PDFBLASTER

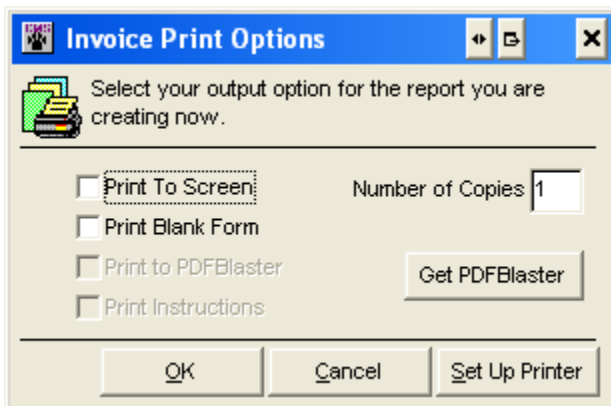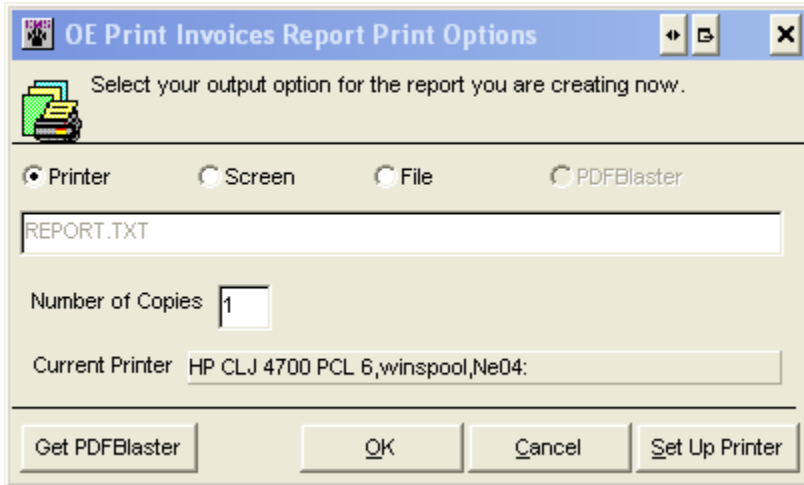intelligent document delivery from accounting

PDFBlaster
QuickStart Guide

For Cougar Mountain Software

Revised: 8/7/2008

Installing PDFBlaster

After installing Cougar Mountain Software 2009, when you print a document you will see one of the following two windows:

Select the Get PDFBlaster button to take you to the following website to install your free version of PDFBlaster Lite. If you don't see the button and you have the Print to PDFBlaster option then you already have PDFBlaster Lite installed:

http://www.cougarmtn.com/pdfblaster/download/

Make note of the Activation Code since you'll need to enter it to activate the product and then select the Begin Download button to start your install.

You will be presented with the screen show above. Click Next to continue.

When asked, Click the "I accept the terms in the License Agreement" option.

Then, Click Next to continue.

Then, Choose the folder location where you want PDFBlaster to be installed. The default, which is suggested for most users, is C:\Program Files\DataFab\PDFBlaster.

Click Next again to continue.

Finally, Click the Install button to begin the installation.

Completing the PDFBlaster Setup Wizard

Once the PDFBlaster setup wizard has completed you may be prompted to reboot your computer in some cases. If this happens be sure to reboot your computer immediately to ensure that the PDFBlaster installation completes successfully.

If you don't need to reboot, you'll have the option to launch PDFBlaster by checking the appropriate check box or by clicking Start -> Programs -> PDFBlaster -> PDFBlaster Control Panel.

Click Finish to complete the installation.

Starting PDFBlaster For the First Time
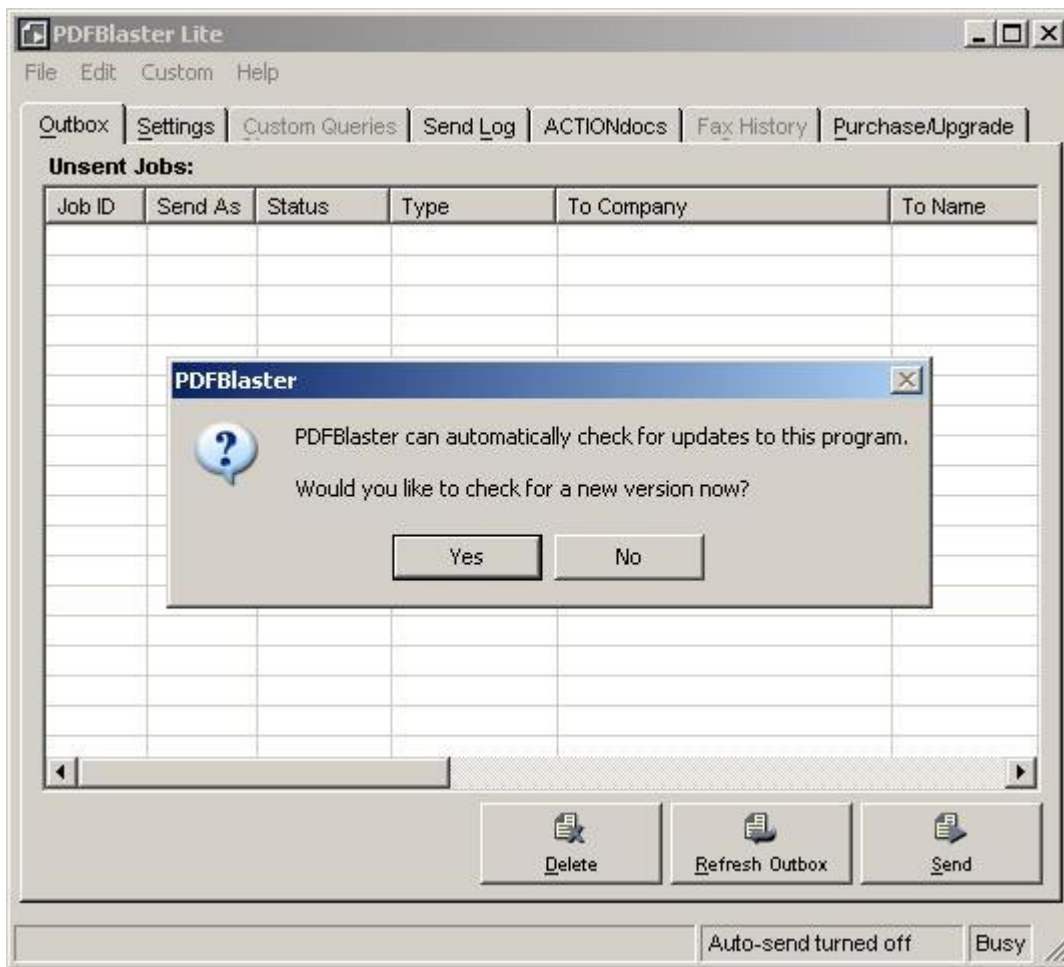
The PDFBlaster Control Panel can be started from your Windows Start menu. Look for Start -> Program Files -> PDFBlaster -> PDFBlaster Control Panel and click on this link when you find it.

