



PDFBlaster
QuickStart Guide

For Microsoft Great Plains

Revised: Thursday, February 16, 2006

Installing PDFBlaster



Make sure you have already downloaded the latest version of PDFBlaster (<http://www.pdfblaster.com/download>) and your activation code available.

Double-click the pdfblaster.exe program to start the 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.

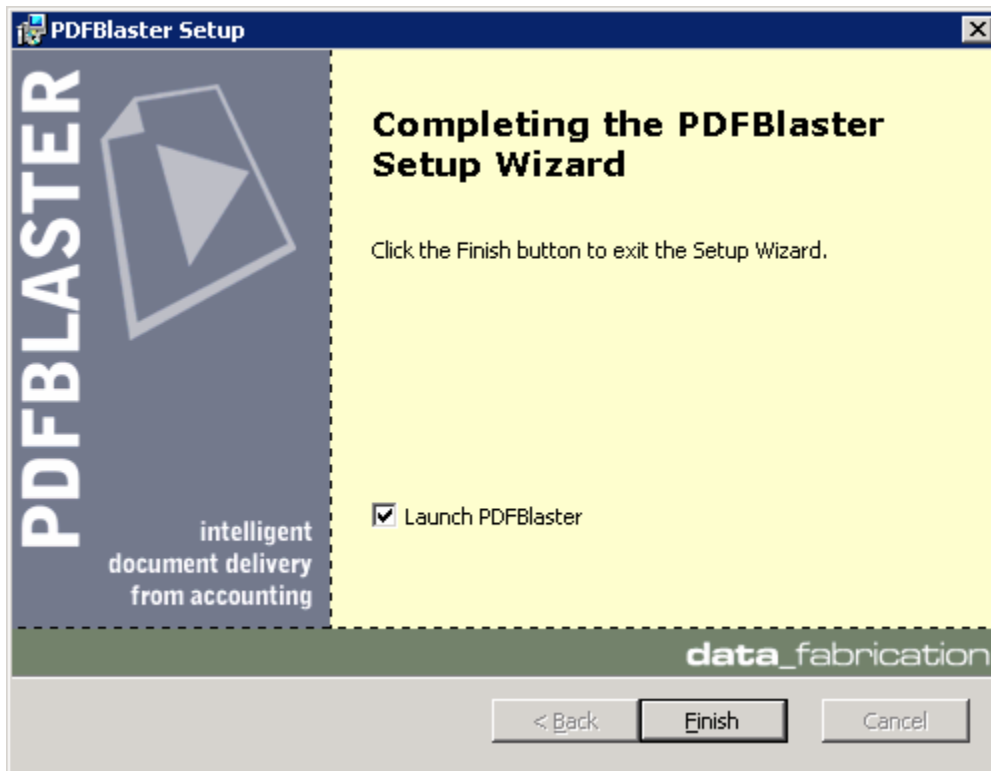
Then, Click Next to continue.

