Bottomline Technologies

User Guide

PT-X Connect

PT-X Connect User Guide

Published in the United States of America

Bottomline Technologies

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Preface

Contacting Bottomline Technologies

This section provides contact information for Technical Services, Training, and Documentation.

Technical Services

If you have questions about a Bottomline product and are unable to find the answers in the product documentation, contact Technical Services (www.bottomline.com/customer_support/index.html).

USA (Portsmouth, NH)

- Web: portal.bottomline.com
- Telephone: +1 800 839 9029

Customer Technical Assistance Center (CTAC) is available Monday through Friday from 0830 to 2030 Eastern Time.

Europe (United Kingdom)

- E-mail: emea-support@bottomline.com
- Telephone: 0870 081 8250 (+ 44 118 925 8250 if calling from outside the UK)
- Fax: 0870 081 8280 (+ 44 118 925 8280 if calling from outside the UK)

Technical Services is available from 0830 to 1730 Monday through Thursday and from 0830 to 1700 on Fridays.

Asia Pacific (Australia)

- E-mail: ap_support@bottomline.com.au
- Telephone: 1 300 655 515 (+61 3 8823 6798 if calling from outside Australia)

Technical Services is available Monday through Friday from 0830 to 1700 Australia Eastern Standard Time.

Training

Bottomline Technologies offers training courses in many products. For information, contact your account representative.

Documentation

Bottomline Technologies is always interested in improving the quality of the product documentation. If you find errors or omissions in this documentation, or have suggestions on how to improve it, email your comments to documentation@bottomline.com. You can send comments anonymously or provide contact information so that we can contact you.

Conventions

The following table describes the conventions used in this guide.

This convention	Indicates
bold text	• Names of items in the user interface, such as menus, options, fields, tabs, or buttons. • Names of files to execute as part of a procedure.
italic text	• Items that vary according to the environment or situation. • References to other parts of the product documentation.
`code text`	• File names and paths. • Code examples. • Text of messages displayed on the computer screen. • Text you enter in a form or in a command window.
`italic code text`	• Variable parts of a file name or path. • Information that you enter in a form or in a command window where the actual text depends on particular circumstances.
hyperlink	• Cross references to other parts of this guide. • Links to Web sites or email addresses.

Chapter 1

Welcome

PT-X Connect allows you to securely manage the creation and delivery of invoices, purchase orders, and other transactional documents. It features a real-time user interface, management tools to enable items to be prioritised and intelligence from the data to help improve decisions around transactional business documents and improve process efficiency.

This document contains all the important information you need in order to use the **PT-X Connect** solution.

Chapter 2

Overview

Navigation

To access PT-X Connect, go to http://go.pt-x.com/.

The user interface contains the following tabs:

- **Insights** - is a dashboard showing the Outbox activity, Documents at risk and Time until the document is actioned in color-coded graphs. See *Insights.*
- **Inbox** - contains details of the documents that a user receives from PT-X Connect. See *Inbox.*
- **Outbox** - contains details of the documents that a user sends from PT-X Connect. See *Outbox.*
- **Contacts** - contains contact addresses to be used if source data does not contain email addresses. See *Contacts.*

To access information about users, roles, logos, document profiles, apps, printers and projects. See *Settings.*

Flow

- PT-X Connect user created.
- Project uploaded into Connect. See *Projects.*
- Document profile created. See *Document Profiles.*
- Document uploaded to Connect as either a PDF or raw data. See *Uploading Documents.*
- Raw data processed by PT-X Connect to produce outgoing document.
- Document appears on **Outbox**. See *Outbox.*
- Sender actions document depending on status. See *Document Statuses.*
- Email sent to recipient depending on delivery options, see *Delivery.*
- Check documents produced if required. See *Check Documents*.
- Recipient may view the document either from the email received or PT-X Connect registered users can view from the Inbox. See *Inbox.*

Chapter 3

Uploading Documents

Documents can be uploaded to PT-X Connect via:

- PT-X Link using watched folders, virtual printers or email (refer to *PT-X Link Configuration Guide* for more details).
- Using the **Upload documents** option within PT-X Connect Plus, see *Upload Documents.*

Chapter 4

Outbox

This screen contains details of a user's outgoing documents and contains the following details:

- **Upload documents** option - see *Upload Documents.*
- **Summary** - displays document totals and statuses.
- **Batches** tab - displays documents grouped by batch.
- **All** tab - displays documents without grouping them by batch.
- **Done** tab - displays all documents that are marked as **Done**. See *Managing your Outbox.*
- **Pending deletion** tab - displays all documents that have exceeded their retention period. See *Retention Period*.

> **Note**
> Documents that have exceeded their retention period are only viewable by a PT-X Connect user with administrator privileges.

At the bottom left of the Outbox screen, the number of documents being viewed and the total number of documents is displayed.

At the bottom right of the Outbox screen, select the number of documents per page to display from the drop down and then use the arrows to scroll through each page or select the page required from the drop down list.

To upload documents from the Outbox, see *Uploading Documents.*

To view documents from the Outbox, see *Viewing Documents.*

To print documents from the Outbox, see *Printing Documents.*

To download documents from the Outbox, see *Downloading Documents.*

To attach supporting files to documents in the Outbox, see *Attaching Documents.*

Sorting Columns

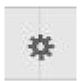
To sort documents on the Outbox:

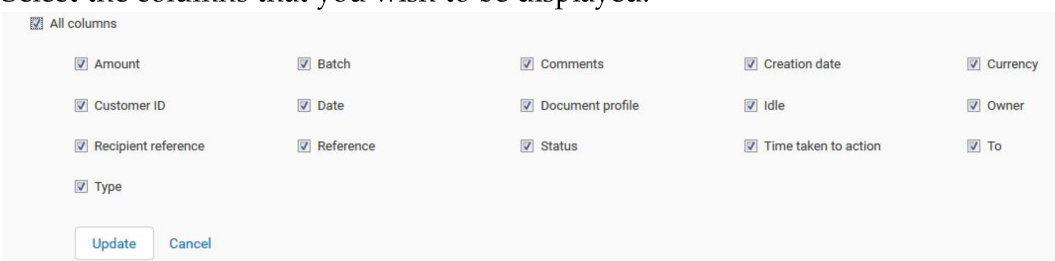
1. Click on the column header.
2. The arrow will indicate whether you have sorted in ascending or descending order.

> **Note**
> On the Batches tab, documents are sorted within each batch. Sortable columns are (**Reference**, **Type**, **Date**, **Amount**, **Recipient Reference**, **Owner**, **Customer ID** and **Batch**) .

