



# PRINT DRIVER USER GUIDE

March 2021



To use the Print2Post Print Driver you MUST have a current Print2Post account up and running.

Install the Print2Post Print Driver on your PC. You will find a link to this on the Print2Post web site -

<http://www.print2postuk.com/printdriver/> - simply follow the instructions.

You must have Webservice Access enabled on your Print2Post account (to check this, go into your Print2Post account and click on 'Enter admin' and then 'My Login details', the box next to 'Allow web service access' should be ticked).

## Integrated Help

When creating your mailing through the print driver, Print2Post will provide you with a help panel if required. By pressing the F1 key on your keyboard, a help panel will be displayed on the mailing creation screen.

By pressing your tab button, the information will change and be specific to the option available on the mailing creation screen.

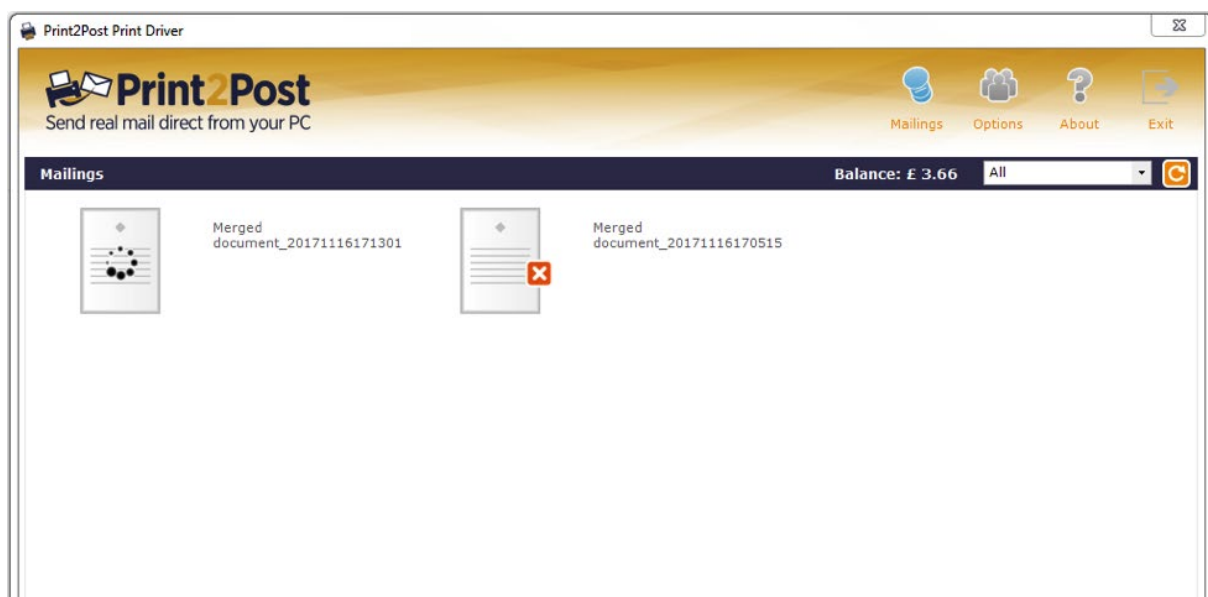
## DOCUMENT

### Create your letter document...

If your document is a PDF, to preserve font information, it is recommended that you drag and drop this straight into the **Print Driver** window. Log in to the Print Driver and you will see this screen. Drag your PDF document into the window and the Print Desktop steps described below will apply.

For any other documents simply select the Print2Post option when you want to print your document and follow the instructions below.

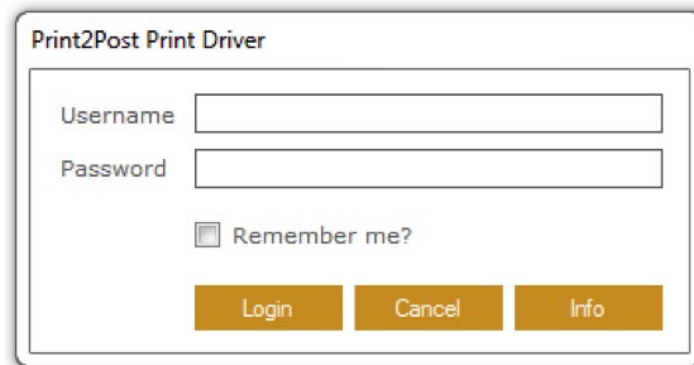
Always remember to check your Print2Post proof before submitting the order.



# PRINT TO PRINT2POST

After installing the Print2Post print driver you can print any document in the same way as you would to your local printer, except from the Windows Print dialog box select "Print2Post" as the printer..

You will be presented with a login screen to log into Print2Post.

A screenshot of the 'Print2Post Print Driver' login window. The window has a title bar with the text 'Print2Post Print Driver'. Inside, there are two text input fields: 'Username' and 'Password'. Below the 'Password' field is a checkbox labeled 'Remember me?'. At the bottom of the window, there are three buttons: 'Login', 'Cancel', and 'Info'. The 'Login' button is highlighted with a blue background.

Clicking 'Remember me' will remember the username and password in the system and they will be completed automatically next time you use the system. The remembered credentials can be edited by choosing the 'Change Credentials' option on the system tray context menu, or by selecting Options on the Print Driver screen.

Clicking 'Info' will supply system information about your print driver.

Click Login and the Print Driver will appear. There are 4 steps to go through:

# MAILING OPTIONS

## Select a Product - (This must be an A3 folded sheet or an A4 letter)

If selecting an A3 product, the file must be supplied as A4 individual sheets, in the correct order so that Print2Post can paginate these for you.