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

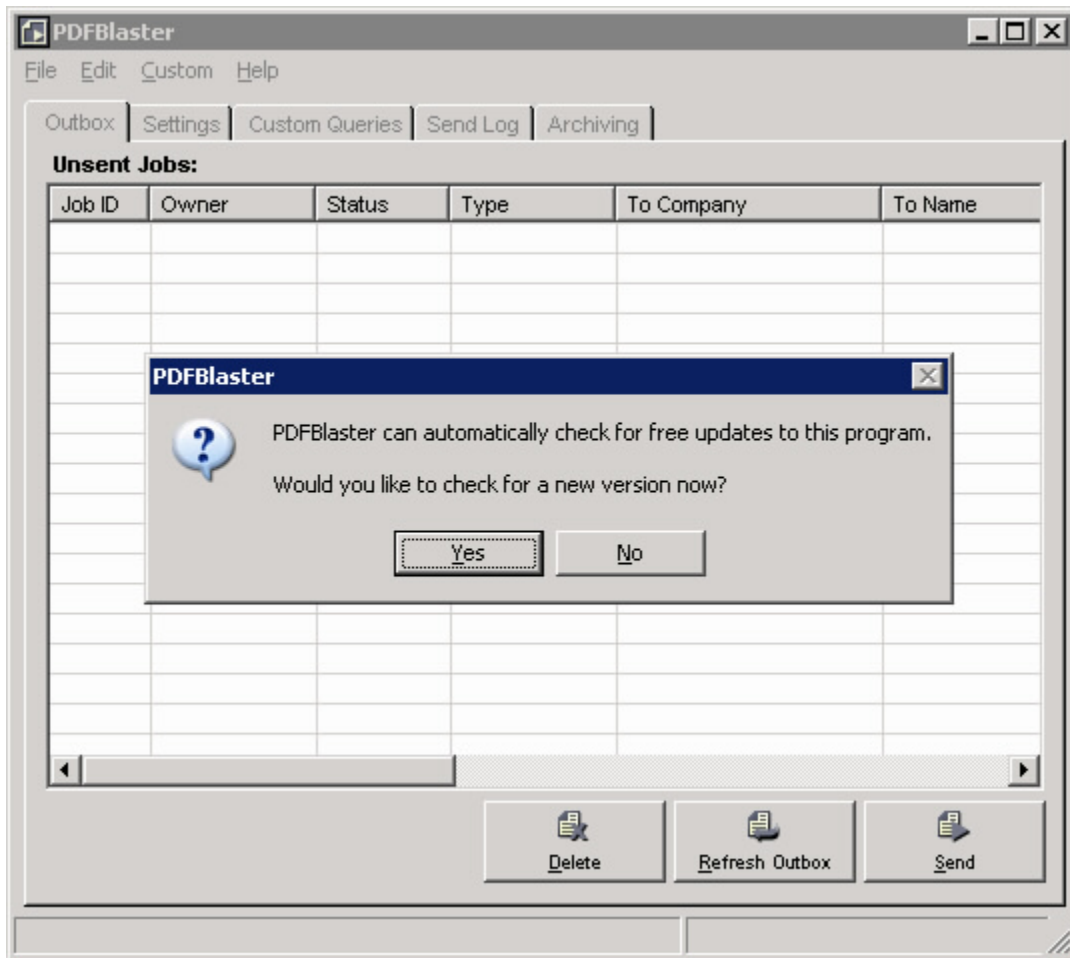


Once the PDFBlaster setup wizard has completed you may be prompted to reboot your computer in some cases. If this happens be sure to reboot your computer immediately to ensure that the PDFBlaster installation completes successfully.

If you don't need to reboot, you'll have the option to launch PDFBlaster by checking the appropriate check box.

Click Finish to complete the installation.

Starting PDFBlaster For the First Time

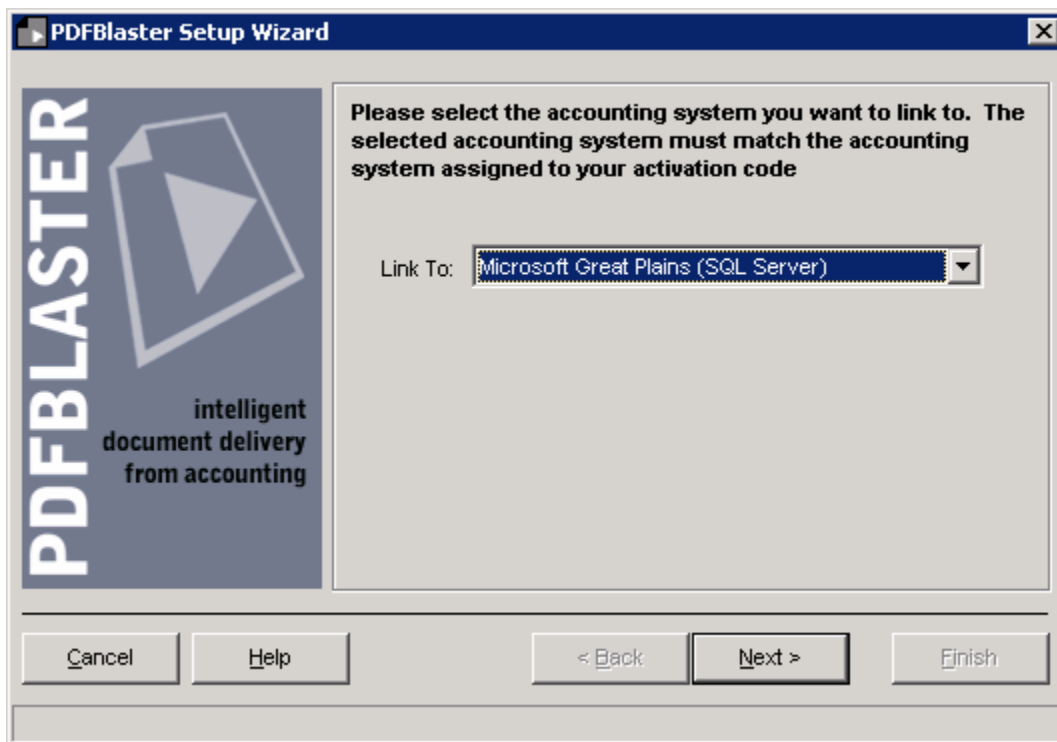


The PDFBlaster Control Panel can be started from your Windows Start menu. Look for Start -> Program Files -> PDFBlaster -> PDFBlaster Control Panel and click on this link when you find it.

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 be asked to complete a quick 5 step setup wizard that will help you link PDFBlaster to your accounting system, configure your email server settings (for sending PDF emails) and activate your software.

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

Choose Microsoft Great Plains (SQL Server)

Click the Next button

Linking To Your Great Plains Database

PDFBLASTER
intelligent document delivery from accounting

Please enter your accounting database login settings. Note that depending on your database, values entered here may require case sensitive entries.

Server Name or IP: server2

Default Database: TWO

Company ID: TWO

User Name:

Password:

Use Integrated Windows Security

Cancel Help < Back Next > Finish

Enter the Server name or IP address of the server that runs the instance of SQL Server that contains your Great Plains database.