When PDFBlaster starts up for the first time, it will ask you if you want to check for updates to this program. Click "No" for now.

NOTE: In the future, It's a good idea to click "Yes" to check for any updates. This way you can be sure you have the latest version of the PDFBlaster software. If you select "No", PDFBlaster will remind you every 30 days to check for updates.

Select Your Accounting System
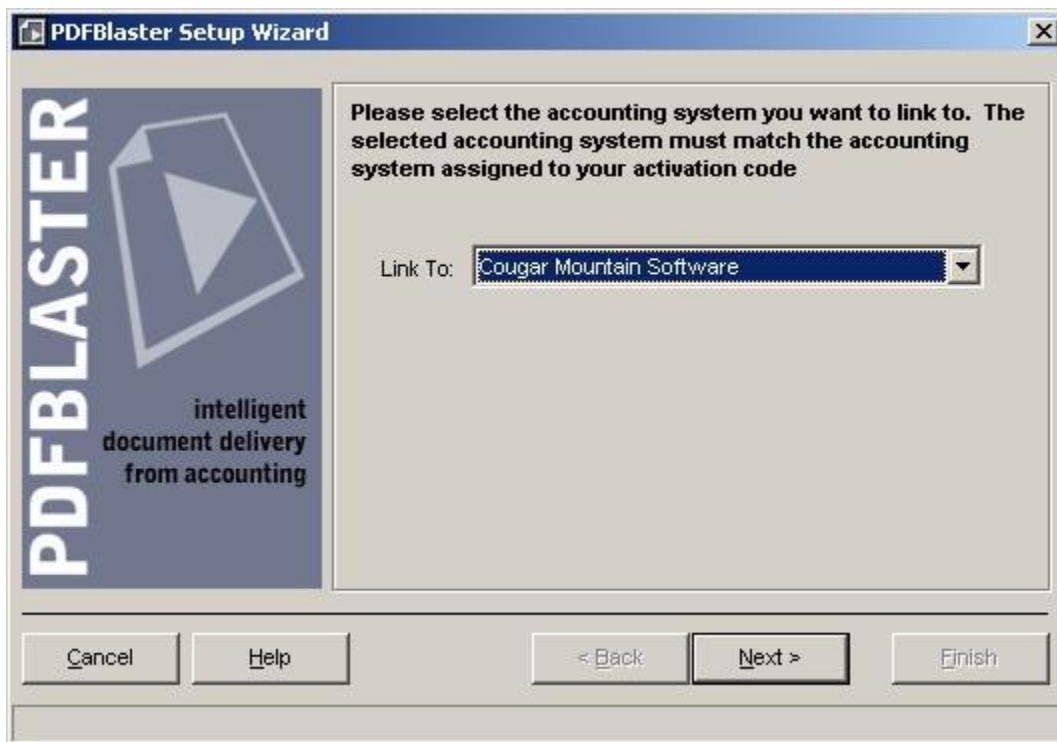
If this is the first time you are running the PDFBlaster Control Panel, you will asked to complete a quick 5 step setup wizard that will help you link PDFBlaster to your accounting system and activate your software.

The first step is to select your accounting system from the drop-down list.

Choose Cougar Mountain Software

Click the Next button

Linking To Your Cougar Mountain Software Database

(You will only see the screen shown below if you have purchased the full version of PDFBlaster. PDFBlaster Lite users will not see this screen.)

The settings required in this step are similar to those used by your Cougar Mountain Software system. You will need to select a Cougar Mountain Software system directory, which may be located on your local computer or on a shared network drive.

If you don't know this information, please contact your network administrator for the necessary settings.

Click the Browse button, denoted by the three small periods, to continue.

Selecting A Office Accounting Data File

(You will only see the screen shown below if you have purchased the full version of PDFBlaster. PDFBlaster Lite users will not see this screen.)
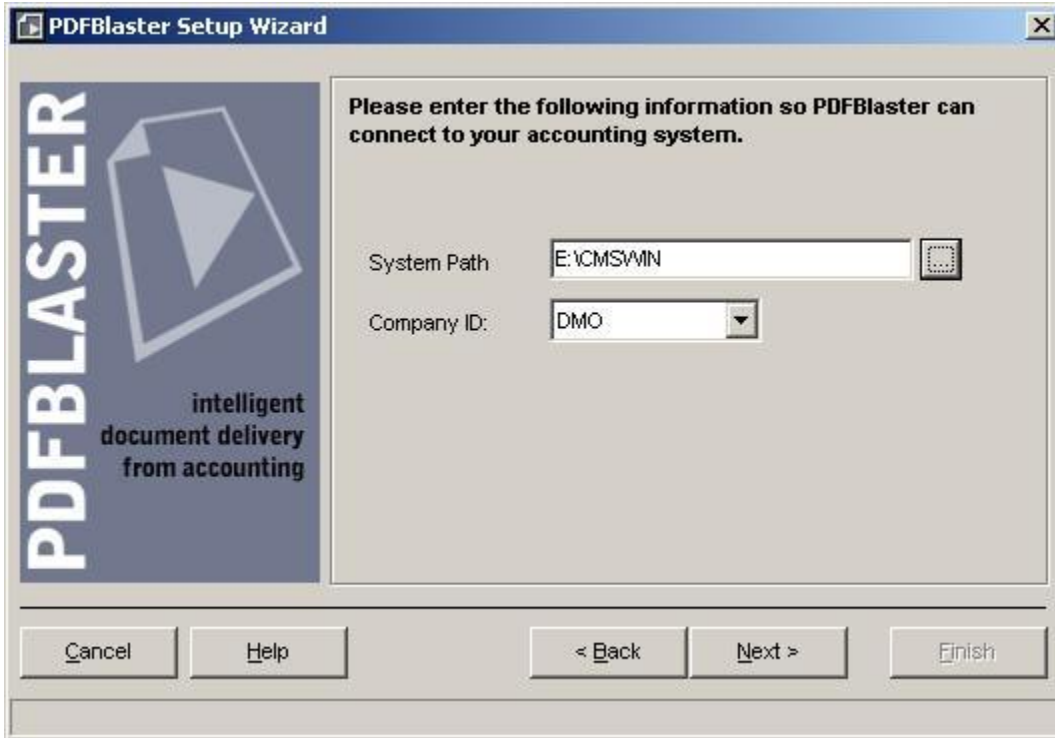
Browse to the correct Cougar Mountain System Folder and click OK. Next, PDFBlaster will automatically populate the Company ID dropdown with a list of available companies in your Cougar Mountain Accounting System.