Removing or Adding Columns

To add or remove columns on the Outbox:

1. Click on the  icon on the Outbox.
2. Select the columns that you wish to be displayed.

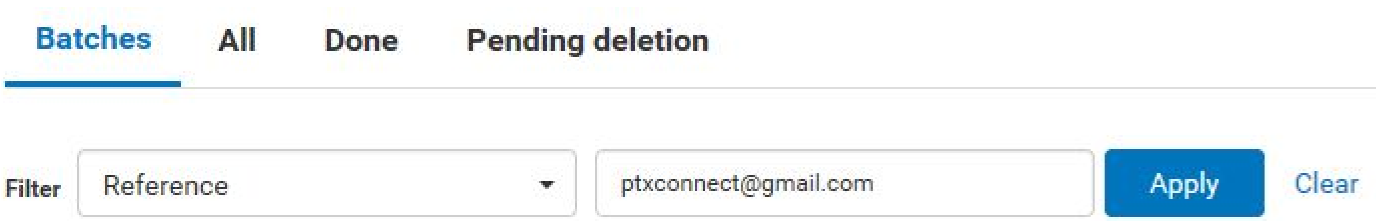


3. Click **Update**.

Searching for Documents

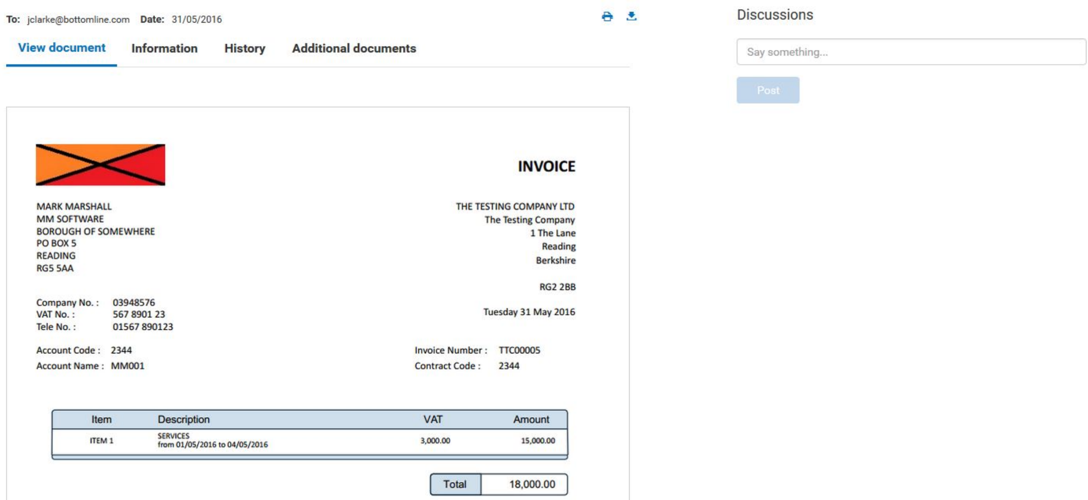
To search for a single document or group of documents:

- On the **Outbox**, choose your filter from the drop down list.
- Enter filter criteria, for example a date range or amount.
- As you apply the filter, the summary at the top of the screen will update to reflect the value and status of the documents you have chosen to filter.



Viewing Documents

To view a document from the Outbox, click on the document reference.



The following information is displayed:

- **View document** - displays the document. See *View Document*.
- **Information** - document information including Reference, Amount, Profile.
- **History** - displays history of the document.
- **Additional documents** - used to attach supporting files to a document. See *Attaching Supporting Files.*

View Document

From View document tab you can:

- Post a comment, see *Enabling Document Discussions.*
- Print a document using the print icon .
- Download a document using the download icon .

Upload Documents

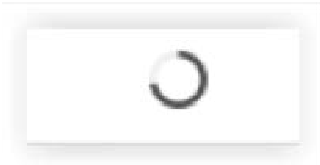
To upload documents into PT-X Connect Plus:

- Go to the **Outbox**.
- Click **Upload documents** at the top left of the screen.
- Select the document profile.
- Browse to a file on your computer or drag the file onto the screen.

- You will now be returned to the Outbox.
- The documents will appear when the process has completed.

Tips

The status bar at the top of the screen spins to indicate the file is being processed. Hover over the wheel to see the current process status. Click on the wheel to keep the process status visible until you refresh the page or navigate away.

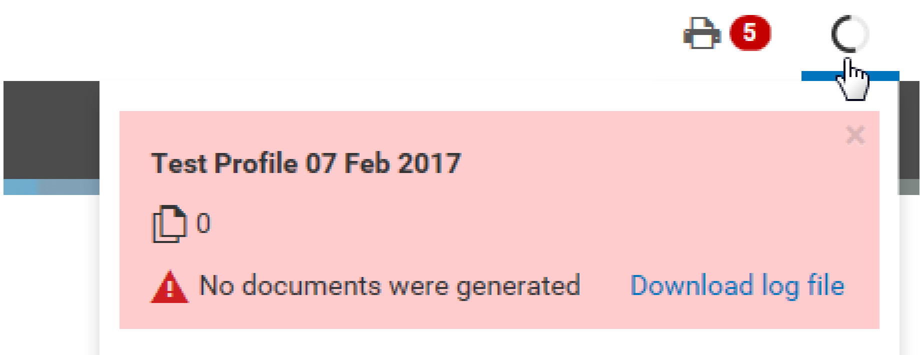


Viewing Logs for a Failed Job

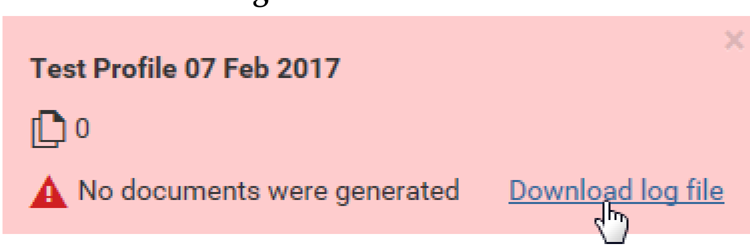
A **Download log file** option is available if a job has failed within PT-X Connect, for example unable to upload a document, no documents were generated.

To view a log file for a failed job:

1. Log in to PT-X as a Connect user.
2. Click the spinning circle at the top right hand corner of the screen.



3. Click **Download log file**.



4. Click **Open** to open the log file, click **Save** to save or **Cancel** to cancel the download request.

Removing a Failed Job

If a job has failed within PT-X Connect then it can be removed from the queue.

To remove a failed job:

1. Log in to PT-X as a Connect user.
2. Click the spinning circle at the top right hand corner of the screen.

3. Click **X** at the top right hand corner.

Sending Documents Manually

There are two ways to send documents from the Outbox:

- Click **Send** in the **Action** column.
- Select individual or multiple documents in the Outbox and click **Send documents** at the bottom of the screen.

Tips

- You can select all documents in a batch using the check box next to the batch name. Or select all documents that are visible on the page by selecting the check box in the top left corner of the document grid.
- To correct missing or incorrect emails before sending the document click on the email. A new box will appear to enable you to change the email address or add/remove any additional recipients.

Document Statuses

The status of each document is presented under the column headed **Status**. The summary at the top of the screen also shows the total value and number of documents for each status.

Notes

- Documents with a status of **Viewed**, **Printed** or **Downloaded** all fall under the category **Actioned**.
- Paid status does not appear in the status column but is indicated by an amber/green tick next to the amount. **Not Paid** is implied by no tick at all.