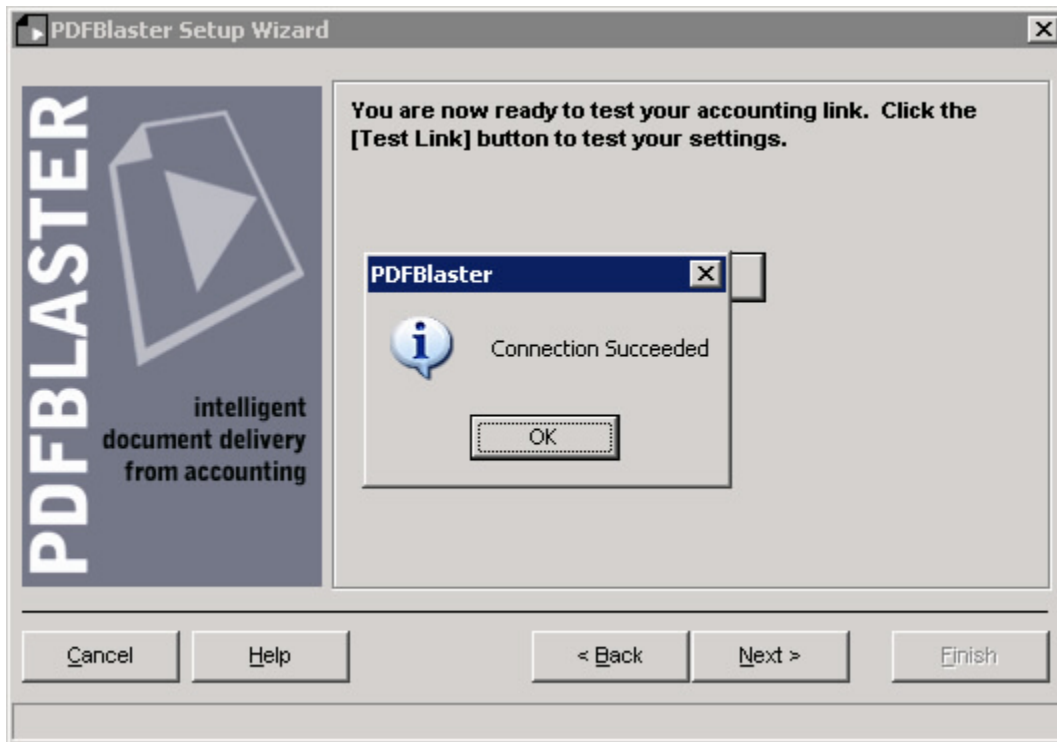
Next, type in (or select) the name of the SQL Server database that contains your Great Plains database. Make sure you select the actual company database, not the Great Plains System database.

Enter a valid SQL server user name and password that has been set up to access the SQL Server database. If you are using Integrated Windows Security, your windows login will be used as the login ID to access the database, so simply check this option.

If you do not know what the correct values are for this screen, please consult your network administrator or database administrator.

Click the Next button 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

PDFBLASTER
intelligent
document delivery
from accounting

Please enter your personal contact information. This information will be used when sending PDF email attachments or on your fax cover sheet.

From Company:

From Name:

From Email:

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.

Configuring PDFBlaster To Work With Your SMTP Server

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from accounting

Please enter your outgoing SMTP mail server settings. If this is an evaluation copy you can skip this step for now but you will need to configure your SMTP settings once your software has been purchased.

Outgoing Mail Server:

Outgoing Mail Server Port:

User Authentication Required

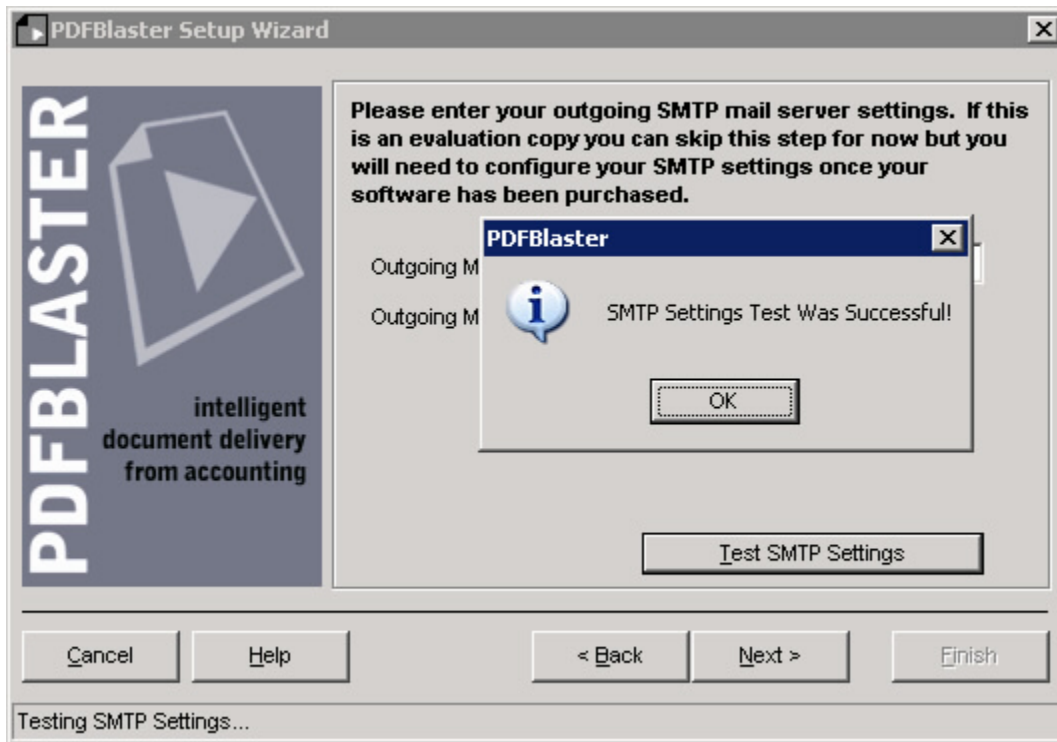
If you plan on sending PDF emails through PDFBlaster, you'll need to enter your outgoing mail server information in this step. If you use Microsoft Outlook as your email client you can look at the email account settings in Outlook to get the information needed here. Otherwise, if you don't know what your outgoing SMTP server settings are you will need to contact.

If your mail server requires authentication, check the appropriate box and enter your mail server login and password. You'll also need to know the "Authentication method", but in most cases, this is simply NONE. Some high-security mail servers use other methods but if you're not exactly sure what to use, try the NONE setting.