Please note that if you select A3 as your product type this will only allow one A3 folded sheet for each mailing.

The screenshot shows the 'Print2Post Print Driver' window. At the top, there's a header with the Print2Post logo and four main buttons: 'STANDARD DELIVERY', '1 DOCUMENT', '0 ADDRESSES', and 'COLOUR SIMPLEX'. Below these are four sub-buttons: 'Mailing options', 'Add documents', 'Add addresses', and 'Print and post'. The main area is divided into two panes. The left pane shows a preview of a mailing with a blue address window containing the text: 'Print2Post address window', 'Print2Post address window', 'Print2Post address window', 'Print2Post address window', 'Print2Post address window', 'Print2Post address window', 'Mr A Sample', 'A Road', 'Sometown', 'AB1 2CD'. Below the preview is a 'Welcome.' message and a scrollable area with the text: 'This example template is designed to give you some information on how to set'. The right pane is titled 'Mailing options' and contains several fields: 'Profile' (set to '(blank mailing)'), 'Product' (with options for 'A3 folded sheet' and 'A4 document', where 'A4 document' is selected), 'Mailing name' (set to 'Merged document\_20171116170515'), 'Mailing description' (empty), and 'Delivery services' (with options for 'Standard delivery' and 'First class', where 'Standard delivery' is selected). At the bottom right of the right pane is a 'Next' button. The bottom status bar shows: 'User name: elane16 - PC admin: Yes - API available: Yes - Paged memory: 76.95MB'.

## Profile

A profile is a selection of saved options that you have previously set. You may, for example, have one profile that you use for all your single-sided black and white 1st class letters and another for all your colour 2nd class multi-page letters.

Choosing 'blank mailing' will allow you to create a brand new profile. Choosing 'previous mailing' will use the options chosen on your previous mailing through the print driver.

If you have saved profiles you can choose to use one and all the settings for the next steps of the mailing will be pre-loaded for you, saving you time. You can save a profile to use on future mailings by clicking on 'Save Profiles' at the last step of your mailing, when you have viewed your proof, and before and after you have submitted your mailing. You will not be able to save a profile against an order that has been cancelled.

Re-selecting the same profile will reset all current settings back to the original profile's settings.

## Mailing name

You can give your mailing a name to identify it. The Print Driver will add a default mailing name from your filename if you do not wish to add your own.

## Mailing description

You can enter a description of a mailing to help you to identify it. This is optional.

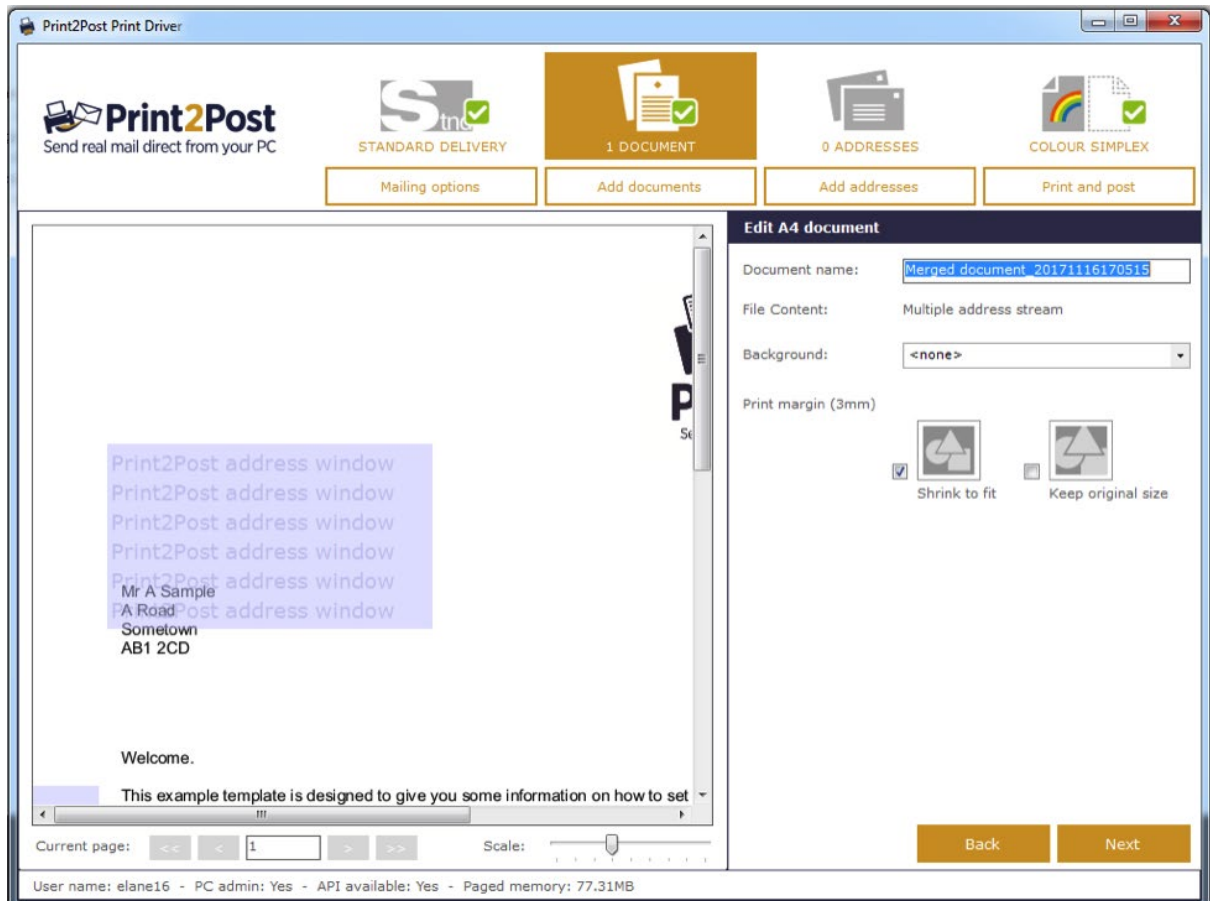
## Delivery services

Choose standard delivery if you want the lowest prices or first class at an additional cost.