Status	Definition	Recommended Action
Unsent	Document has not been sent.	Check and send documents.
Sending	PT-X Connect is sending the document. If at first unsuccessful, the system will continue to try and deliver the document for up to 3 days.	
Failed	Unsuccessful delivery of the document	Click on the status of each document to view the history and the reason for the failure. Use **Resolve** to change the email address or print and send manually
Warning	Indicates that a warning message has been returned by the recipient's mail server. The document may or may not have been delivered.	Click on the status of each document to view the history of the document which will show you the warning message. Use **Resolve** to change the email address or print and send manually. If the warning message is acceptable, simply mark as delivered to change the status.
Delivered	Indicates a positive response from the recipient's email system confirming delivery of the document.	Any document that has been **delivered** but not actioned could highlight a potential cash flow risk to your organisation – for whatever reason the recipient has ignored to process the invoice or remittance you have sent them.
Viewed	Recipient has viewed the document.	
Printing	Document is printing.	
Printed by Sender	Sender has printed the document.	
Printed by Recipient	Recipient has printed the document.	
Downloaded	Recipient has downloaded the document.	
Not Paid	Recipient has not paid the invoice yet.	Focus your AR team's effort on contacting those customers/suppliers that have not paid the invoice to reduce the risk of being paid late.

Partially Paid	Recipient has paid a proportion of the invoice.	Focus your AR team's effort on contacting those customers/suppliers that have partially paid the invoice to reduce the risk of not being fully paid.
Fully Paid	Recipient has paid the invoice in full.	

Printing Documents

To print a document or group of documents:

- Select the document(s) in the Outbox.
- Click **Print**, which appears at the bottom of the screen.

Resolving Failures

If a document is marked with a status of **Failed** or **Warning** you may use the **Resolve** option to take appropriate action:

Refer to *Document Statuses* for more details.

Opening and Closing Document Discussions

Senders and recipients can have document discussions through PT-X Connect.

Select the appropriate document and enter a comment underneath **Discussions** to the right of the document.

- Click **Post**.

A recipient will receive a notification email containing a link to the document so that they can reply in due course.

- When the discussion is complete, click **Close**.

Note

Only senders can close document discussions.

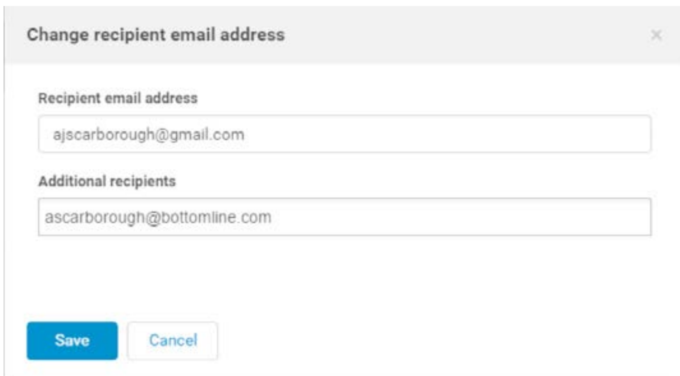
For details on recipients opening document discussions, see *Opening Document Discussions.*

Sending to Additional Recipients

There are two ways you can add additional email addresses to receive documents from PT-X Connect in your data, using **Contacts** (see *Sending to Additional Recipients from Contacts)* , or via the **Outbox**.

To add additional recipients to documents via the Outbox:

- Click on the email address in the **Outbox** to add recipients manually.



- Click **Save.**

Notes

- Additional recipients can view, print and download any document that is sent to them. However, the status of the document shown in the PT-X Connect Outbox will only reflect the primary contact.
- Additional recipients do not see the documents in their Inbox.
- To check whether a copy recipient has successfully received the document, this can be seen in the document history.

Attaching Supporting Files

Senders can attach, view and remove supporting files to a document.

Notes

- A sender is unable to remove files that a recipient has uploaded and vice-versa.
- The following file types are supported: PDF, DOC, DOCX, XLS, XLSX, PNG, JPG, JPEG, BMP, TIFF, TIF.

To attach a supporting file:

1. From the **Outbox**, select the document.
2. Select **Additional documents**.
3. Select **Upload documents**.
4. Drag & drop a file or click **select a file** to upload.

To view a supporting file:

1. From the **Outbox**, select the document.
2. Select **Additional documents**.
3. Click on the supporting file.
4. Choose from the following options:
   - **Open** - to open the file.
   - **Save** - to save the file.
   - **Cancel** - to cancel the view request.

To remove a supporting file:

1. From the **Outbox**, select the document.
2. Select **Additional documents**.
3. Click **Remove** for the supporting file under in the **Remove document** column.

Downloading Documents

To download a document or group of documents:

- Select the document(s) in the Outbox.
- Click **Download**, which appears at the bottom of the screen.

Note

Documents downloaded as a group are downloaded as one single PDF file.

Managing your Outbox

To keep your Outbox tidy you can mark documents as **Done**.

1. Select individual or multiple documents from your Outbox.
2. Click **Mark as Done** at the bottom of the screen.
3. The documents will be moved from the **Batches** view to **Done.**

Chapter 5

Inbox

This contains a PT-X Connect user's incoming documents and contains two tabs:

- **Inbox** - list of documents
- **Done** - list of documents that have been manually marked as Done. See *Managing your Inbox.*

To filter on the documents displayed, use the drop down list of fields in the Filter box.

At the bottom left of the Inbox screen, the number of documents being viewed and the total number of documents is displayed.

At the bottom right of the Inbox screen, select the number of documents per page to display from the drop down and then use the arrows to scroll through each page or select the page required from the drop down list.

To view documents from the Inbox, see *Viewing Documents.*

To print documents from the Inbox, see *Printing Documents.*

To download documents from the Inbox, see *Downloading Documents.*

To attach supporting files to documents in the Inbox, see *Attaching Documents.*

Viewing Documents

To view a document from the Inbox, click on the reference for the document.

The following information is displayed:

- **View document** - displays the document and any discussion posts.
- **Additional documents** - used to attach or view supporting files to a document. See *Attaching Supporting Files.*

Printing Documents

To print a document or group of documents:

- Select the document(s) in the Inbox.
- Click **Print** which appears at the bottom of the screen.

Note

The **Print** option is only available if the user is registered as a sender (is an admin user or is a non-admin user assigned to a role that has the necessary permissions set).

Attaching Supporting Files

Recipients can upload, download and remove supporting files to a document.

Notes

- A sender is unable to remove files that a recipient has uploaded and vice-versa.
- The following file types are supported: PDF, DOC, DOCX, XLS, XLSX, PNG, JPG, JPEG, BMP, TIFF, TIF.

To attach a supporting file:

1. From the **Inbox**, select the document.
2. Select **Additional documents**.
3. Select **Upload documents**.
4. Drag & drop a file or click **select a file** to upload.

To download a supporting file:

1. From the **Inbox**, select the document.
2. Select **Additional documents**.
3. Click on the supporting file and select the appropriate option for the file.

To remove a supporting file:

1. From the **Inbox**, select the document.
2. Select **Additional documents**.
3. Click **Remove** for the supporting file under in the **Remove document** column.

Recipients (including users not registered with PT-X Connect) can also view, print and download supporting files from the email received from PT-X Connect by clicking on **View document now** or the link included in the email, then select **Additional documents**.

Opening Document Discussions

Senders and recipients can have document discussions through PT-X Connect.