If you don't know this information, please contact your network administrator for the necessary settings.

Select the appropriate company ID from the dropdown and click Next to continue.

Testing Your Accounting Database Link

Click the Test Link button to test the link between PDFBlaster and your accounting system.

If the information you entered is correct you will see a "Connection Succeeded" result message like the one shown above

If the test link fails, most likely you have entered in incorrect accounting database information. Please contact your network administrator to obtain the correct settings.

Click the OK button to dismiss the Connection Succeeded dialog.

Click the Next button to continue

Entering Your Personal Contact Information

If your link to your accounting system was successful, your From Company name should be pre-filled. You can override this value by typing in your Company name as you wish it be viewed when sending faxes and emails through PDFBlaster.

Enter your From Name, which is typically your personal name. However, you may want to use a more generic from name such as "ABC Sales" if you want to not have your own name appear in faxes and PDF Emails.

Enter your from email address, which is typically your own company email address. Again, if you elect to use a more generic from name, you can change this from email setting to match an email alias that has been set up on your mail server, such as sales@abcdistributing.com.

Entering Your PDFBlaster Activation Code

```
[ PDFBlaster Setup Wizard                                        X ]

 P                     Please enter your assigned software activation code. You
 D                     must be able to connect to the Internet to proceed past this
 F                     step.
 B
 L
 A
 S                     Activation Code:  99999-999999
 T
 E
 R
         intelligent
    document delivery
    from accounting

 [ Cancel ]  [ Help ]           [ < Back ]  [ Next > ]  [ Finish ]
```

Please enter the activation code provided to you from the download web site, or from your PDFBlaster reseller. Make sure you enter the number exactly as it is provided, including the dash.

Click Next to continue.

After entering your activation code you will see a screen indicating that your activation code has been accepted by the system.

Then, Click the Finish button to exit the wizard.

NOTE: Important Note about failed activation attempts:

If you software activation attempt fails, it is most likely due to one of the following scenarios:

You entered an incorrect activation code
You entered a valid activation code but are linking to an accounting system that is different than the one you signed up for
You exceeded the allowable license count limit for your account.

If you are not using the full version of PDFBlaster, you can only install PDFBlaster on a single workstation. If you have already purchased PDFBlaster, then you may have run out of available license activations, in which case you will need to purchase more license activations.

## Printing To PDFBlaster From Cougar Mountain Software
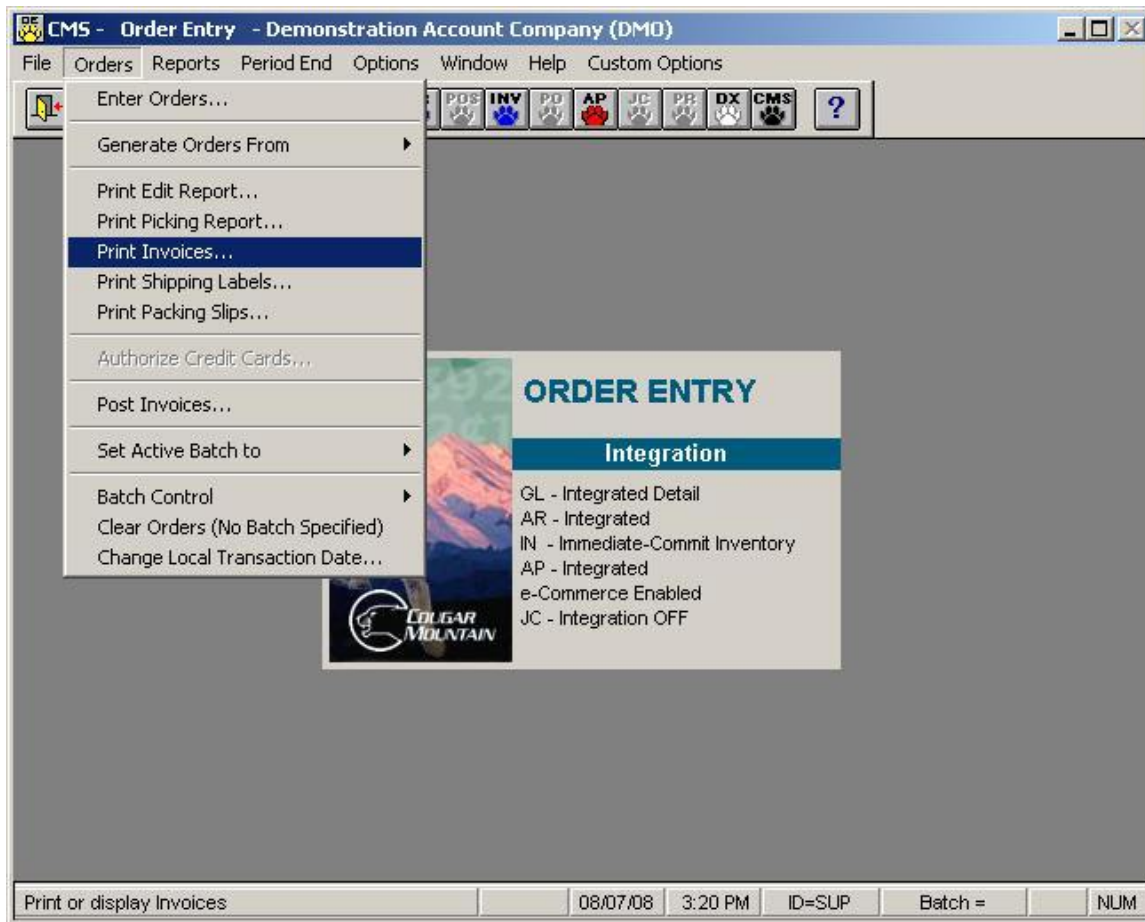
Once your PDFBlaster Control Panel is linked to your accounting system and configured correctly, all you need to do is print your accounting documents (invoices, statements, purchase orders, etc.) from your accounting system and select the PDFBlaster printer as the selected printer.