Click 'Next' to continue.

# ADD DOCUMENTS

This screen shows details of the document that you are printing -



## Document name

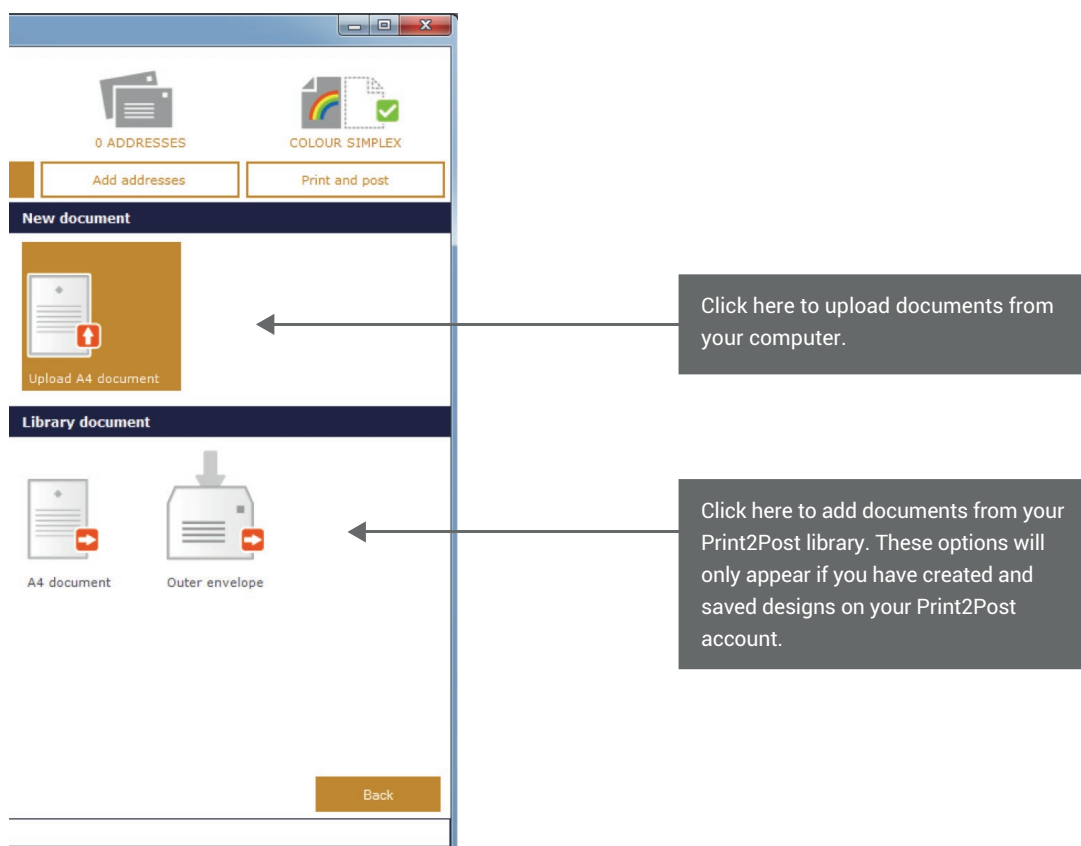
The name input by you, or the automatic reference allocated by Print2Post.

## Background

Backgrounds are used for graphics that require adding behind the first page of your document. Uses include letterheads or adding company information to each uploaded document.