Unregistered users must create an account with PT-X Connect to view the **Inbox** or leave comments.

Select the appropriate document and enter a comment underneath **Discussions** to the right of the document.

- Click **Post**.

When a recipient of a document adds a comment, all users on the sender's account that have access to the profile under which the document was created, (either by having administrator privileges or having a role for that profile) will receive a notification email about the comment.

For details on senders opening and closing document discussions, see *Opening and Closing Document Discussions.*

Downloading Documents

To download a document or group of documents:

- Select the document(s) in the Inbox.
- Click **Download**, which appears at the bottom of the screen.

> **Note**
> Documents downloaded as a group are downloaded as one single PDF file.

Managing Your Inbox

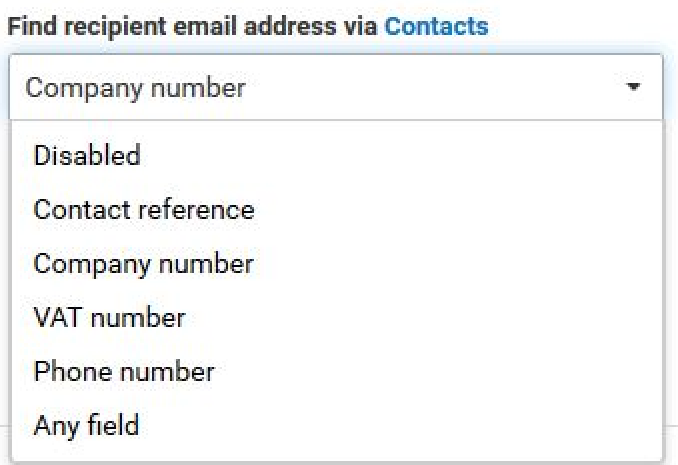
To keep your Inbox tidy you can mark documents as **Done**.

1. Select individual or multiple documents from your Inbox.
2. Click **Mark as Done** at the bottom of the screen.
3. The documents will be moved from the **Inbox** view to **Done.**

Chapter 6

Contacts

PT-X Connect contains an address book which can be used if your source data does not contain email addresses. PT-X Connect can be configured to match data in your source file (for example the company number) to a contact record so that the correct email address is selected for each document.



> **Note**
> The inclusion of an email address in raw data imported into PT-X Connect will override any setting in Contacts.

From Contacts, you can also configure additional information about recipients, such as:

- Always send attachments - using the **Always send attachment** check box.
- Additional recipients, see *Sending to Additional Recipients*.

Sending to Additional Recipients

There are two ways you can add additional email addresses to receive documents from PT-X Connect in your data via the Outbox (see *Sending to Additional Recipients from Outbox*), or using **Contacts**.

To add additional recipients to documents via Contacts:

1. Go to **Contacts.**
2. Select a contact.
3. Add additional recipients email addresses in the **Additional recipients** box.

4. Click **Update**.

Notes

- Additional recipients can view, print and download any document that is sent to them. However, the status of the document shown in the PT-X Connect Outbox will only reflect the primary contact.
- To check whether a copy recipient has successfully received the document, this can be seen in the document history .

Chapter 7

Settings

To access the settings, click on the cog icon at the top right hand corner .

The following information is displayed:

- Users - see *Users.*
- Roles - see *Roles.*
- Logos - *Logos.*
- Document Profiles - see *Document Profiles.*
- Apps - see *Apps.*
- Printers - see *Printers.*
- Projects - see *Projects.*

Users

To create a PT-X Connect user:

1. Create a PT-X user, see *User Administration*.
2. Allow access to the PT-X Documents module, see *Module Administration*.

Migrated Users

Users created prior to PT-X Connect 5.1 may need to ensure that their details are correct.

To update user details:

1. Click **Update user profile** from the user icon at the top right hand corner of the screen.
2. The User details screen is displayed.
3. Click **Edit user details** and your user details are displayed.
4. Fill in the details, ensuring that the mandatory fields (**First name**, **Last name** and **Job title**) are present.
5. Click **Save changes**.

User Administration

1. Log in to PT-X as a Connect user with administrator privileges.
2. From the settings options at the top right hand corner, select **Users**.
3. Click **New user**. The Create user screen is displayed.
4. Fill in the details, ensure that the mandatory fields (**First name**, **Last name**, **Job title** and **Email**) are present.
5. Select **Administrator** if the user will have user administrator privileges.

> **Note**
> User administrator privileges are independent of the administrator privileges for the Documents module within PT-X, see *Module Administration*.

6. Click **Create user**.

Module Administration

> **Note**
> At least one role must be created before allowing access to PT-X Connect for non-admin users.

To allow access to PT-X Connect:

1. Log in to PT-X as a Connect user with administrator privileges.
2. From the settings options at the top right hand corner, select **Users**.
3. Select the user. The User details screen is displayed.
4. Under **Modules**, allow access to the **Documents** module.
5. Select **Documents administrator** if the user will need administrator privileges for the module.
6. For a non-admin user, select the required role for the module.
7. Click **Save changes**.

Administrator Privileges

Users with administrator privileges can carry out the following functions:

- Add and delete users.
- Assign administrator privileges to users.
- Edit user details.
- Create, assign and delete user roles.
- Upload logos.
- Create and edit document profiles.

- Upload and delete project files.
- Create and edit Apps.
- Pause/resume/cancel/redirect print jobs.

Tips

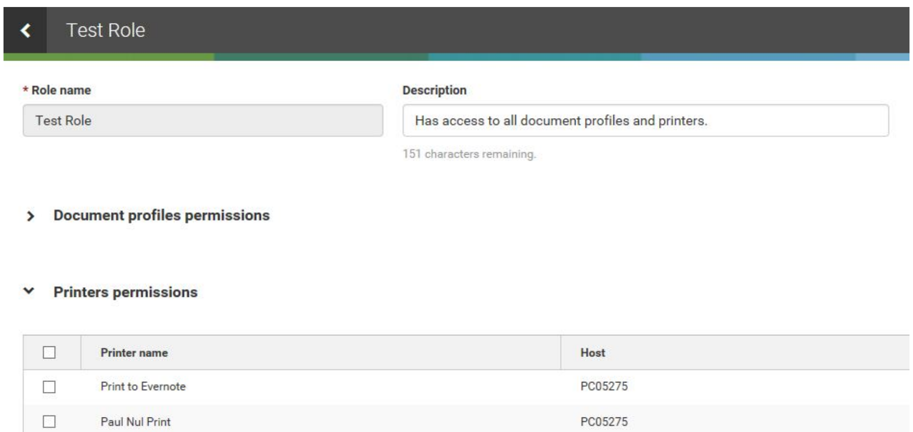
- Users cannot remove administrator privileges from either themselves, or the last user to have these privileges as an account can never be left without an administrator.

Roles

A role in PT-X Connect defines what document profiles and printers each user has access to. Any user who does not have admin privileges must be assigned a role. Administrators can create and assign user roles.

To create and assign user roles:

1. Log in to PT-X as a Connect user with administrator privileges.
2. From the settings options at the top right hand corner, select **Roles**.
3. Select **New role**.
4. Create a role name and description.
5. Under **Document profiles permissions**, select the profiles that the user has access to.
6. Under **Printer permissions**, select the printers that the user has access to.
7. Click **Create** to create the role.



