Plug-in for Adobe Acrobat.
- Uses the **Define Document Property** function in the plug-in to specify the data that two document properties extract from each document in the PDF file for the job:
 - **Doc.EmailAddress** extracts the email address of the customer.
 - **Doc.Custom.CustomerName** extracts the customer name.
- Saves the two document property definitions in the control file that identifies the statements as individual documents.
- Adds the **EmailDocuments** step to the workflow and sets values for the step properties:
 - The value of **Recipient address** is `${Doc.EmailAddress}`.
 - The value of **Subject line** is `Statement for ${Doc.Custom.CustomerName}`.
 - The value of **Message** is `Save trees by receiving your statements electronically!`
 - The value of **Attach document** is **Yes**.
 - The value of **Name of attachment** is `${Doc.Custom.CustomerName}.pdf`.

When the administrator enables the workflow and submits a job to it, RICOH ProcessDirector:

- Sends the email service provider a PDF file for each customer statement in the job.
- Prints a statement for each customer.

The service provider emails each customer their statement. A customer named Anita Doe receives this email:

To: Anita.Doe@mymail.com
Subject: Statement for Anita Doe
Attachment: Anita Doe.pdf

Save trees by receiving your statements electronically!

After receiving a print statement by mail and a PDF statement by email, each customer can decide whether to receive future statements by mail or email.

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