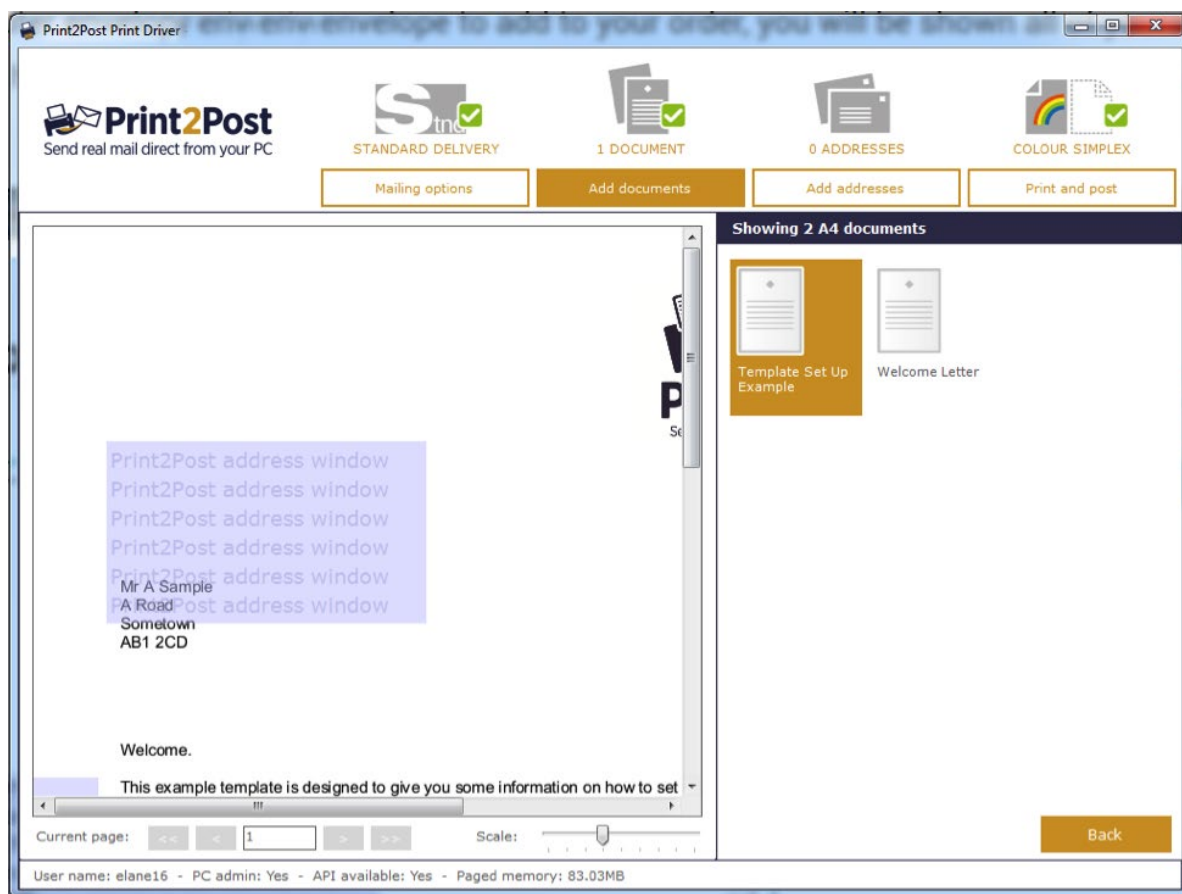
## Print margin (3mm)

Print2Post needs to add this border so you should ensure that you have no text in this area. If there is text it will be cropped off. Do not change this setting unless you need to avoid scaling on your document e.g. if it includes barcodes or if it will be used for optical scanning.



Click on 'Add documents' to upload additional documents, either from your computer or from your library. The documents available in your library may include any envelopes that you have saved.

When selecting an outer envelope or reply envelope to add to your order, you will be shown all of your available designs on screen. If you do not have any saved designs for these in your Print2Post account, the option will not be available.



When you have added all the documents that you want to use on your mailing click on Next or on 'Add addresses'.



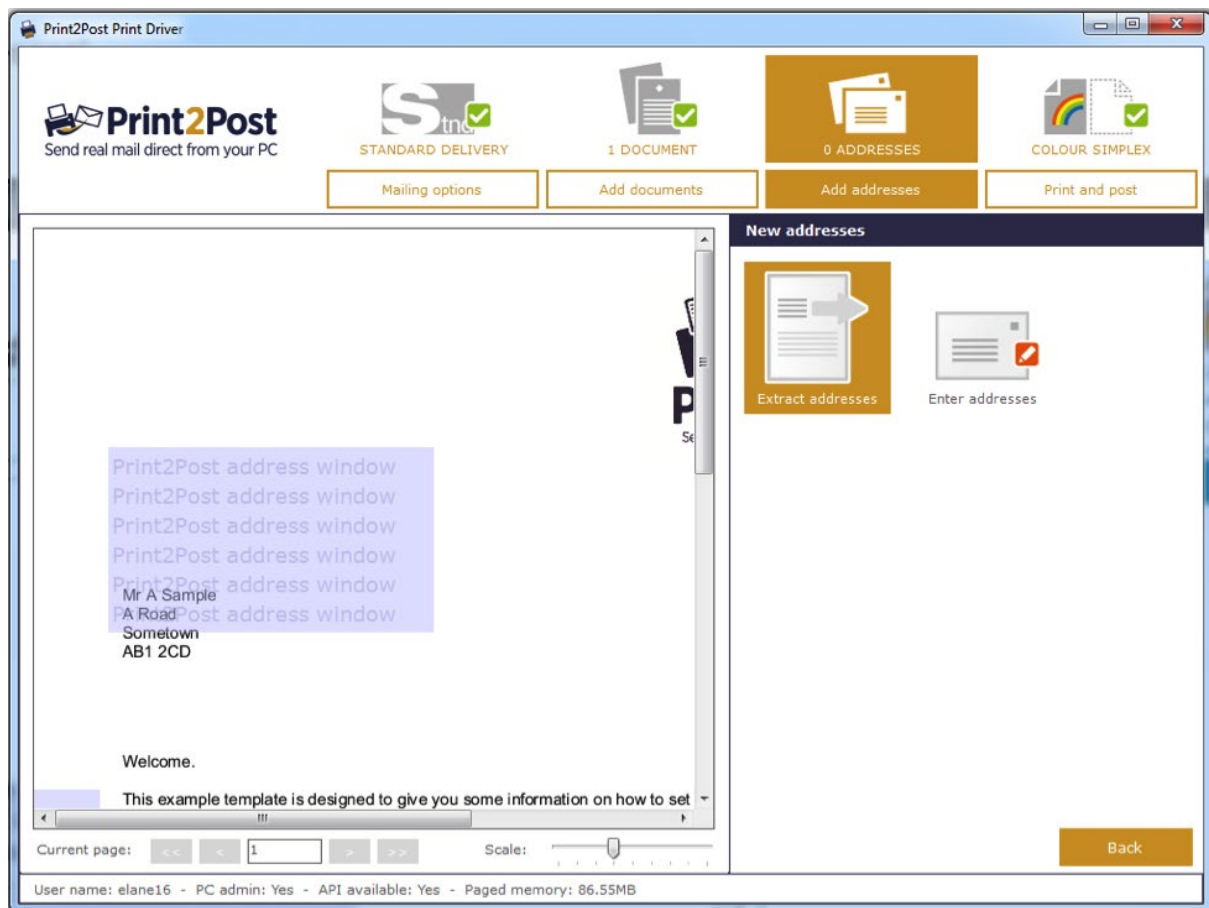
# ADD ADDRESSES

## Extract Addresses

The blue box shows where the address panel will be added, unless you choose not to add an address panel as part of your envelope preference on the print and post step.