For example, suppose you want to send out your invoices Cougar Mountain's Order Entry Module. Click the Orders menu and then select Print Invoices, as shown above.

Printing To PDFBlaster From Cougar Mountain Software

Choose from the various invoice filtering options in the next screen, such as Print Type, starting and ending Customer Number or starting and ending Invoice Number.

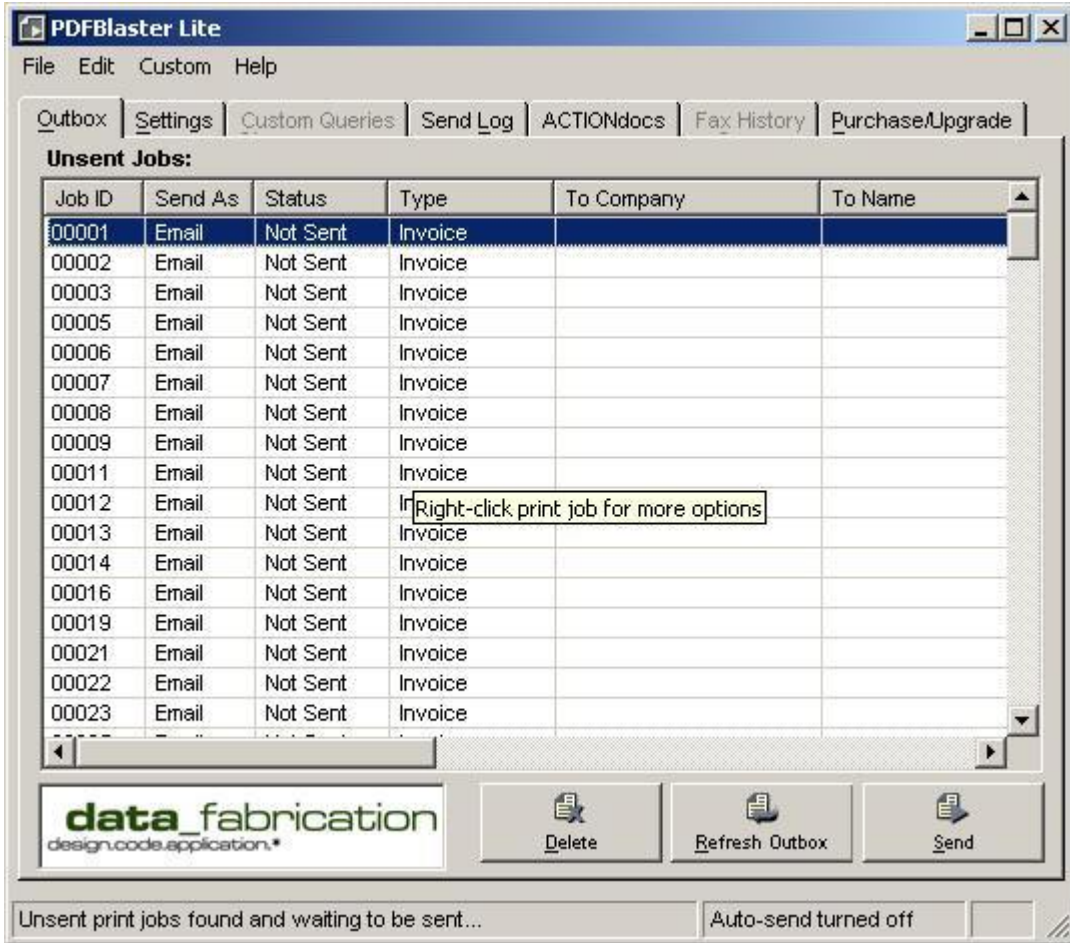Select OK and you will see one of the following Print Options windows:
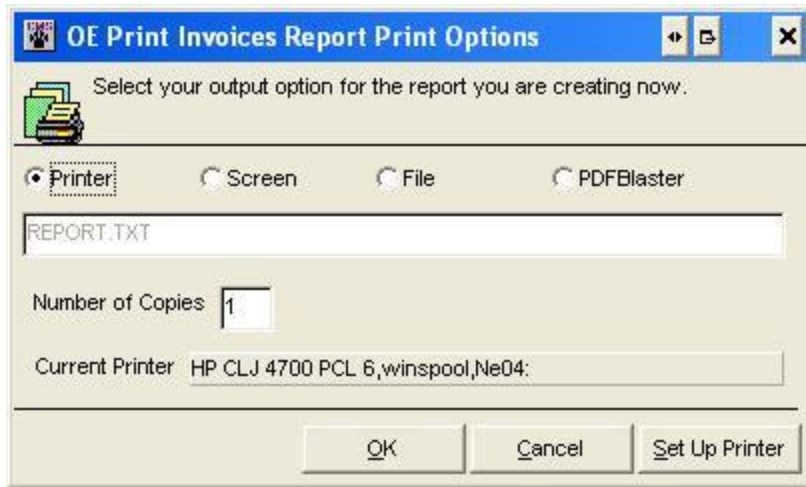
To send your Invoices or other report or print job to PDFBlaster, select the Print to PDFBlaster check box or select the PDFBlaster option and click OK to start printing.

As your sales order jobs are received by the PDFBlaster Control Panel, PDFBlaster will automatically pre-address each sales order in your outbox for you. If the control panel does not open automatically you may need to go to your Start > Programs to bring up the control panel shown below.

Printing To PDFBlaster From Cougar Mountain Software

Highlight the first job and then click the Send button.