NOTE: Important note about your entered email address and your outgoing SMTP server:

Many outgoing mail servers are increasingly being "locked down" to prevent usage by unauthorized email spammers. If you have trouble connecting to your outgoing mail server from PDFBlaster, make sure that the email address you entered is already set up in your mail server configuration. For example, you may have entered sales@abcdistributing.com as your from email address, but there is no sales@abcdistributing.com email alias set up on your mail server. If this is the case, either have your mail administrator add this email address, or else use your personal company email address as your from email address in PDFBlaster.

Testing Your SMTP Mail Server Settings

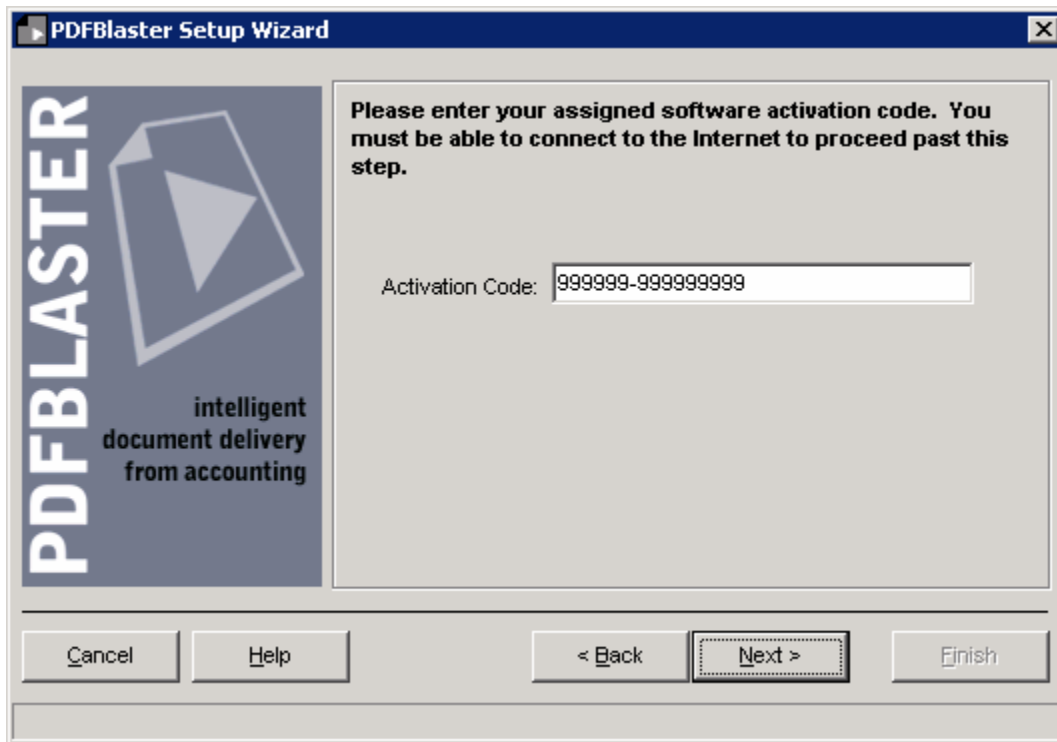


After you enter your outgoing SMTP server settings, click the Test SMTP Settings button to test your configuration. If your settings are correct you will see a response dialog like to one shown above.

If your SMTP test fails it is most likely because one or more of your outgoing SMTP mail server settings was incorrect or that your authentication failed when PDFBlaster tried to contact your mail server. Please check with your ISP or network administrator to obtain the correct outgoing SMTP mail server settings.

If your test was successful, click Next to continue.

Entering Your PDFBlaster Activation Code



Please enter the activation code provided to you via email 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 your software activation attempt fails, it is most likely due to one of the following scenarios:

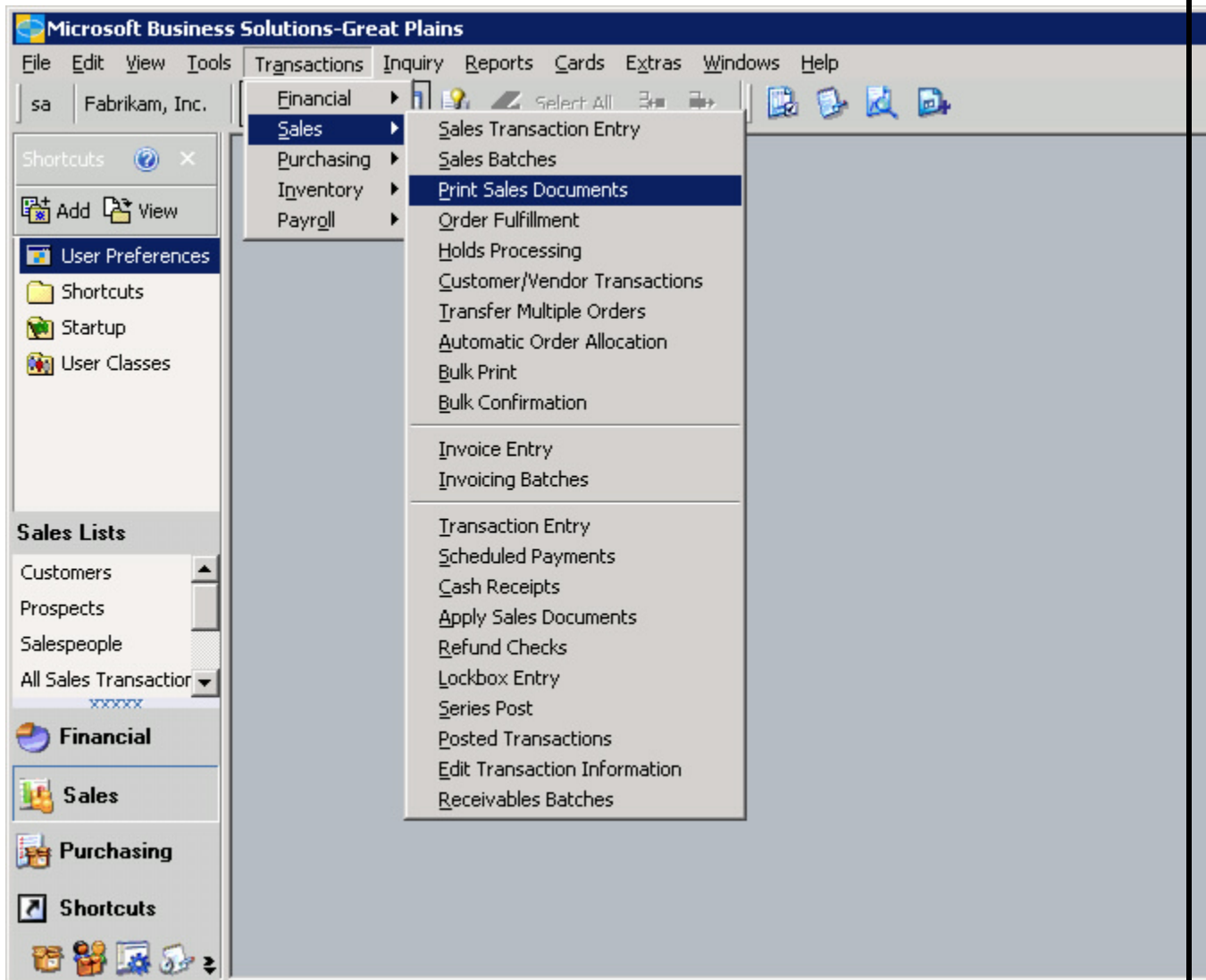
You entered an incorrect activation code