Tips

- You can restrict a user's access to their relevant documents through these roles.
- The restrictions you apply will mean that the Outbox Summary, Insights dashboard and emailed Watch reports are only relevant to the document profiles assigned to the user role.

Logos

From the settings options at the top right hand corner, select **Logos** in order to upload the logos that you want to use on your documents and in the body of your emails.

You can upload as many logos as you require. Your logos will be available to select when you create or edit your document profiles.

Valid file formats for logos are PNG, GIF and JPG, with a maximum size of 100KB.

Apps

Apps contains details of the applications that PT-X Connect are integrated with.

To create a new app:

1. From the settings options at the top right hand corner, select **Apps**.
2. Click **New app** at the top left of the screen.
3. Enter a name for your app. In the **Type** field, select one of the following:
   - **PT-X Link** - for integration with for PT-X Link.
   - **OAuth2 integration** - for integration with a third party, such as Transform Foundation Server.
4. Click **Create** at the bottom of the screen.

For PT-X Link apps:

1. Download the PT-X Link Installer by clicking the download button.
2. Run the installer on the machine that will be used to import documents to PT-X.
3. Bottomline's Professional Service team will assist with the configuration of an existing document output solution to integrate with the PT-X Link App and upload documents to PT-X.

Document Profiles

Document profiles within PT-X Connect are used for uploading documents to PT-X Connect.

A document profile contains:

- Details about the source file that get sent to PT-X Connect.
- Styling and branding information for the documents that get sent by PT-X Connect.

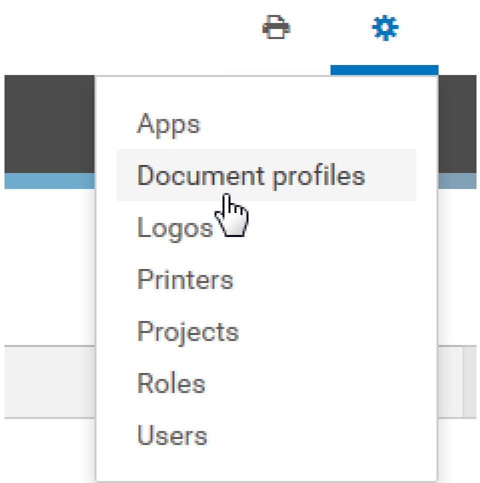
Projects are used by Document profiles when specifying the import type. For information about Projects, see *Projects.*

- To view document profiles, see *Viewing Document Profiles.*
- To create a document profiles, see *Create a Document Profile.*
- To update document profile, see *Update a Document Profile.*
- To delete a document profile, see *Delete a Document Profile.*

Viewing Document profiles

To view the Document profiles within PT-X Connect:

1. Log in to PT-X Connect as a user with administrator privileges.
2. From the settings options at the top right hand corner, select **Document profiles**.



3. The Document profiles screen will be displayed and contains the following fields:
   - **Name** - name of document profile.
   - **Description** - description of document profile.

Create a Document Profile

To add a new document profile to PT-X Connect:

1. Log in to PT-X as a Connect user with administrator privileges.
2. From the settings options at the top right hand corner, select **Document profiles**.
3. From **Document profiles**, select **New profile**.
4. Fill in the details for the *Setup*, *Delivery*, *Check documents* and *Presentation* tabs, see below.
5. Click **Create**.

Notes

- The **Presentation** tab will only be displayed if a Transform classic file format is selected in the **Setup** tab that requires a layout.
- The **Check documents** tab will only be displayed if a Transform generic file format is selected and **Document type** is set to **Check**.

Setup

- Enter the **Profile name** and **Profile description** (both mandatory fields) within **Summary**.
- Select the **Document type**.
- Set **Allow Document discussions** option. See *Enabling Document Discussions*.
- Enter the **File format** from the drop down list for **Import type** within **Source**.
  - Select **Raw data** if you are importing files that will be transformed into final documents by PT-X Connect. See *Projects*.
  - Select **Files** if you are importing files (e.g. PDF) into PT-X Connect that are already formatted and ready to send.

  Note

  The **Files** option is not used by PT-X Connect Plus.
- Within **Defaults**, enter the **Currency**, **Document retention period** (see *Retention Period*), and setting for **Find recipient email address via Contacts.**

Delivery

- Set the **Process automatically** option, see *Sending Documents Automatically*.
- Select the **Default printer** from the drop down list.

- Select delivery method from **Deliver as** option within **Delivery settings** (mandatory).

Method	Description
Document attached to email without link.	Email sent to recipient with document as an attachment, PT-X Connect tracks if the email has been received but does not track if the document has been viewed. **Note** Discussions must be disabled to use this delivery method. See *Enabling Document Discussions*.
Document attached to the email.	Email sent to recipient with document as an attachment, PT-X Connect tracks if the email has been received. If the user clicks on **View Document Now**, PT-X Connect tracks if the document has been viewed. Registered PT-X Connect users will have the option to view the document from the Inbox. Unregistered users will have the option to register as a PT-X Connect user.
Link, no document access code required.	Email sent to recipient, document not attached, no access code required. Tracks if the email has been received. Recipient clicks on link or **View Document Now** to view the document. PT-X Connect tracks if the recipient has viewed the document. Registered PT-X Connect users will have the option to view the document from the **Inbox**. Unregistered users will have the option to register as a PT-X Connect user.
Link with separate document access code email.	Email sent to recipient, document not attached, for extra security an access code is required. PT-X Connect tracks if the email has been received. When the document link is clicked (or the **View Document Now** button), the user is presented with a screen in which they can type an access code, which they will receive in an additional email. **Note** This option is only relevant for users not registered with PT-X Connect.