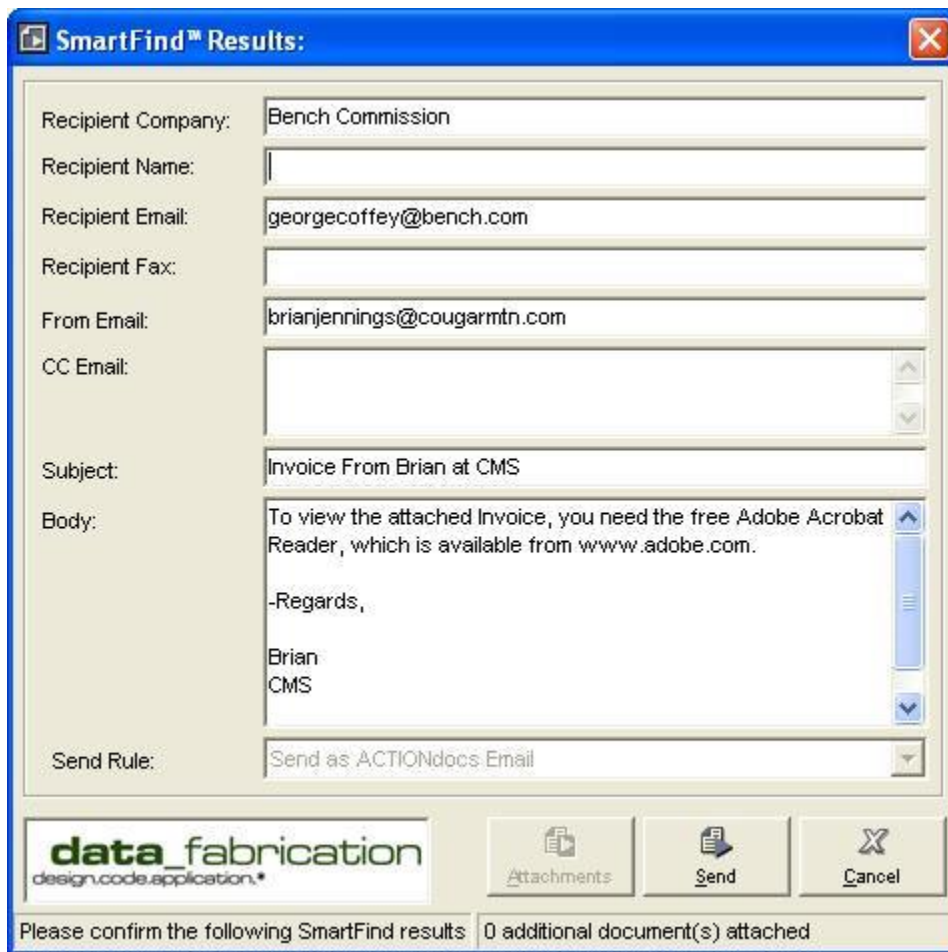| Job ID	Send As	Status	Type	To Company	To Name
00001	Email	Not Sent	Invoice		
00002	Email	Not Sent	Invoice		
00003	Email	Not Sent	Invoice		
00005	Email	Not Sent	Invoice		
00006	Email	Not Sent	Invoice		
00007	Email	Not Sent	Invoice		
00008	Email	Not Sent	Invoice		
00009	Email	Not Sent	Invoice		
00011	Email	Not Sent	Invoice		
00012	Email	Not Sent	In	Right-click print job for more options	
00013	Email	Not Sent	Invoice		
00014	Email	Not Sent	Invoice		
00016	Email	Not Sent	Invoice		
00019	Email	Not Sent	Invoice		
00021	Email	Not Sent	Invoice		
00022	Email	Not Sent	Invoice		
00023	Email	Not Sent	Invoice		

As your sales order jobs are received by the PDFBlaster Control Panel, PDFBlaster will automatically pre-address each sales order in your outbox for you.

Highlight the first job and then click the Send button.

Printing To PDFBlaster From Cougar Mountain Software

Since your send option was set to "send each print job individually" and "confirm each job" you will be presented with the SmartFind Results confirmation screen shown above. You can select the Settings tab to change send the jobs automatically without confirming but the option to send print jobs automatically is only available in the full version. At this point you can select the defaulted recipient and send rule settings, or overwrite them with your own, change the send rule for this job from the drop-down or edit the body of the message (which will appear in the email or on the fax cover sheet).

Now all you have to do is click the Send button to deliver your print job.

After your print job is sent, and entry is added to the Send Log tab, which you can view, print to clear at any time.

Support and Purchasing

To Obtain Additional Technical Support

Visit our online support site at www.pdfblaster.com/support
Email us at support@pdfblaster.com

To Purchase or Upgrade PDFBlaster

If you are using the free PDFBlaster Lite software, consider upgrading your PDFBlaster software now and immediately enjoy these powerful benefits:

- Send unlimited ACTIONdocs Emails or faxes with your paid account
- Add multiple users and computers to your account
- Combine all documents for each recipient into one PDF
- Complete integration with Customer and Vendor files
- Print and send all accounting system reports and forms
- Print and send print jobs from any Windows application
- Integration with Microsoft® Word and Outlook
- Access to enhanced document security features
- Send unlimited Fax/Email Broadcasts
- Access to advanced ACTIONdocs dashboard for online document management and reporting.

Contact our sales hotline at 312.264.2378
**Email us at sales@pdfblaster.com**
Or click the [Purchase/Upgrade] tab on the main screen of your PDFBlaster Control Panel

Extra Information

The following pages will give you some extra information about the PDFBlaster interface and some advanced options you have with the full version.

These items are all optional, and you don't need to configure any of these things to start sending your first trial faxes and emails.

The PDFBlaster Control Panel
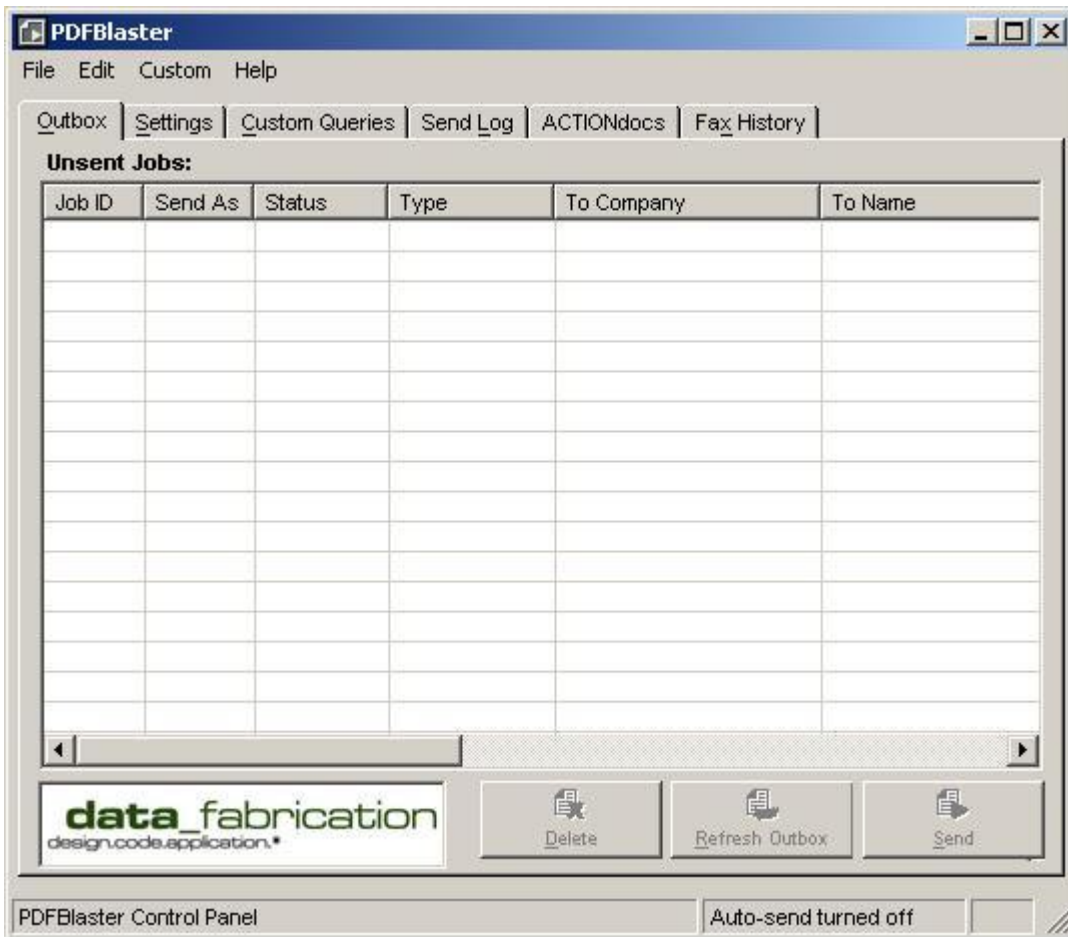
PDFBlaster uses an "outbox metaphor" to receive print jobs from the PDFBlaster printer. These jobs will show up in your outbox screen, shown above and identified by the outbox tab at the top. Depending on your Send Rule settings, print jobs will either queue up in your outbox until you send them yourself or they will automatically be delivered as they are received. Please see the next section for more information.