On the example shown you will see that the address is not in the box that Print2Post needs to use. This is not a problem as Print2Post can move the address for you.

Click on 'Extract addresses'.



Select the area where the address shows on your document by clicking and dragging across your address. The extracted text will be shown in the box 'Extracted text using PDF'.

## Page identifier logic

You can input logic to tell Print2Post what the first page for each mailing will be.

### Whole document to single address

This extraction method should be used when your document contains only one recipient address. This can be used by the extraction method or add address.

### Fixed number of pages

You can specify the number of pages each recipient will have in their envelope. Your document will need to have two or more recipients in it when using this method for extracting addresses. Print2Post will display how many pages are to be sent to the number of address identified.

The screenshot shows the Print2Post Print Driver window. At the top, there are icons for 'STANDARD DELIVERY', '1 DOCUMENT', '1 ADDRESS', and 'COLOUR SIMPLEX'. Below these are buttons for 'Mailing options', 'Add documents', 'Add addresses', and 'View proof'. The main area on the left shows a preview of a document with a dashed blue box around an address: 'Mr A Sample', 'A Road', 'Sometown', 'AB1 2CD'. The right panel is titled 'Text extraction' and contains the 'Page identifier logic' section. The 'Logic' dropdown is set to 'Fixed number of pages'. The 'Pages' field is set to '1', and the 'Number of estimated recipients' is '1'. Below this, the 'Extracted text using PDF' shows the same address. There are checkboxes for 'Document does not contain address' (unchecked), 'Clear address area on printed output' (checked), 'First line of address is full name' (checked), and a 'Maximum lines to extract' field set to '7'. At the bottom of the right panel are 'Back' and 'Next' buttons. The status bar at the bottom of the window shows 'User name: elane16 - PC admin: Yes - API available: Yes - Paged memory: 80.96MB'.

For example -

- If you had a 50 page document that contains 5 letters, each 10 pages long, then enter 10 as the number of pages.

The pages for an A3 document must be between 1 and 4. The total number of pages including any additional documents must be either 3 or 4 pages.

## Text match logic options

Text match logic options available are -


- ☐ Text Match using 'Text begins with logic'
- ☐ Text Match using 'Text ends with logic'
- ☐ Text Match using 'Text contains logic'

The 'Text match' logic options work by identifying unique words/phrases that only appear on the addressed page of a recipients letter. This allows Print2Post to identify the first page, last page or any unique text that appears in each person's letter and split the file.

- If the match text was "Welcome" and the chosen logic option was 'Text Match' using 'Text begins with logic', Print2Post will search for 'Welcome' in the designated area of each page. If 'Welcome' is identified in this area, Print2Post will class this as the first page of a recipient's letter.
- If the match text logic was 'me' and logic option was 'Text ends with logic', Print2Post will search through all the pages looking for this word to identify the first page of a recipient's letter.
- If the match text was 'Ic' and logic option was 'Text match' using 'Text contains logic', Print2Post will search for 'Ic' in the area designated area. If it exists, this will tell Print2Post that this sheet is the first page of the recipients letter pack.

You must select the designated area for Print2Post to search by clicking and dragging across it. Ensure that the number of pages is set correctly.

Clicking on Advanced Options will offer additional fields. These options will not be needed very often.

Document does not contain address	<input type="checkbox"/>	
Clear address area on printed output	<input checked="" type="checkbox"/>	
First line of address is full name	<input checked="" type="checkbox"/>	
Maximum lines to extract	<input type="text" value="7"/>	

**Text extraction**

**Page identifier logic**

Logic

Pages  Number of estimated recipients: 1

Extracted text using PDF

Mr A Sample  
A Road  
Sometown  
AB1 2CD

<b>Document does not contain address</b>	Check this box if your document does not have an address. You will have an opportunity to enter a recipient address if your document does not contain an address.
<b>First line of address is full name</b>	Tick here if the first line of the extracted address is the recipients full name.
<b>Clear address area on printed output</b>	This will draw a filled white box around the dragged area. This allows a customer address to be printed in a different area of the page, captured and put in the correct place for Print2Post and for the original address to be removed.
<b>Maximum lines to extract</b>	This controls the number of lines of text that will be pulled from the dragged area. The maximum is 7.

When the screen is completed as required click Next.

This screen will be displayed.

These boxes display the recipient full name and address that has been identified in the address area. This can be edited if required. To save your changes, click on 'Update'.

You can click here to use the Address name prefix. This will add text that precedes the address e.g. "To the parent / guardian of".

You can click here to change any extraction option.