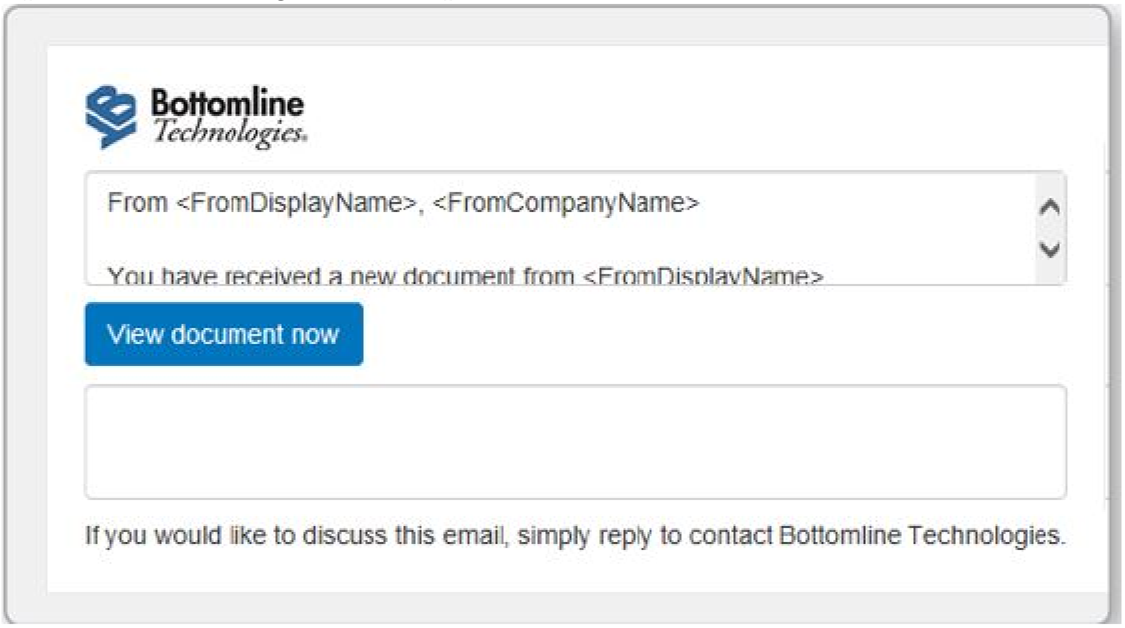
Notes

If you have chosen to send the document as a link, it is possible to override this delivery method for specific email addresses by using **Contacts** to create exceptions.

In order to override the delivery method, create a Contact and select **Always send attachment** on the Contact record. In order to do this you must have **Contact Matching** turned on.

- Enter **Email "from" name** within **Email settings** (mandatory).
- Enter **Email "from" address** within **Email settings** (mandatory). See *Verify Domain*.

- Select the **Email Logo** from the drop down list, see [Logos](#).
- Update the remaining fields as required.

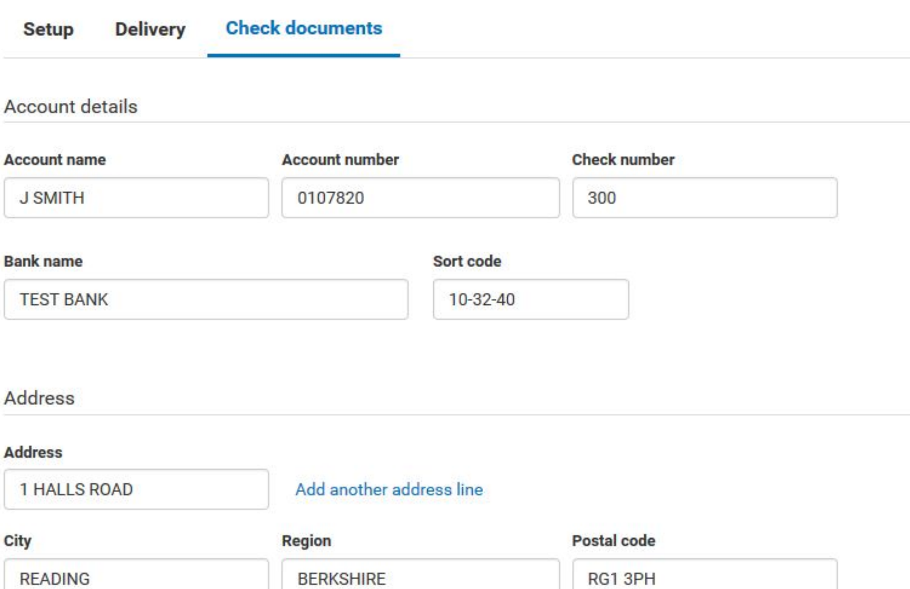


Presentation

For more information regarding the Presentation tab refer to *TFS Projects and PT-X Connect User Guide*.

Check documents

The Check documents tab contains the check information (for example, bank sort code, account number and last used check number) in PT-X Connect to be used when producing check documents.



The **Check number** field is mandatory and contains the last used check number. PT-X Connect will automatically assign the next check number when a new document is created.

Note
It is not mandatory to use the **Check number** field when assigning check numbers in the outgoing document.

Update a Document Profile

To update a profile in PT-X Connect:

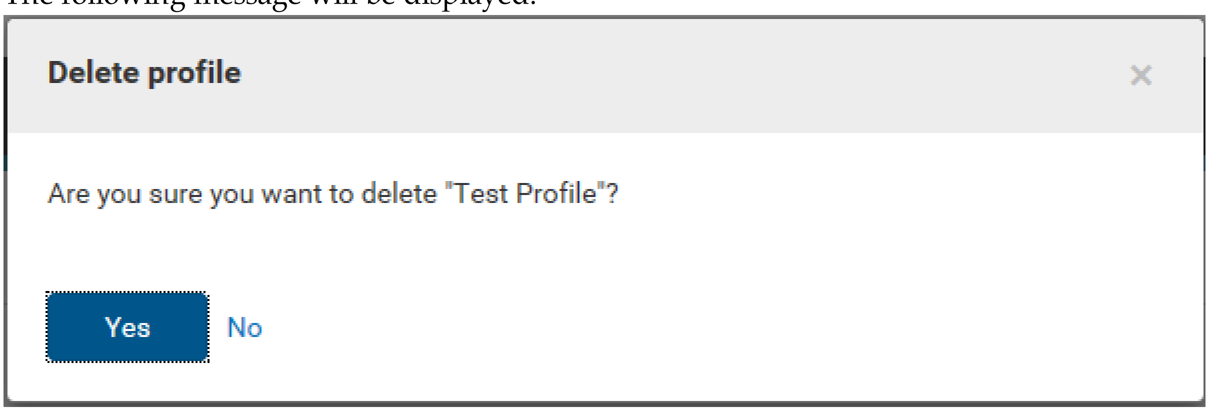
1. Log in to PT-X Connect as a user with administrator privileges.
2. From the settings options at the top right hand corner, select **Document profiles**.
3. From **Document profiles**, select the document profile.
4. Make the required updates to the document profile.
5. Click **Update** to update the document profile or **Cancel** to cancel the changes.

Delete a Document Profile

Note
The **Delete** option will not be available if the profile has been used to upload live documents.

To delete a profile to PT-X Connect:

1. Log in to PT-X Connect as a user with administrator privileges.
2. From the settings options at the top right hand corner, select **Document profiles**.
3. From **Projects**, select the document profile.
4. Click **Delete** to delete the document profile or **Cancel** to cancel the delete request.
5. The following message will be displayed:



6. Click **Yes** to delete or **No** to cancel the delete request.

Retention Period

It possible to specify a retention period within a document profile for the documents held by PT-X Connect. Requests for access to documents falling outside of the retention period should be directed to the sender.

Any batch of documents which have exceeded their retention period:

- Will appear on the **Pending deletion** tab of the Outbox.

> **Note**
> The Pending deletion tab is only visible to users with administrator privileges.

- Will be permanently deleted from the PT-X Connect database after a grace period of a further 3 months.

If a document has exceeded it's retention period, it will not be visible to the recipient. However, during the grace period, the recipient could contact the sender to ask for a duplicate, which the sender can do using the **Print** or **Download** buttons on the **Outbox** or using the print or download icons on the **View document** tab.

The default retention period is 6 months but it may be necessary to increase the retention period depending on a user's business and legal requirements. To extend your document retention period, please contact *info@bottomline.com.*

To specify a retention period:

1. From the settings options at the top right hand corner, select **Document profiles**.
2. Select the document profile.
3. Within **Defaults**, select from the drop down list under **Document retention period**.
4. Click **Save** or **Update**.