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 using PDFBlaster in trial mode, 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 Great Plains



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 from Great Plains. Open the Transactions -> Sales -> Print Sales Documents menu from the Great Plains main menu.

Printing To PDFBlaster From Great Plains

The screenshot shows the 'Print Sales Documents' dialog box. The 'Document Type' is set to 'Invoice', 'Print' is 'Documents', 'Sort Documents By' is 'Doc Type/Number', and 'Currency to Print' is 'Originating'. The 'Include' section has 'Document' checked, 'Picking Ticket' unchecked, and 'Packing Slip' unchecked. The 'Format' section has three dropdowns, all set to 'Blank Paper'. The 'Documents' panel has 'Reprint Previously Printed' checked and 'Print Customer Item' unchecked. The 'Picking Ticket' panel has 'Reprint Previously Printed' unchecked. The 'Packing Slip' panel has 'Reprint Previously Printed' unchecked. The 'Ranges' section has 'Document Number' selected, 'From' set to 'INVSP1005', and 'To' set to 'INVSP1005'. The 'Restrictions' section shows 'Document Number from INVSP1005 to INVSP1005'. There are 'Insert >>' and 'Remove' buttons.

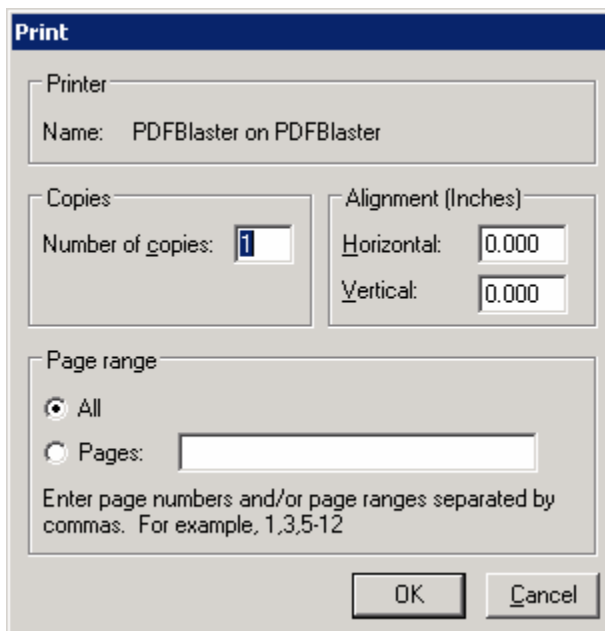
Set the Document type to Invoices. Check the Include Document checkbox. Optionally, you can check the Reprint Previously Printed option.

Next, select the document number range for your invoices. This can be a single invoice (as shown above) or a range of invoices. PDFBlaster can handle batch print jobs just as easily as a single print job.

After you select your document number range, click the Insert button to add the range restriction criteria.

Finally, click Print to continue.