The screenshot shows the 'Print2Post Print Driver' window. At the top, there are logos for 'Print2Post' (Send real mail direct from your PC), 'STN' (STANDARD DELIVERY), '1 DOCUMENT', '1 ADDRESS', and 'COLOUR SIMPLEX'. Below these are buttons for 'Mailing options', 'Add documents', 'Add addresses', and 'View proof'. The main area is divided into two panes. The left pane shows a preview of a mail piece with a dashed box around the address area containing the text: 'Print2Post address window', 'Print2Post address window', 'Print2Post address window', 'Print2Post address window', 'Print2Post address window', 'Mr A Sample', 'A Road', 'Sometown', 'AB1 2CD'. The right pane is titled 'Extract addresses' and contains an 'Update' button, a text field for 'Extracted text logic: 1 page per address', and an 'Address name prefix' field. Below this is a list of 'Recipients - 1 address extracted' showing 'Mr A Sample, A Road, Sometown, AB1 2CD'. At the bottom of the right pane is the 'Current address' section with fields for 'Full name' (Mr A Sample) and 'Address' (A Road, Sometown, AB1 2CD), and an 'Update' button. At the very bottom of the window are 'Back' and 'Next' buttons. Annotations with arrows point from the text boxes to the 'Update' button in the 'Extract addresses' section, the 'Address name prefix' field, and the 'Update' button in the 'Current address' section.

Click Next to be taken to the next stage.

## Enter addresses

Click Enter addresses to input addresses manually. Use this option if your letter does not have an address at the top.

You can amend or delete addresses by clicking on the one that you want to change and using either of these buttons.

Enter the names and address that you want to use in these boxes by clicking on 'Add another' between each name and address.

You can click here to use the address name prefix. This will add text that precedes the address e.g. "To the parent / guardian of".

Print2Post address window  
Print2Post address window  
Print2Post address window  
Print2Post address window  
Print2Post address window  
Mr A sample  
A Road  
Sometown  
AB1 2CD

Welcome.

This example template is designed to give you some information on how to set

Current page: << < 1 > >> Scale: [Slider]

User name: elane16 - PC admin: Yes - API available: Yes - Paged memory: 78.96MB

Address name prefix

Pages	Recipient
1	Mr A sample, A Road, Sometown, AB1 2CD

Current address

Pages in set 1

Full name

Address  
Mr A sample  
A Road  
Sometown  
AB1 2CD

Update address Delete address

Back Add another Next

When manually entering addresses, you can specify how many pages each person has in their envelope. This can be done by changing the 'Pages in set' option. This will default to one.

The 'All remaining' option allows you to specify whether the remainder of file belongs to one recipient once you have allocated/entered at least one address.

When you have entered all the names and addresses that you require, click on Next.

# PRINT & POST

The Print and Post section allows you to choose how your document is printed.

The screenshot shows the 'Print2Post Print Driver' window. At the top, there are four main sections: 'STANDARD DELIVERY' (with a 'tns' logo), '1 DOCUMENT', '1 ADDRESS', and 'COLOUR SIMPLEX'. Below these are buttons for 'Mailing options', 'Add documents', 'Add addresses', and 'View proof'. The main area is divided into two panes. The left pane shows a preview of a letter with a blue address window containing the text: 'Print2Post address window', 'Print2Post address window', 'Print2Post address window', 'Print2Post address window', 'Print2Post address window', 'Mr A Sample', 'A Road', 'Sometown', 'AB1 2CD'. Below the address is a 'Welcome.' message and a scrollable text area with the text: 'This example template is designed to give you some information on how to set'. The right pane is titled 'Print and post' and contains 'Print options' (with checkboxes for 'Black & White Simplex (Single sided)', 'Black & White Duplex (Double sided)', 'Colour Simplex (Single sided)', and 'Colour Duplex (Double sided)'), 'Despatch' (with a checkbox for 'As soon as possible' and a 'Select date' button), and 'Envelope preference' (with a 'Standard - returns not managed' option). At the bottom, there are 'Back' and 'View proof' buttons. The status bar at the very bottom shows: 'User name: elane16 - PC admin: Yes - API available: Yes - Paged memory: 80.06MB'.

## Print options

Tick the boxes to choose whether your letter is printed in black & white or colour, and on one or both sides of paper

## Despatch

Choose a despatch date for your letters or leave the date as shown for despatch to take place as soon as possible. (The earliest date is shown.)

## Envelope preference

Select standard envelopes for the cheapest envelope option or alternatively you can choose between window envelopes or adding a custom designed envelope.

You can choose from one of the following outer envelope options:

### ☐ **Standard envelopes**

If you choose standard envelopes Print2Post will produce your documents at the most suitable location for your output - for example Scotland output will be produced in Scotland. We will use either standard Print2Post window or non-window envelopes as available at that location.

If you select to use your own return address with standard envelopes then only non-window envelopes will be used.

### ☐ **Window envelopes**

If you choose window envelopes then Print2Post will produce all your documents in window envelopes.

### ☐ **Custom design envelopes**

Design your own closed face envelope (non-window) including images, personalised text and your own return address.

## Returns

When items cannot be delivered they are returned to Print2Post. If returns are not managed then they will be securely destroyed.

If you select returns to be managed then return addresses will be entered into the system before the item is destroyed and will be visible via the returns management page in the admin section.

If you wish to handle your own returns then you can enter your own return address.

## Address panels

If you are using a custom design envelope or a standard envelope with your own return address you can choose not to have an address panel added to your output document. For other options an address panel must be added to your document.