Verify Domain

Email deliverability is critical to the successful transmission and sharing of your documents with your customers and suppliers. If a document does not reach the intended recipient then this could mean a missed payment, delivery of goods or essential information not being shared.

PT-X Connect is a hosted service and Bottomline sends emails on behalf of your organization. Each email is signed before it is sent which protects emails from being dismissed as SPAM and by default uses the pt-x.com domain which is automatically verified.

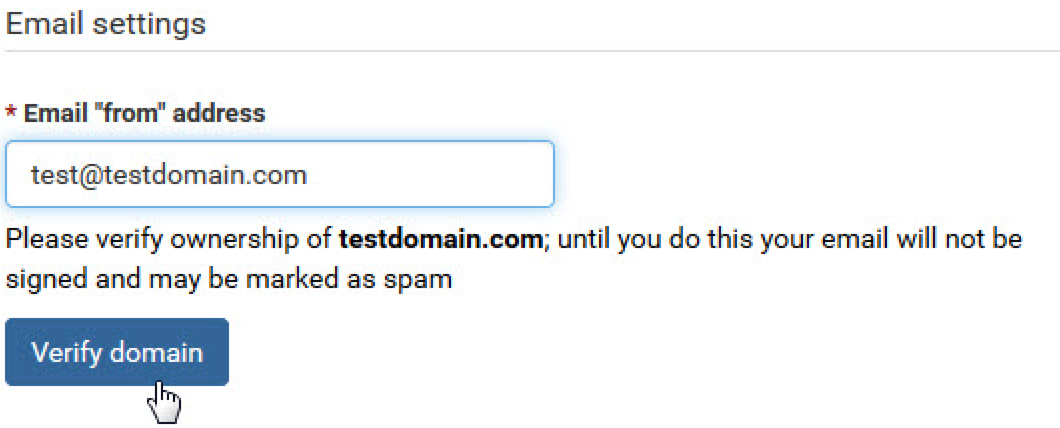
However, it is also possible to use your own domain, making it clear to your customers and suppliers where an email has come from.

In order for emails to be sent from your email address rather than the default noreply@pt-x.com email address, your domain must be verified. This requires changes to your DNS records to authorise PT-X Connect to send emails on your behalf.

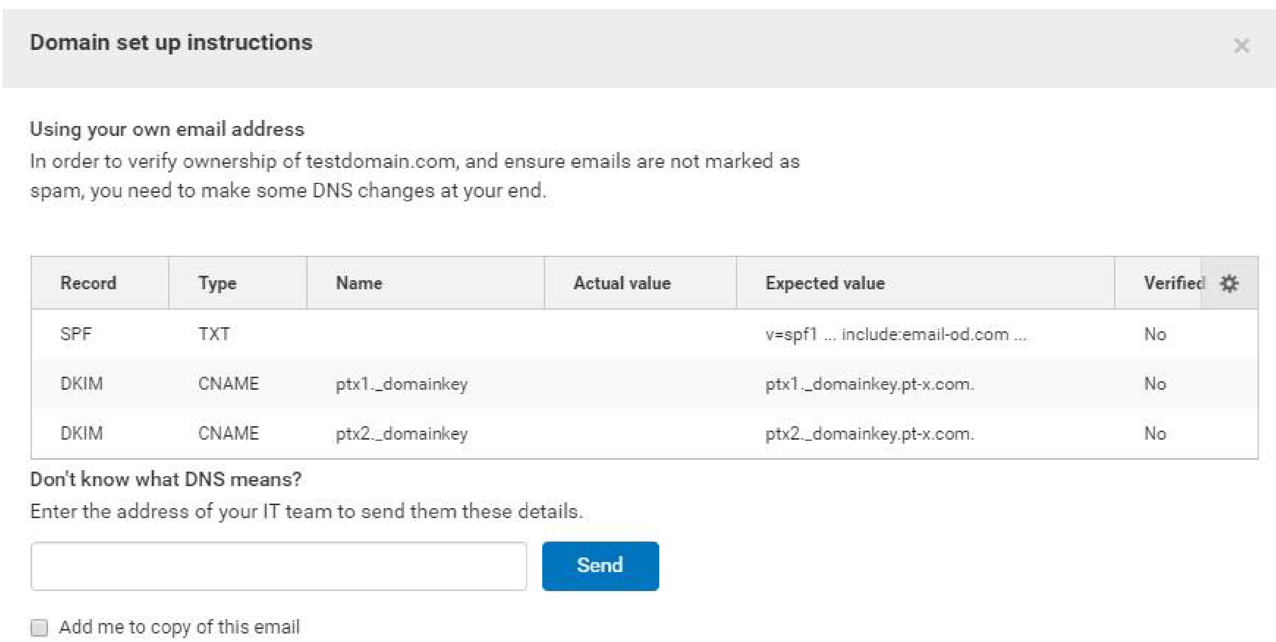
Once verified, emails that are received from PT-X Connect will not contain "via" or "on behalf of".

To verify a domain:

1. From the settings options at the top right hand corner, select **Document profiles**.
2. Select the document profile.
3. Select the **Delivery** tab.
4. Enter an **Email "from" address** within **Email settings**.
5. Click **Verify domain**.



6. The Domain set up instructions screen is displayed.
7. Enter the address of the IT team to send the relevant details to, so the DNS records can be modified for the domain.



8. Click **Update**.

Impact on emails received

Emails sent from the default pt-x.com domain

- Will come from pt-x.com.
- Will not contain "on behalf of" or "via".
- Outlook: *Example Corporation <noreply@pt-x.com>*.
- Gmail: *Example Corporation <noreply@pt-x.com>*.

Emails sent from your verified domain

- Will come from you.
- Will not contain "on behalf of" or "via".
- Outlook: *Example Corporation <noreply@example.com>*.
- Gmail: *Example Corporation <noreply@example.com>*.

Emails sent from your unverified domain

- Will contain "on behalf of" or "via".
- Outlook: *Bottomline PT-X Connect <noreply@pt-x.com> on behalf of Example Corporation <noreply@example.com>*.
- Gmail: *Example Corporation noreply@example.com via email-od.com*.

Sending Documents Automatically

Documents can be sent automatically once PT-X Connect has created them.

To configure documents to be sent automatically:

1. From the settings options at the top right hand corner, select **Document Profiles**.
2. Select the document profile.
3. Under the **Delivery** tab, click **Yes** under **Process automatically**.
4. Click **Update** to save the update to the document profile.

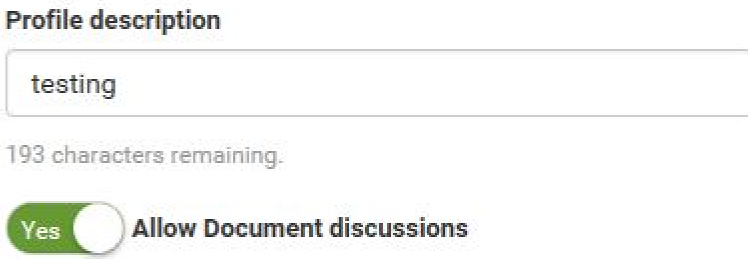
Enabling Document Discussions

Senders and Recipients can now have real-time document discussions through PT-X Connect.