Printing To PDFBlaster



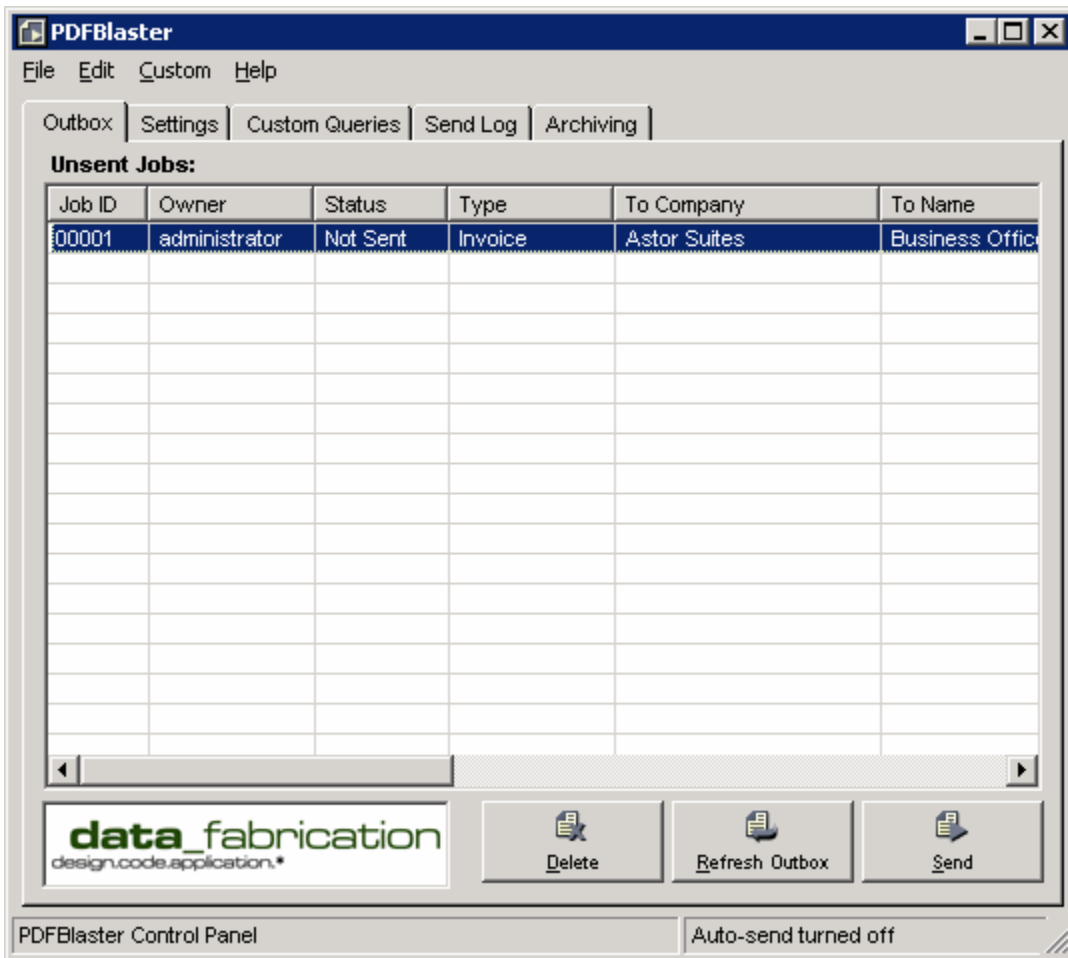
The screenshot shows a 'Print' dialog box with the following fields and options:

- Printer:** Name: PDFBlaster on PDFBlaster
- Copies:** Number of copies: 1
- Alignment (Inches):** Horizontal: 0.000, Vertical: 0.000
- Page range:** All, Pages: [text box]
- Enter page numbers and/or page ranges separated by commas. For example, 1,3,5-12
- Buttons: OK, Cancel

Make sure you select PDFBlaster as your output printer. If it's not your default printer click the Printer Setup button and select PDFBlaster as the printer.

Your accounting system will then start printing your invoices to the PDFBlaster printer

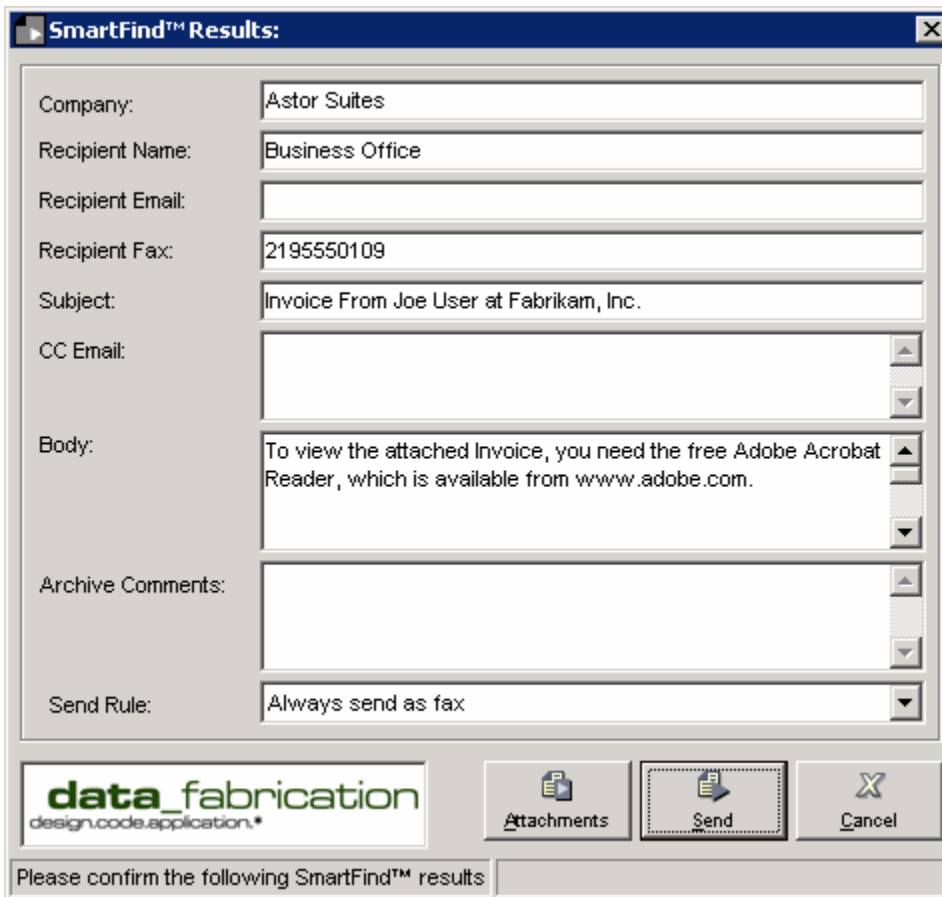
Printing To PDFBlaster



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

Highlight the first job and then click the Send button.