If you are using a custom design envelope or using your own address for returns the options are –

### ☐ **Add to output document**

### ☐ **No address panels**

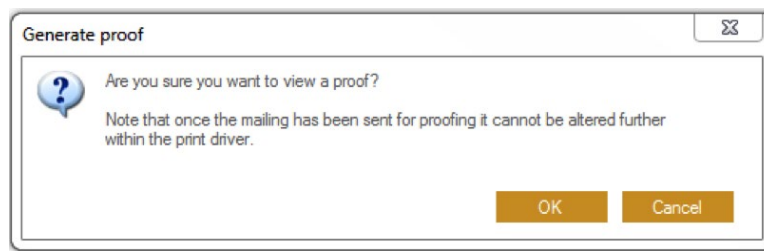
If you select 'Add to output document' your document will have the address showing and can go into a window envelope. If you select 'No address panels' no address will be shown on the document.



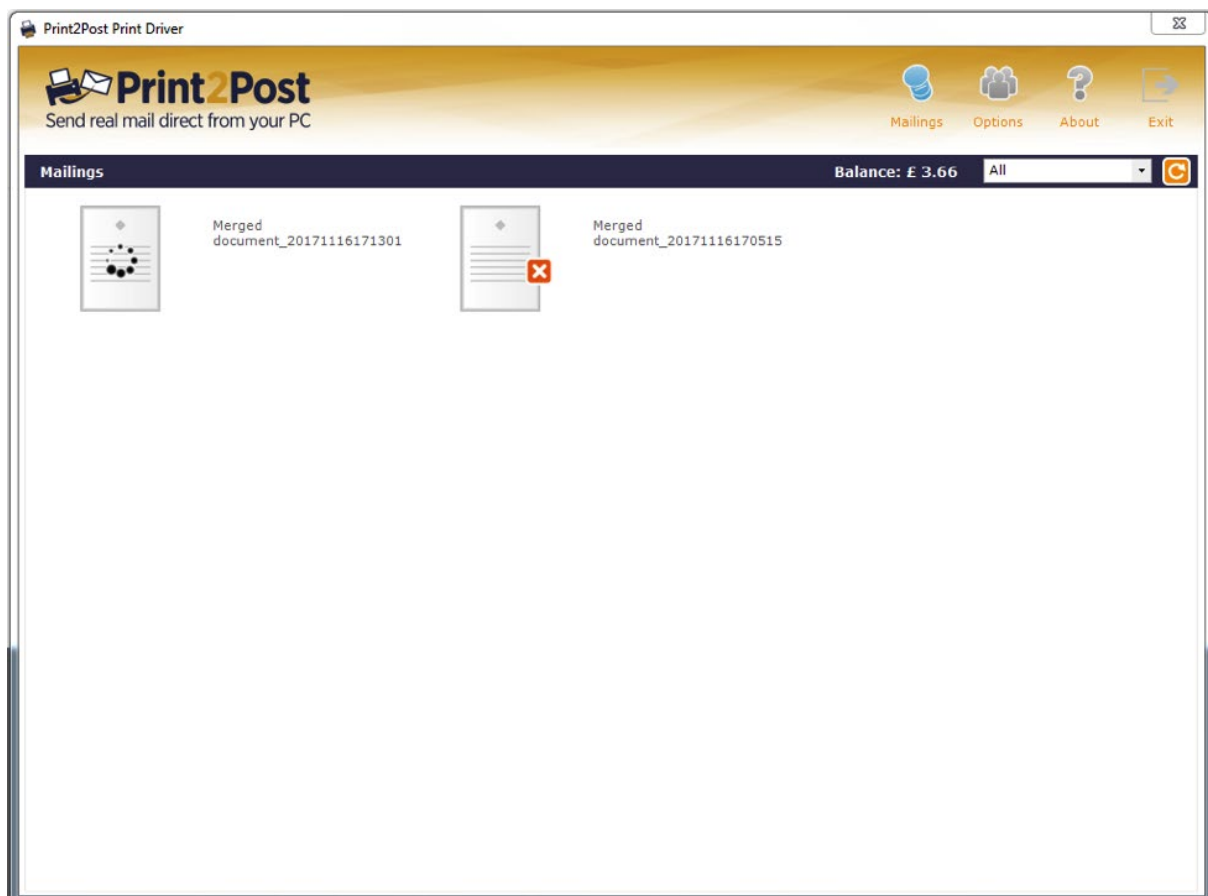
## Envelope Design

This shows you the design of your envelope and if you have selected 'Use own return address' there will be a panel which will show the return address that is held in your account information. This can be overwritten if required.

When you have completed the screen click 'View proof'. A box will pop up warning you that you will not be able to change your document once the proof has been generated. Cancel if you think you want to make further changes or click on OK to proceed.



You will be directed to the Print Driver dashboard where you can click on your created order to view the proof.



This is the screen that will be displayed. Click on an address to view the proof.

The screenshot shows the 'Print2Post Print Driver' window. At the top, the logo 'Print2Post' is displayed with the tagline 'Send real mail direct from your PC'. Navigation icons for 'Mailings', 'Options', 'About', and 'Exit' are in the top right. The main section is titled 'View proof' and contains a 'Printed Proof' area with a sample address: 'Mr A sample', 'A Road', 'Sometown', 'AB1 2CD'. Below the proof is a note: 'Printed and posted 2nd class (postal surcharge)'. A warning message states: 'Please note: Ensure you check the proof carefully, paying particular attention to white boxes that may be added behind the recipient's address or behind barcodes. If you haven't left enough room some of your document may be obscured.' Below this is the 'Mailing details' section, which includes a discount code field, an 'Apply discount' button, and a table of costs: Cost (£0.54), VAT (20%) (£0.11), and Total cost (£0.65). To the right of the cost table, other details are listed: Order ref (14867633), Product (A4 Letter), Status (Awaiting approval), Mailing name (Merged document\_20171116171301), Mailing description, Mailing created (16/11/2017 17:13:06), and Address count (1). At the bottom, there are four buttons: 'Save profile', 'Cancel mailing', 'Back', and 'Approve and submit'.