To allow document discussions:

1. From the settings options at the top right hand corner, select **Document Profiles**.
2. Select the document profile.

3. Select **Allow Document discussions**.



4. Click **Update** to save the update to the document profile.

Test and Live Modes

A Document Profile can be saved in **Test** or **Live** mode. Documents that are uploaded using a document profile in test mode cannot be sent and any attempt to send a document will result in a failed status. By saving your profile in test mode you can use it to upload new documents and verify the contents without any risk of accidentally sending a document before you are ready to do so.

When you are happy with your documents you can return to the document profile and switch it to live mode to be used to create and send new documents.

Note

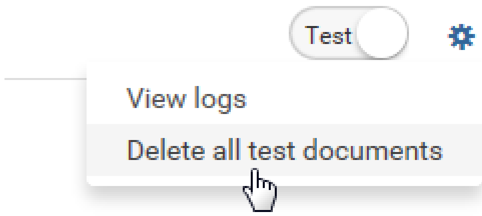
If a user tries to send a document with a test document profile, the only option is to print and send manually.

Removing Test Documents

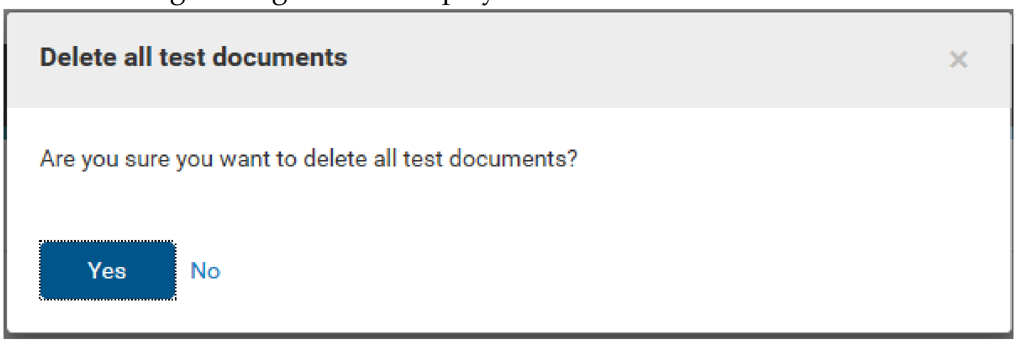
To remove test documents for a document profile:

1. Log in to PT-X Connect as a user with administrator privileges.
2. From the settings options at the top right hand corner, select **Document profiles**.
3. Select a document profile.
4. In the top hand corner of the screen, click .

5. Click **Delete all test documents**.



6. The following message will be displayed:



7. Click **Yes** to delete all test documents or **No** to cancel the deletion request.

Note
Test log files will also be deleted.

Printers

This contains details of all the printers registered with PT-X Connect.

For more information about printers added via PT-X Link, refer to the *PT-X Link Configuration Guide*.

Projects

Projects are configuration files within PT-X Connect Plus and include the file formatting requirements for each input file and the document templates which define layouts and position of the text.

Projects are used by Document profiles, see *Document Profiles* for more details.

For more information regarding creating, viewing, downloading and deleting projects refer to the relevant *Transform/Optio/Create!form Projects and PT-X Connect User Guides*.

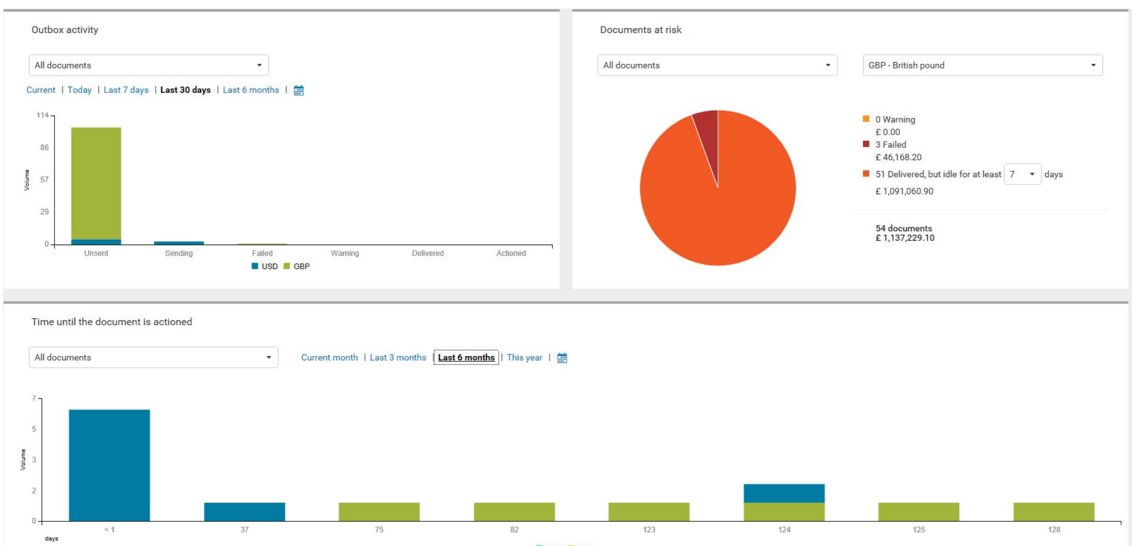
Chapter 8

Insights

The Insights dashboard presents the **Outbox activity, Documents at risk** and **Time until the document is actioned** in color-coded graphs.

To access Insights:

1. Select the **Insights** tab.
2. Select the drop down arrows to change the type of document or currency shown.
3. Select the time frame of the documents to be featured on the screen.



Viewing Logs

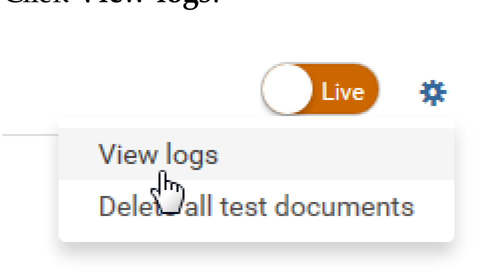
There are two options for viewing logs in PT-X Connect:

1. From a document profile, see *Viewing logs from a document profile.*
2. For a failed job, see *Viewing Logs for a Failed Job.*

Viewing Logs from a Document Profile

To view a log file for a document profile:

1. Log in to PT-X as a Connect user with administrator privileges.
2. From the settings options at the top right hand corner, select **Document profiles**.
3. Select a document profile.
4. In the top hand corner of the screen, click .
5. Click **View logs**.



6. The **Profile logs** screen will be displayed. It contains the following fields:
   - **Name** - name of log file.
   - **Description** - document profile description.
   - **Creation date** - date of log file.
   - **Document counts** - number of documents generated.
   - **Status** - status of the job.
   - **Test mode** - Yes (test mode) or No (live mode)
   - **Download log file** - click to download the log file.
   - **Download input file** - click to download the input file.

   To update the fields displayed on the profile logs screen click the Toggle menu ( ) at the top right hand corner of the screen.