Printing To PDFBlaster



The image shows a screenshot of the 'SmartFind™ Results' dialog box. The dialog has a title bar with a close button. It contains several input fields and a dropdown menu:

- Company: Astor Suites
- Recipient Name: Business Office
- Recipient Email: (empty)
- Recipient Fax: 2195550109
- Subject: Invoice From Joe User at Fabrikam, Inc.
- CC Email: (empty)
- Body: To view the attached Invoice, you need the free Adobe Acrobat Reader, which is available from www.adobe.com.
- Archive Comments: (empty)
- Send Rule: Always send as fax

At the bottom of the dialog, there is a logo for 'data_fabrication design.code.application.*' and three buttons: 'Attachments', 'Send', and 'Cancel'. Below the dialog, there is a text box that says 'Please confirm the following SmartFind™ results'.

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. 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).

Since your global send rule was set to "send as a test to my email address" this is the default send rule for this job.

Since you want to send this invoice via fax, click the Send Rule dropdown and change the rule to "Always send as fax".

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

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.

That's it!

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 PDFBlaster

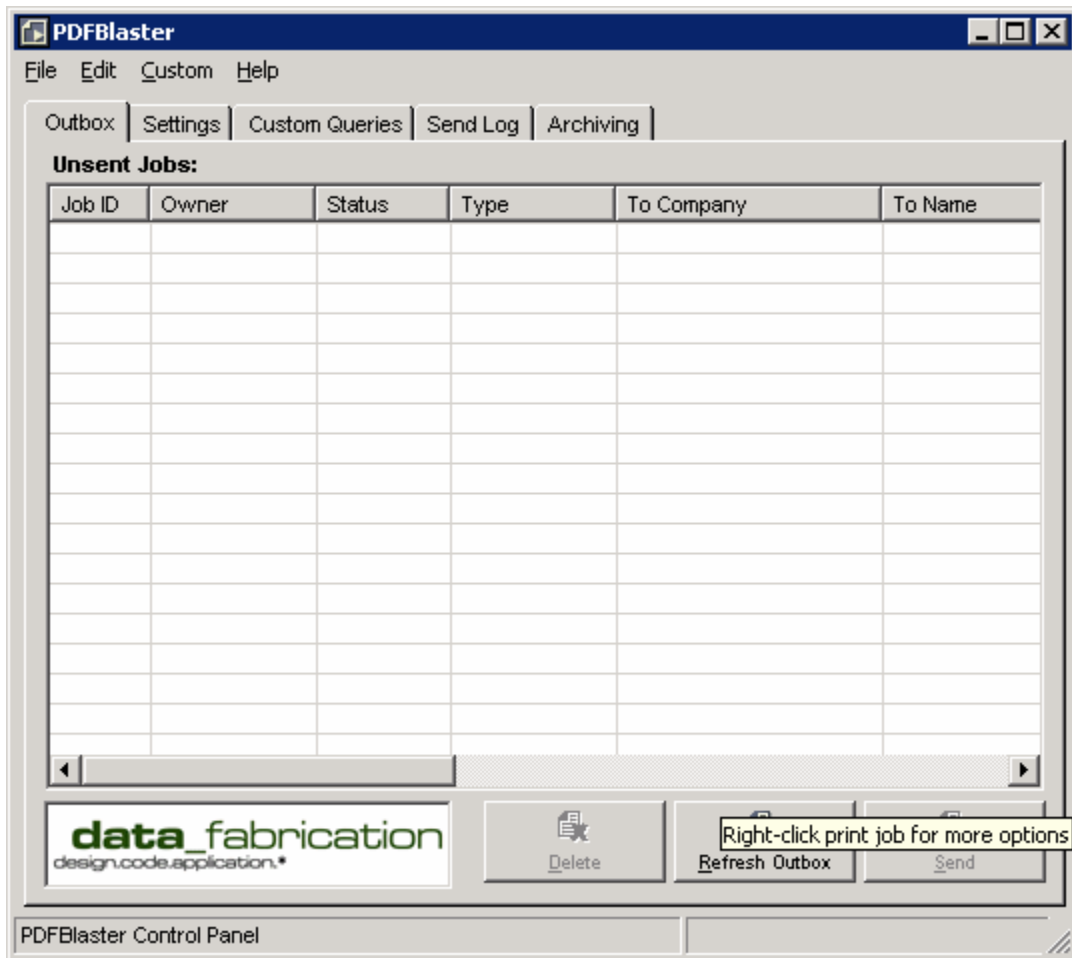
Contact our sales hotline at 312.264.2378
Email us at sales@pdfblaster.com