Mailing details	
Discount code	<input type="text"/>
	<button>Apply discount</button>
Cost	£0.54
VAT (20%)	£0.11
Total cost	£0.65
Order ref	14867633
Product	A4 Letter
Status	Awaiting approval
Mailing name	Merged document_20171116171301
Mailing description	
Mailing created	16/11/2017 17:13:06
Address count	1

If you would like to save your profile, you can click on Save Profile where you will be prompted to enter a profile name. Saving the profile will allow you to use the same mailing settings on future orders.

You will be displayed random samples from your mailing along with the mailing details and cost of the order.

If you are happy with the proof click on 'Approve and submit'. Another warning will be shown.

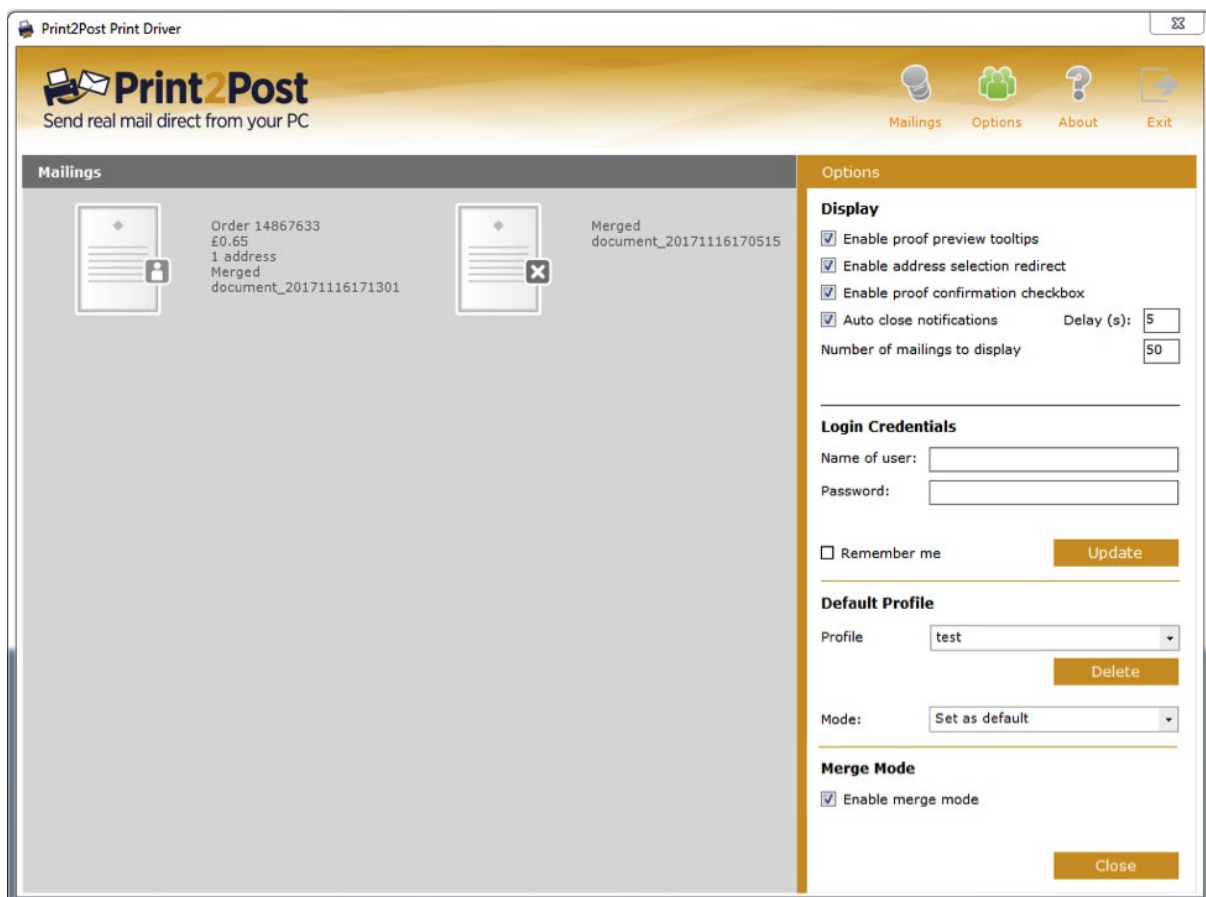
The screenshot shows a confirmation dialog box titled 'Are you sure?'. It contains a question mark icon and the text: 'Please ensure that you check your proof carefully and that the number of addresses meet your required number of recipients printed. Once the order is placed, this action cannot be reversed. Do you still want to proceed with placing this order?'. At the bottom right, there are two buttons: 'Yes' and 'No'.

If you are happy to proceed, click on 'Yes' and your order will be submitted. The mailing status will be updated to 'Submitted (Awaiting production)'.

If you choose to cancel the order prior to production, it will then be cancelled on Print2Post.

## Enabling Automation through the Print Driver

You can use the Options icon to choose various settings on the Print Driver screen. You can select a default profile from a drop down list of all current profiles.



If a default profile is selected when you next print to Print2Post it will auto-populate the profile box at the first step on the screen.

When a default profile has been selected a box labelled 'Mode' will appear and there will be an option on the drop down selection to automate the Print Driver. If this is selected when you print to Print2Post the system will automatically run through all the steps, with no user interaction, until you check your proof and select 'Approve and Submit' to complete your mailing.



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