The PDFBlaster Settings Tab
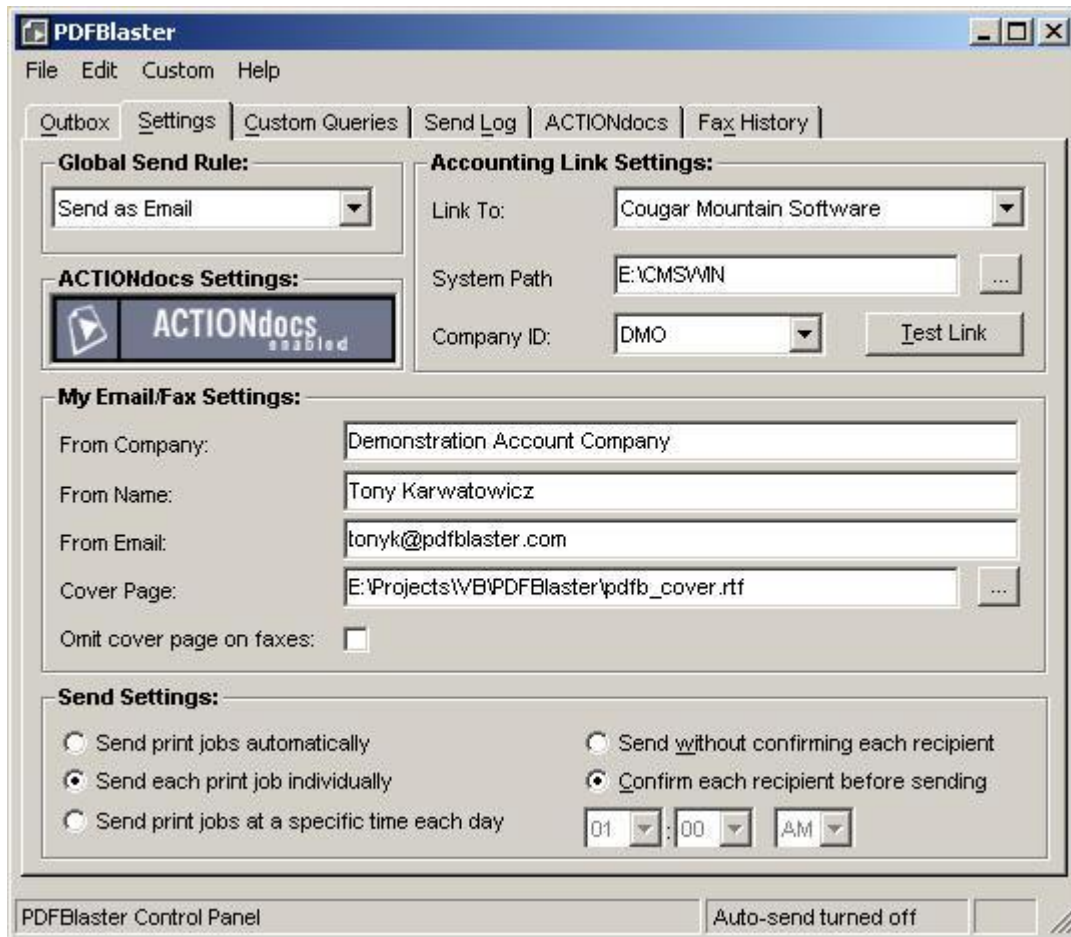
The PDFBlaster Settings tab contains settings that control how you want to process print jobs in your outbox.

The Global Send rule defines your top-most preference for sending out print jobs, and these can be a combination of fax, email and hard-copy printing. Depending on the recipient data of a particular job, different send methods may be used. For example, suppose you have an invoice that will be sent to Acme Corporation and your global send rule is defined as "fax first otherwise email". The company data for Acme in your accounting system contains an email address but no fax number. When this job is sent through PDFBlaster, it will choose email as the method of delivery because there is no fax number present. Had there been a fax number, then the delivery method would have been internet fax.

The Send Settings section contains options that control how and when your print jobs are sent. If you select "send automatically" then print jobs are sent as they are received in the outbox. You can send jobs individually by highlight the job in the outbox and clicking the Send button. Lastly, you can configure PDFBlaster to send all print jobs in the outbox at a specific time each day. For details on the other options contained on the Settings tab please visit our online help center at www.pdfblaster.com/support.

