Overview

Preference Management

The Preference Management feature lets you update document property values with values from an external preferences file. These values can be used to change the content of selected documents or to change the processing of those documents.

For example, you can create a preferences file that identifies customers who have chosen eco-friendly options. After you identify the customers, you change their Output type to email so that they can receive their statements via email instead of by postal mail.

The **ApplyPreferences** step uses a document property mapping object to map the values from the preferences file to RICOH ProcessDirector document properties. The document property mapping object specifies document properties that identify documents to be updated. The values of those document properties must match values in the preferences file. Then, the object specifies which document properties are updated with values from the preferences file.

This no-charge feature is provided with the base product.

Prerequisites

To use the Preference Management feature, first install a feature that supports document processing:

- For PDF files, install the PDF Document Support feature.
- For AFP files, install the AFP Support feature.

Step template

Preference Management provides the **ApplyPreferences** step template. A step based on this step template lets you specify a preferences file used to update one or more job or document property values.

Object

Preference Management provides the **Document Property Mapping** object. This object lets you map information from the preferences file to document properties in RICOH ProcessDirector, which are then used by steps to generate output files.

In this section:

[Using information about documents](#)

All document processing features collect and track information about individual documents in a job. RICOH ProcessDirector extracts the information (such as customer names and addresses) from data in the documents themselves. The Preference Management feature lets you use other information (such as favorite movies or document delivery preferences) about the individual or account associated with each document. The documents themselves do not contain that information.

[Usage scenario for applying document markup based on a preferences file](#)

In this scenario, a company changes their PDF print process to add a marketing offer to customer statements in a composed PDF file before printing the statements. One of two different marketing offers can be added. The choice for each statement is based on the award level that a customer has attained. Because the award level is not part of the data on the statement, the company exports award levels from their customer database into a text file that contains headers. That text file is used as a preferences file. The values in the file determine the offer applied to each statement.

[Usage scenario for distributing statements based on a preferences file](#)

In this scenario, a company changes their PDF print process to distribute statements to customers through multiple channels. Customers choose whether their statements are printed, emailed, or displayed in their customer account on the company website. Because this information is not part of the data on the statement, the company exports the information from their customer database into a text file that contains headers. That text file is used as a preferences file. The values in the file determine how each statement is distributed to the customer.

Parent topic: [Document processing features](#)