Extra Information

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

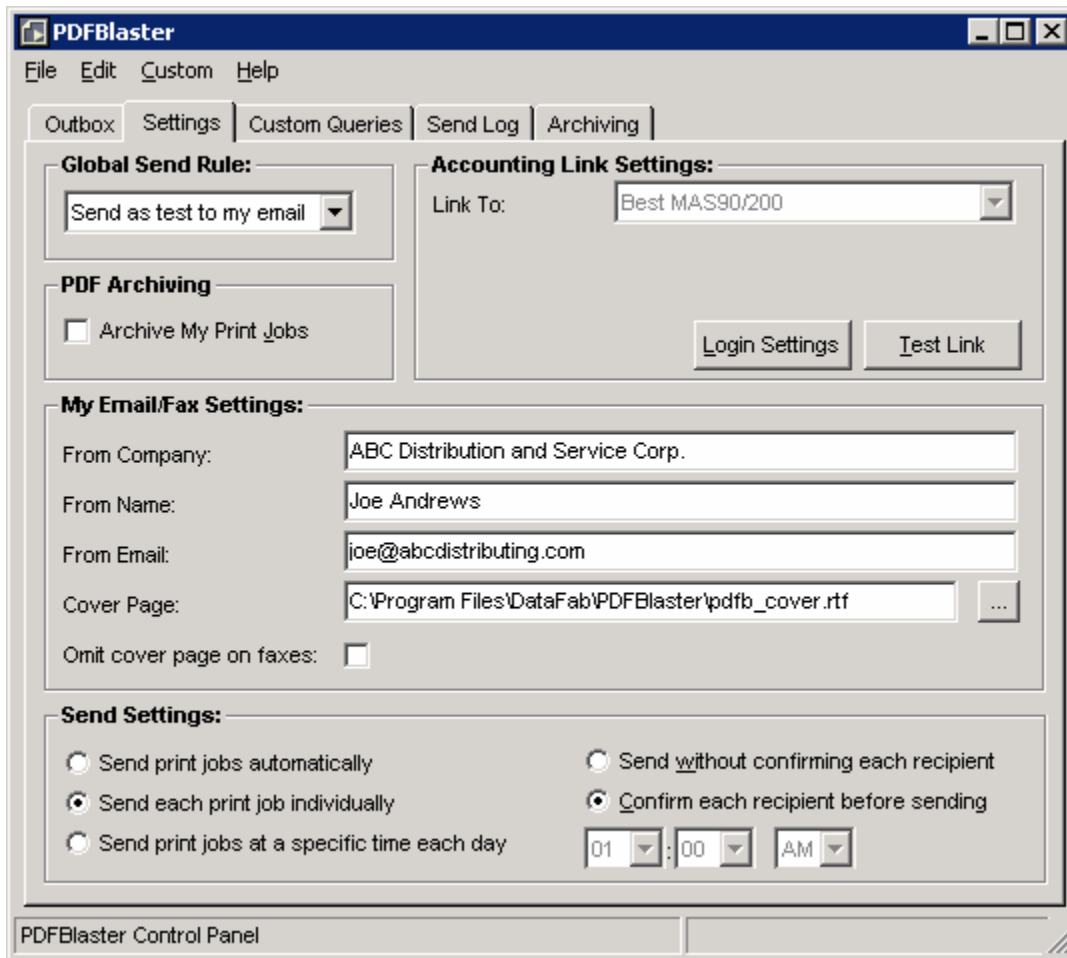
These items are all optional, and you don't need to configure any of these things to start sending your first trial faxes and emails.

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

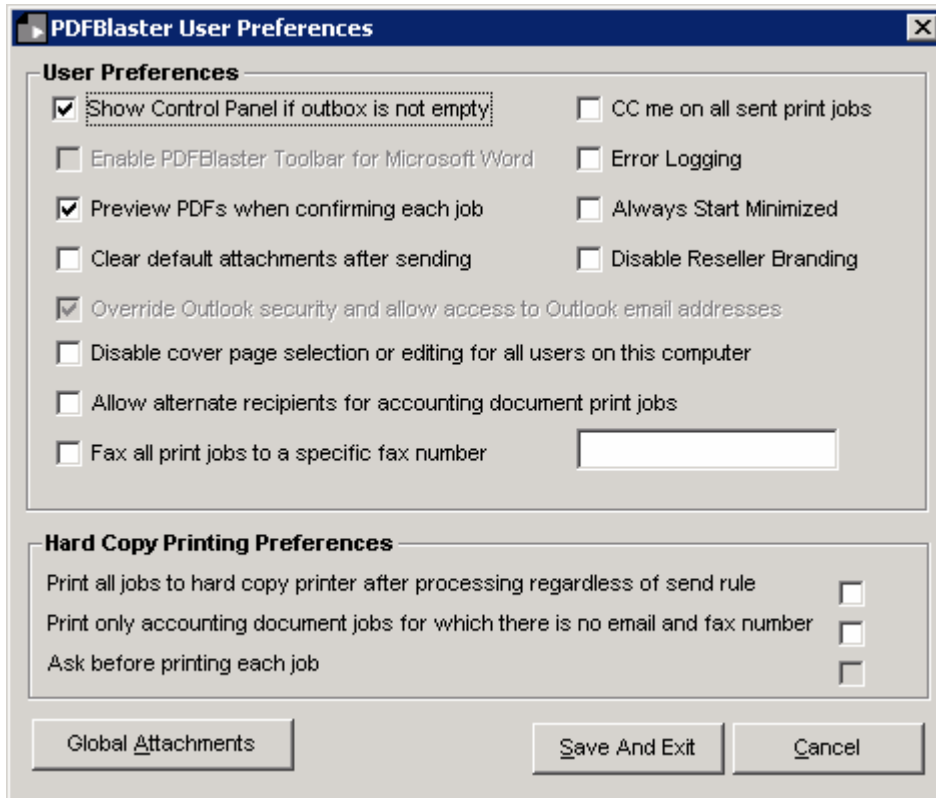


The PDFBlaster Settings tab contains settings that control how you want to process print jobs in your outbox.

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.

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.

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.

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.