PDFBlaster User Preferences
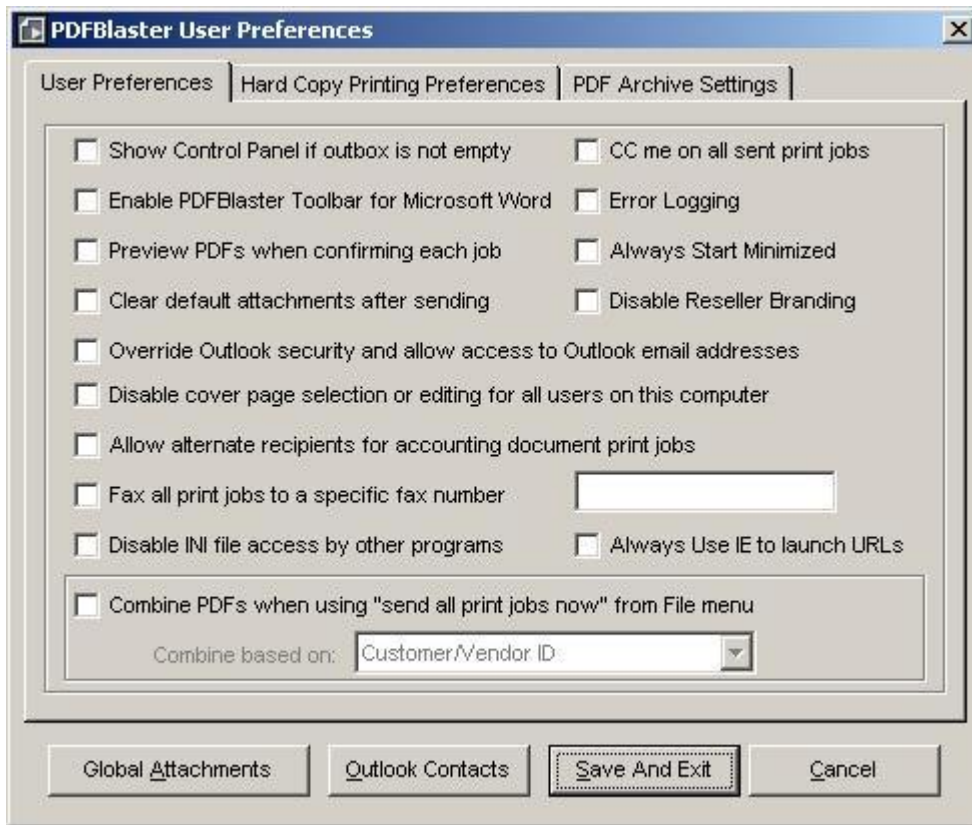
You can access the User Preferences screen by selecting Edit -> Preferences from the PDFBlaster main menu. Most of these options are self-explanatory but the most common preferences are:

Show Control Panel if outbox is not empty – selecting this option will cause the PDFBlaster control panel to pop up as the topmost window reminding you that there are unsent print jobs. Preview PDFs when confirming each job – selecting this option will display a PDF preview using Adobe Acrobat (which must be installed on your computer) when you attempt to send each job. This setting has no effect for auto-send or send at a specific time send modes.

NOTE: Important Note Regarding User Preferences

If you not using the full version of PDFBlaster, certain user preference settings will be disabled. For more information about upgrading to the full version of PDFBlaster, click the Purchase/Upgrade tab.

Enable PDFBlaster Toolbar for Microsoft Word – enabling this feature will place a toolbar in MS Word so you can use your accounting system database as an address book for form letters and mail merges. This is much easier and faster than using the standard MS Word mail merge wizard.
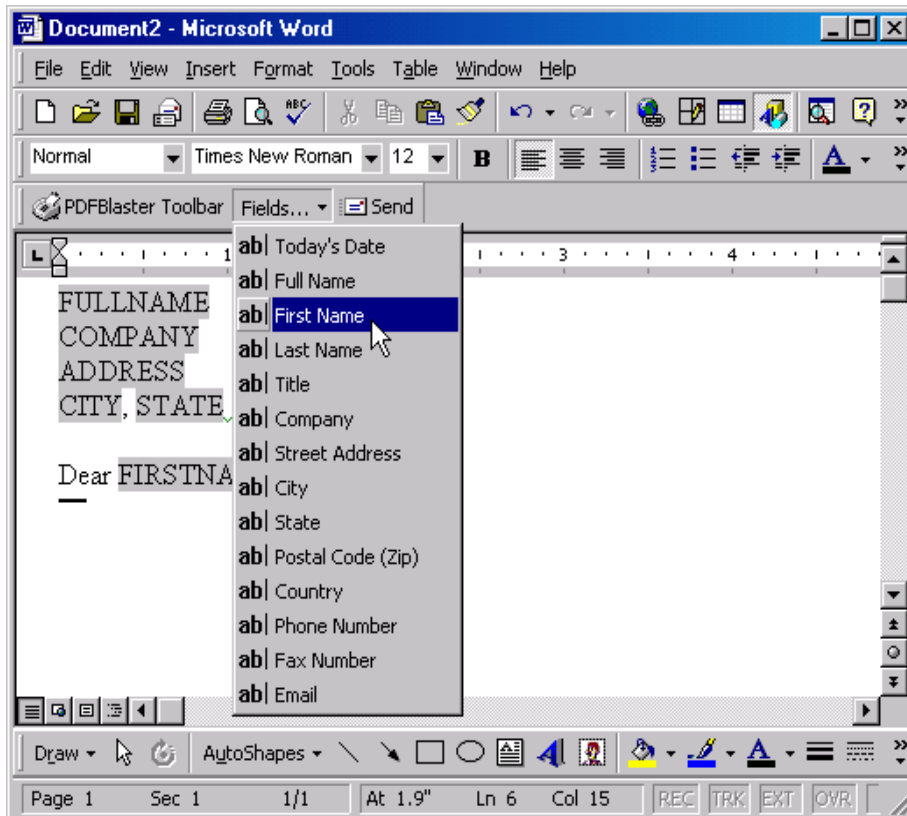
Preview PDFs When Confirming Each Job – this option is checked by default. When you send a document from your outbox, if you have Adobe Acrobat installed, PDFBlaster will automatically generate a PDF rendering of the selected print job. After you use PDFBlaster for a while and get comfortable with it, feel free to turn off this setting. You can always preview a PDF by right-clicking the print job in the outbox and selecting "Preview PDF".

Clear Default Attachments After Sending – if you routinely add default attachments to your outgoing send jobs (such as a disclaimer document or an Excel spreadsheet, checking this option will clear out attachments in between jobs so you can reselect different attachments for each send job.

Override Outlook Security – For non-accounting documents, you can use your MS Outlook Contacts as an address book from within PDFBlaster. For faxing you do not need to worry about this setting, but for emailing, Outlook restricts unattended access to your email addresses unless you allow an override. Checking this option will cause PDFBlaster to attempt to read your Outlook email addresses, and you will have to select "allow access" from the Outlook security pop-up dialog that will be displayed when PDFBlaster makes this attempt each time.

Disable Cover page selection – if you are an administrator on your computer, and your computer is also used by other non-administrators, you can check this option to restrict the non-administrator users from changing the cover page used by PDFBlaster.

Allow Alternate Recipients for Accounting Jobs – By default PDFBlaster will retrieve the recipient information from your accounting system associated with a particular invoice or purchase order etc. If you occasionally want to send accounting documents to other recipients, say from your Outlook contacts address book, check this option. Then when you try to send an accounting document, PDFBlaster will still pre-populate the recipient information with the correct customer or vendor. At this point, click "Cancel" instead of sending. Then PDFBlaster will display your alternate address book screen so you can choose who you want to send the document to, other than the original customer or vendor.

Fax all print jobs to a specific number – Check this option if you want ALL your fax jobs to go to a single fax number, regardless of what fax number is retrieved from your accounting system. This option is useful for satellite offices you may want to fax all entered orders or invoices back to the home office.

Disable INI file Access From Other Programs – Other programs may be written to link to PDFBlaster and control the PDFBlaster functionality through manipulation of the settings file (typically pdfblaster.ini). If you want to restrict this access by other programs, simply check this option.

Always Use IE to Launch URLs – PDFBlaster communicates with external web sites, such as the online help system, and the ACTIONdocs dashboard. If you experience problems accessing these sites and your default browser is not Internet Explorer, click this option to force PDFBlaster to use IE when accessing these web sites.

CC me on all print jobs – selecting this option will cause PDFBlaster to send a CC PDF email with attachment of every job you send, regardless of whether the job is a fax, email or print job. CC's are sent to the PDFBlaster From Email address.

Error Logging – only check this option when instructed to do so by PDFBlaster Technical support. This option will generate debug text files that will be used by support when assisting with any problems with the software. Leaving this option checked in a non-support situation can lead to slowdown in performance so please only check this option when instructed to do so by PDFBlaster Technical Support.

Always start minimized – selecting this option will cause PDFBlaster to start in your system tray and out of the way until you double-click on it. Print jobs are still queued and/or processed if PDFBlaster is running in minimized mode.

Disable Reseller Branding – By default there is a small banner located in the lower left hand corner of your PDFBlaster Control Panel. To hide this banner simply check this option.

Hard copy printing preferences. If you have a hard-copy printer defined as your default printer, you can configure PDFBlaster to print every print job regardless of the send rule. This option requires the Adobe Acrobat Reader to be installed on your computer.

Global Attachments – when selecting this option, the files you select as global attachments are appended to every print job you send, regardless of whether it is a fax, email or print job.

PDFBlaster Archive Settings

If you are using the full version of PDFBlaster, you can optionally configure PDFBlaster to save archived copies of your sent accounting documents. All you need to do is select a local or network path to store your PDFs. By default your documents will be stored by CMS Company ID, then document type (i.e. INVOICES):
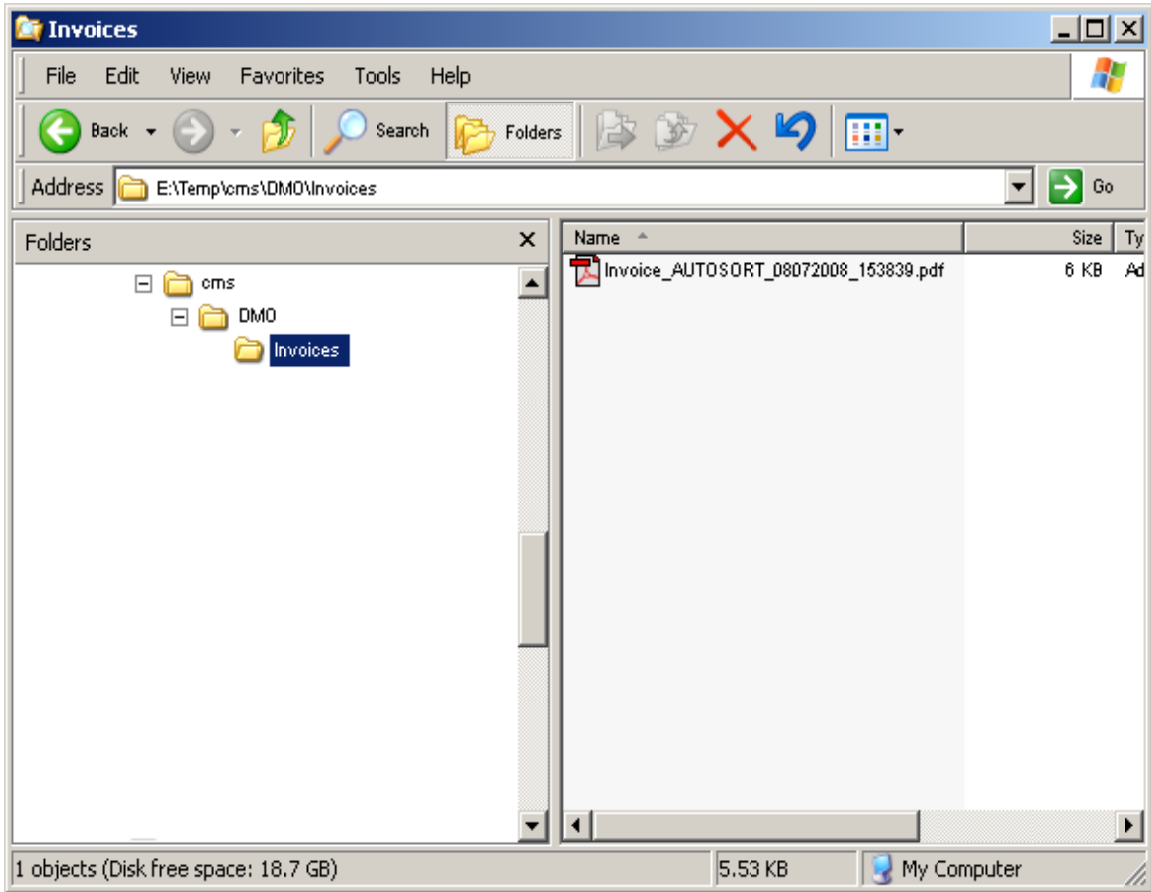
You can change this to behavior by clicking the "Group Archived PDFs by Customer or Vendor ID", which will then cause PDFBlaster to store your documents by CMS Company ID, then Customer or Vendor ID: