



**PDFBlaster**  
QuickStart Guide

**For Microsoft Office Accounting**

Revised: November 6, 2005

## 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

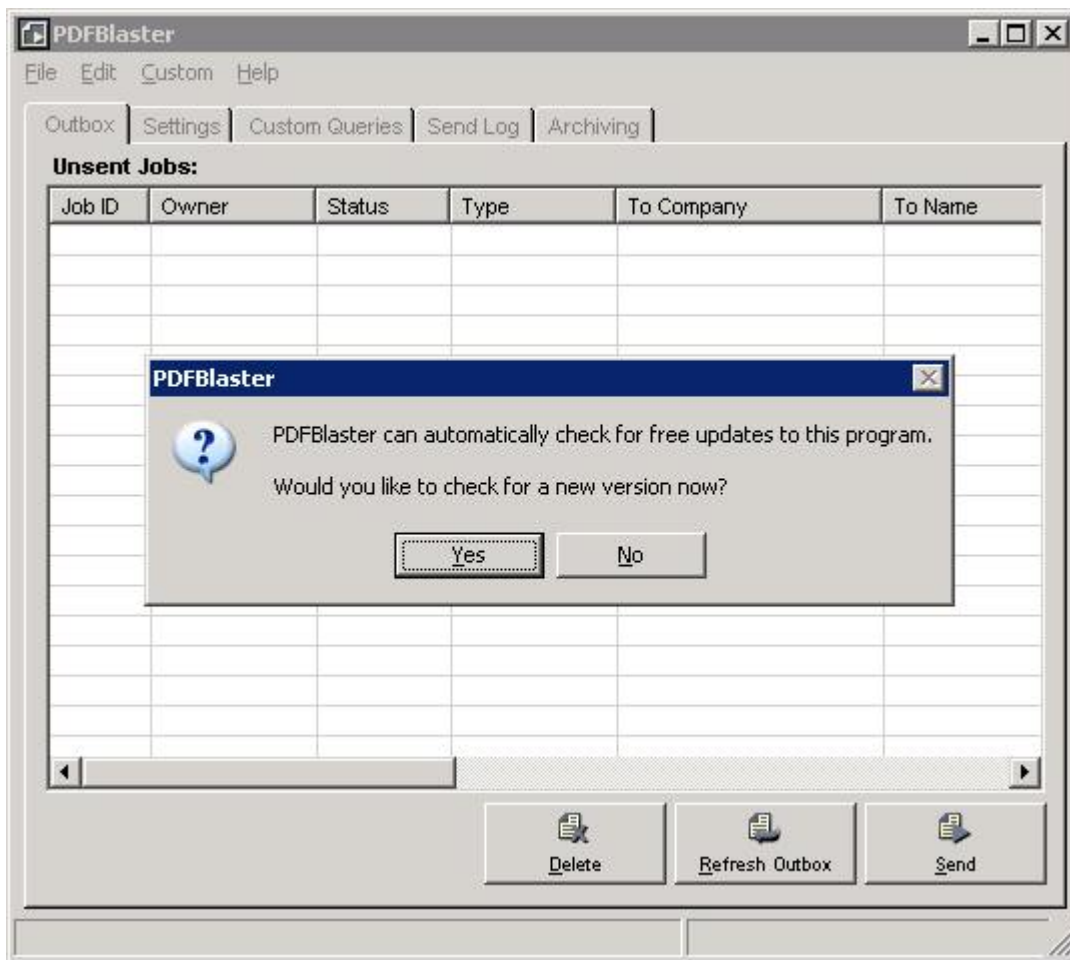


Once the PDFBlaster setup wizard has completed you may be prompted to reboot your computer in some cases. If this happens be sure to reboot your computer immediately to ensure that the PDFBlaster installation completes successfully.

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 Office Accounting

Click the Next button

## Linking To Your Microsoft Office Accounting Database

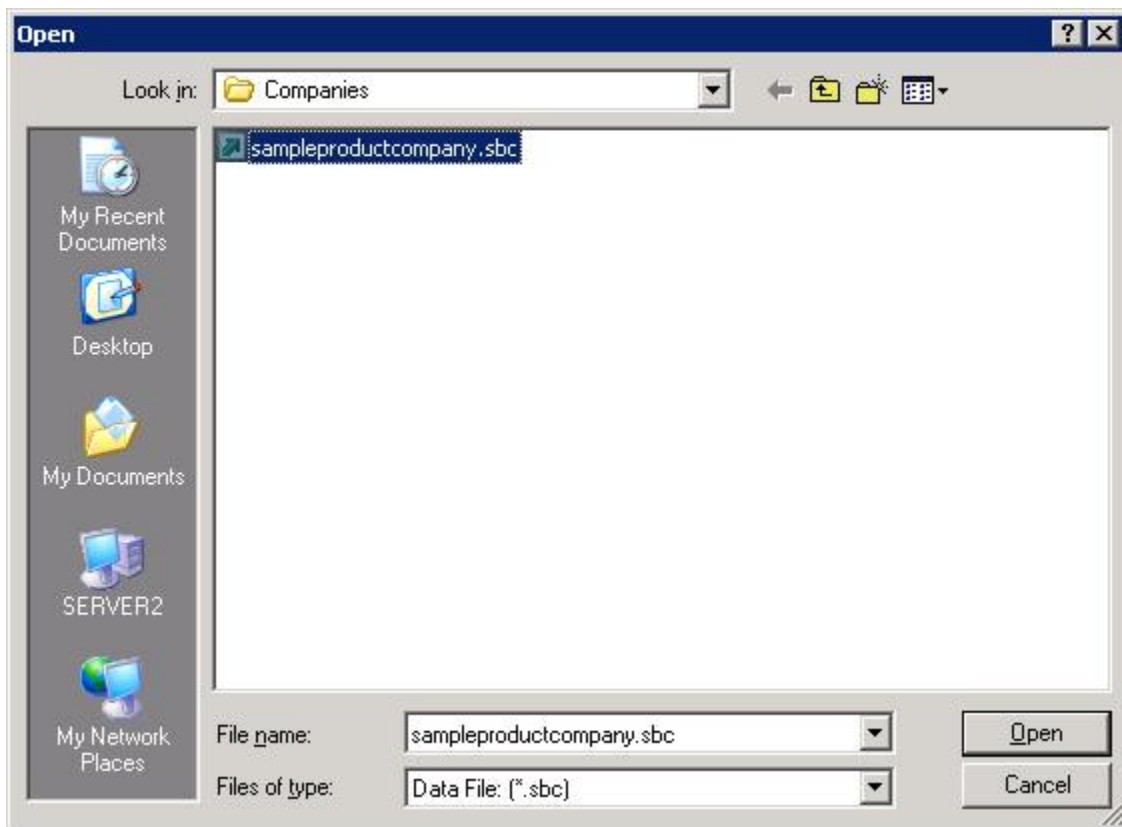


The settings required in this step are similar to those used by your Microsoft Office Accounting system. You will need to select a Microsoft Office Accounting data file, denoted by the .sbc file extension.

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



Select your Office Accounting data file. By default, data files are stored in your My Documents\Office Accounting folder. If you are connecting to a company data file stored on another computer, this file location may be different.

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

Click on the company data file and then click Open to continue.

## Selecting A Office Accounting Data File

PDFBlaster Setup Wizard

**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\MSSMLBIZ

Default Database: sampleproductcompany

Company ID:

User Name:

Password:

Use Integrated Windows Security

Cancel Help < Back Next > Finish

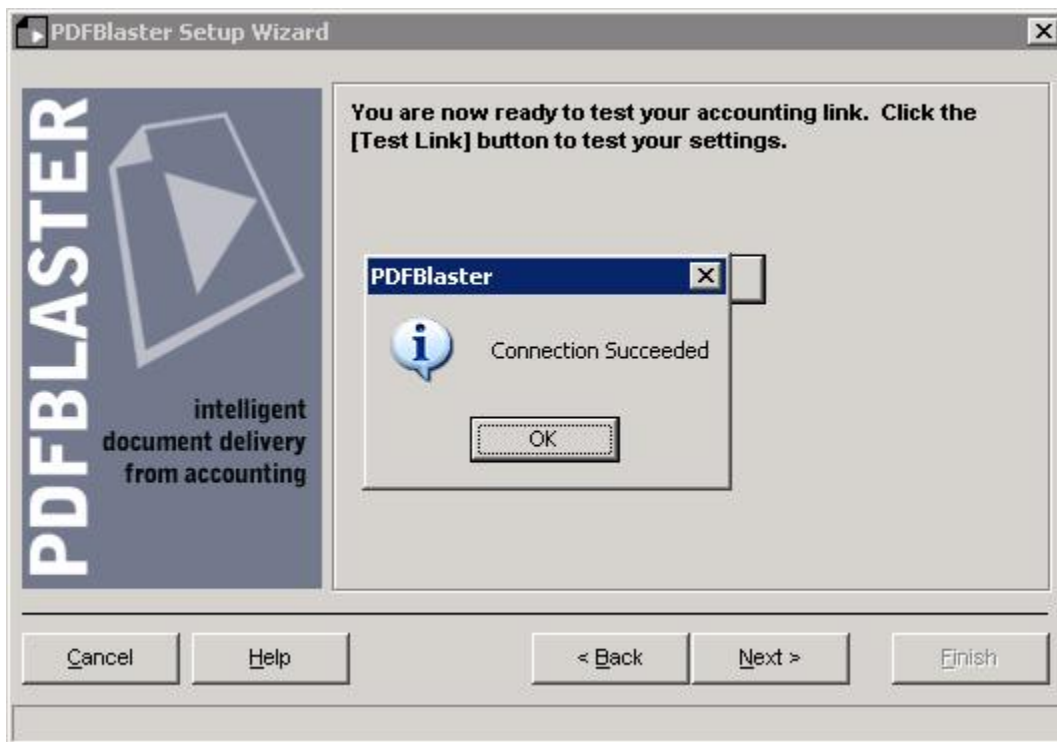
The setup wizard will determine the default settings to connect to this data source and display them in the next step shown above. In most instances, these settings will be correct; however, if you are connecting to a company data file stored on another computer, you may need to override the default options shown.

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

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

**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: Northwind Traders

From Name: Joe User

From Email: joeuser@northwind.com

Cancel Help < Back Next > Finish

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

**PDFBLASTER**  
intelligent  
document delivery  
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.

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*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

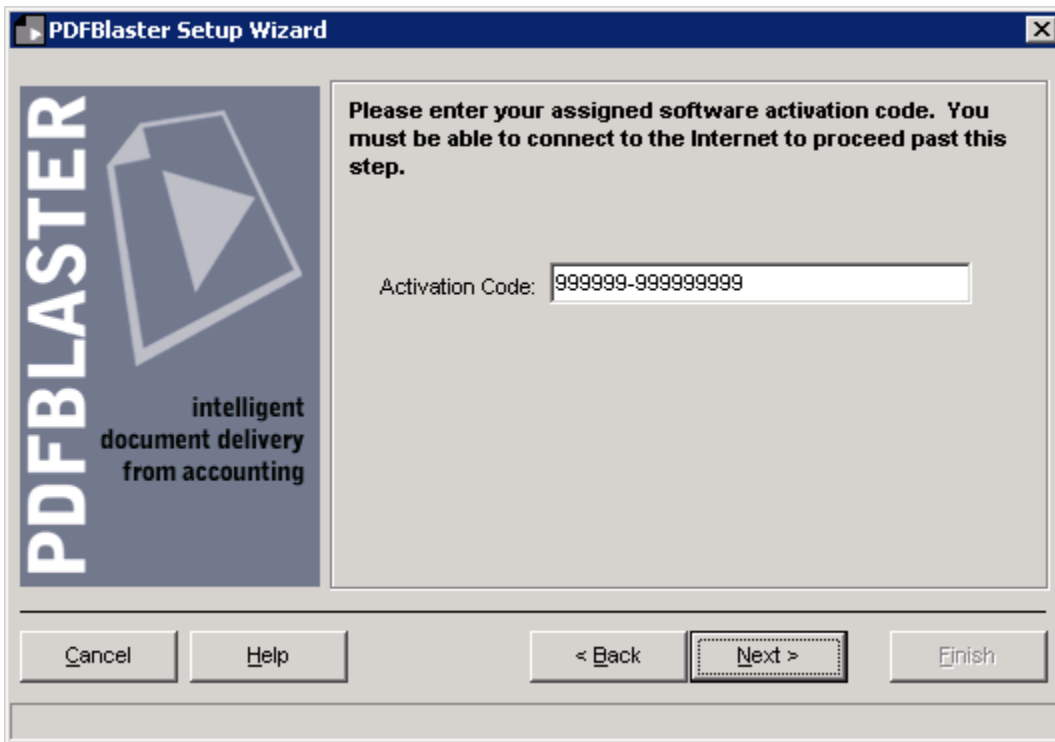


After you enter your outgoing SMTP server settings, click the Test SMTP Settings button to test your configuration. If your settings are correct you will see a response dialog like to one shown above.

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.

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**NOTE:** Important Note about failed activation attempts:

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

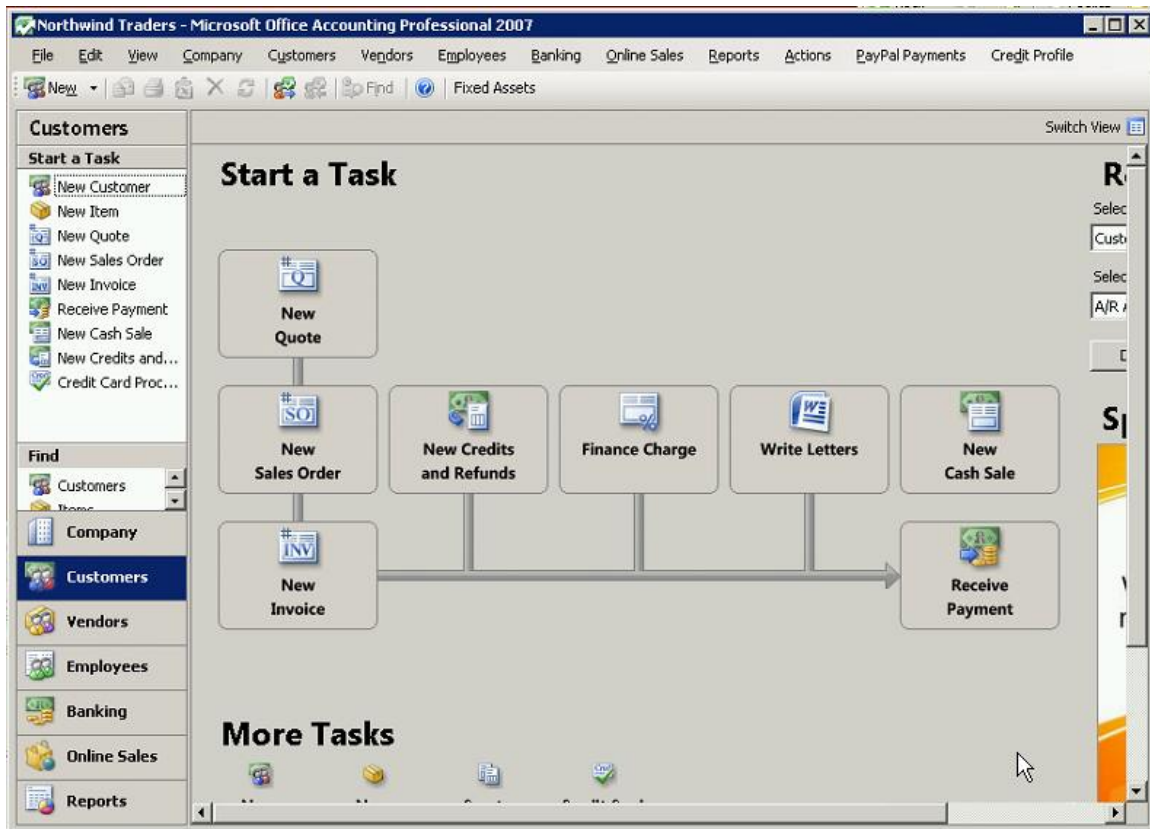
*You entered an incorrect activation code*

*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.*

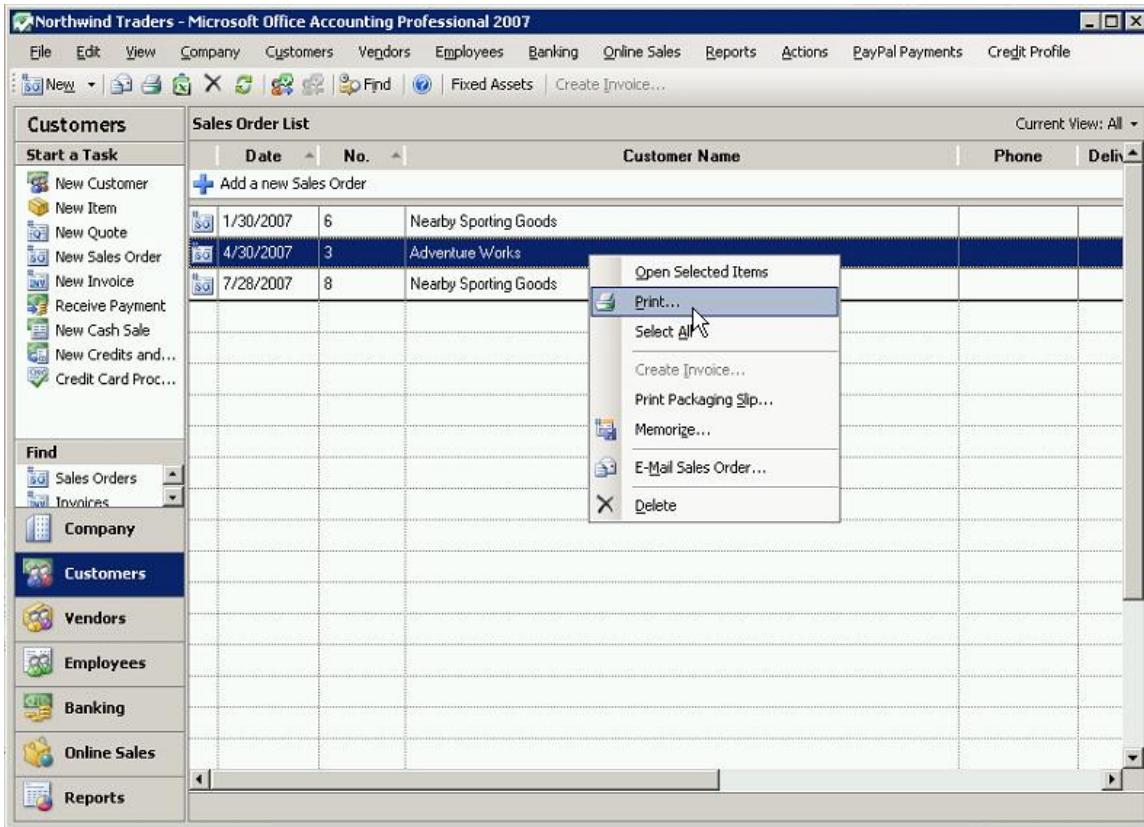
## Printing To PDFBlaster From Microsoft Office Accounting



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.

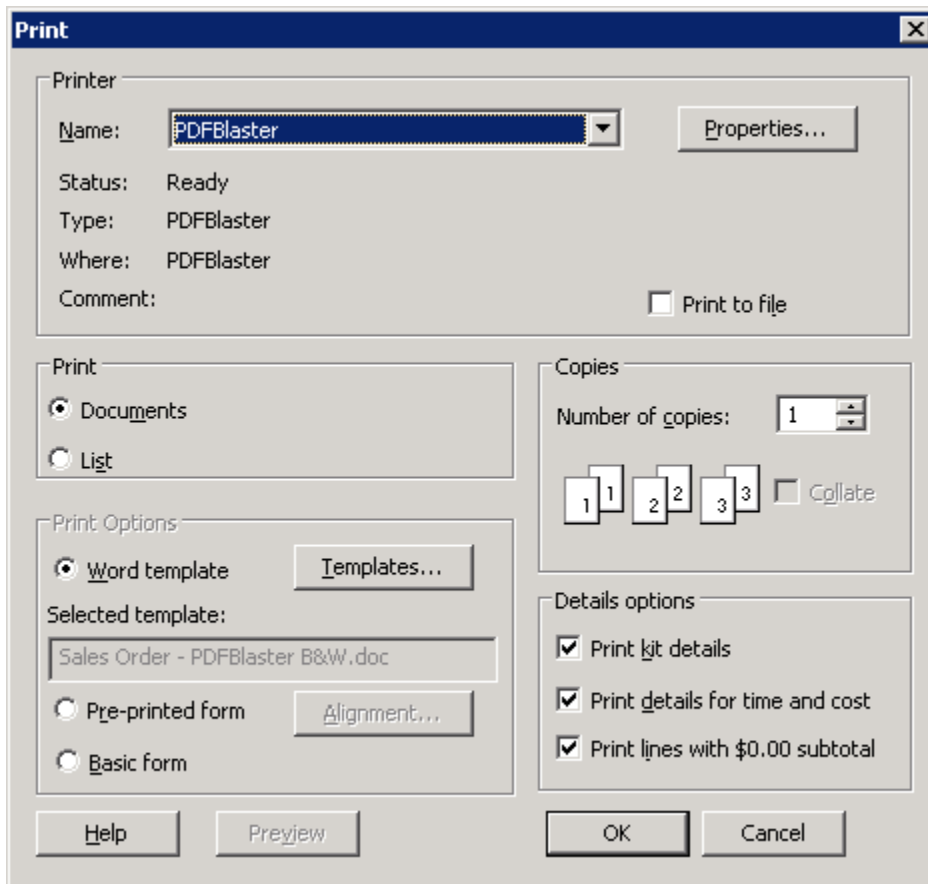
For example, suppose you want to send out your sales orders from Office Accounting. Click the Customers bar on the left and then click the Sales Orders link under the Find section, as shown above.

## Printing To PDFBlaster From Microsoft Office Accounting



A list of available sales orders will be shown. You can select one or more sales orders and then select Print to continue.

## Printing To PDFBlaster From Microsoft Office Accounting



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.

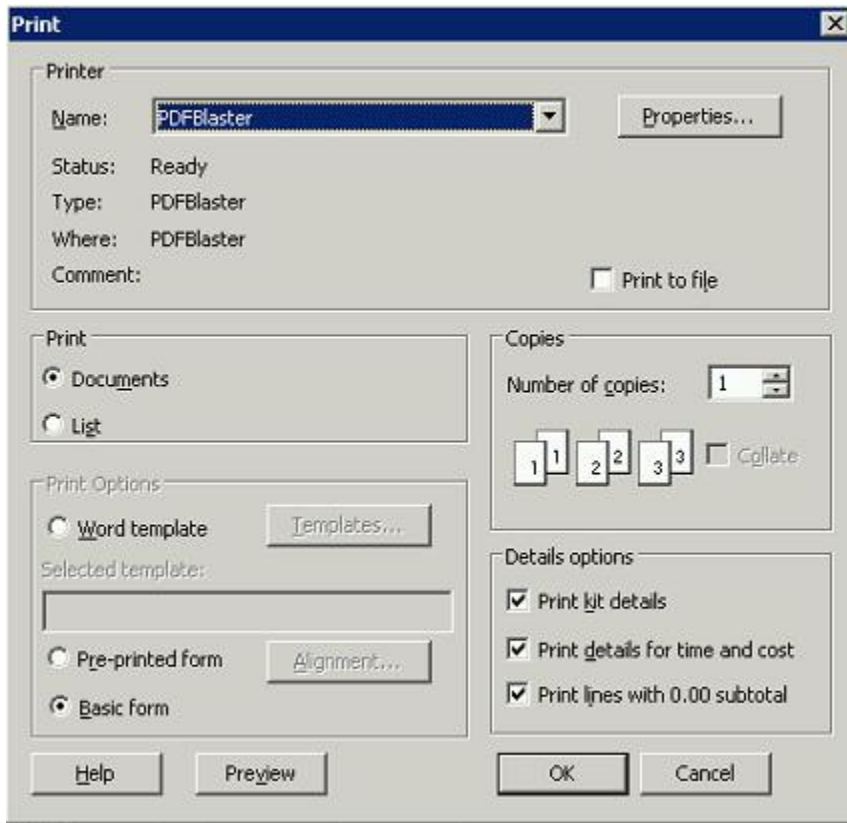
Next, make sure you select Word template under the Print options section. PDFBlaster uses specialized Word templates that enable printed documents to be pre-addressed when sent to PDFBlaster.

Click the Templates... button to continue.

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*NOTE: You can modify the base PDFBlaster Word templates just like the default Word templates that ship with Microsoft Office Accounting. If you make changes to any of the default PDFBlaster Word templates, be sure to save them with a different file name than the original template.*







## Printing To PDFBlaster



The image shows a dialog box titled "SmartFind™ Results:". It contains several input fields and a dropdown menu. The fields are: Recipient Company (Adventure Works), Recipient Name (Garrett Young), Recipient Email (tony@karwatowicz.com), Recipient Fax (empty), From Email (joe@northwind.com), CC Email (empty), Subject (Sales Order From Joe Smith at Northwind Traders), Body (To view the attached Sales Order, you need the free Adobe Acrobat Reader, which is available from www.adobe.com.), Archive Comments (empty), and Send Rule (Always send as fax). At the bottom, there is a button labeled "ACTIONdocs enabled" and three buttons: Attachments, Send, and Cancel. A message at the bottom reads "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 sales order 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.

After your fax is delivered you will receive a confirmation email with the results of the transmission.

That's it!

## Support and Purchasing

### To Obtain Additional Technical Support

Visit our online support site at [www.pdfblaster.com/support](http://www.pdfblaster.com/support)  
Email us at [support@pdfblaster.com](mailto:support@pdfblaster.com)

### To Purchase PDFBlaster

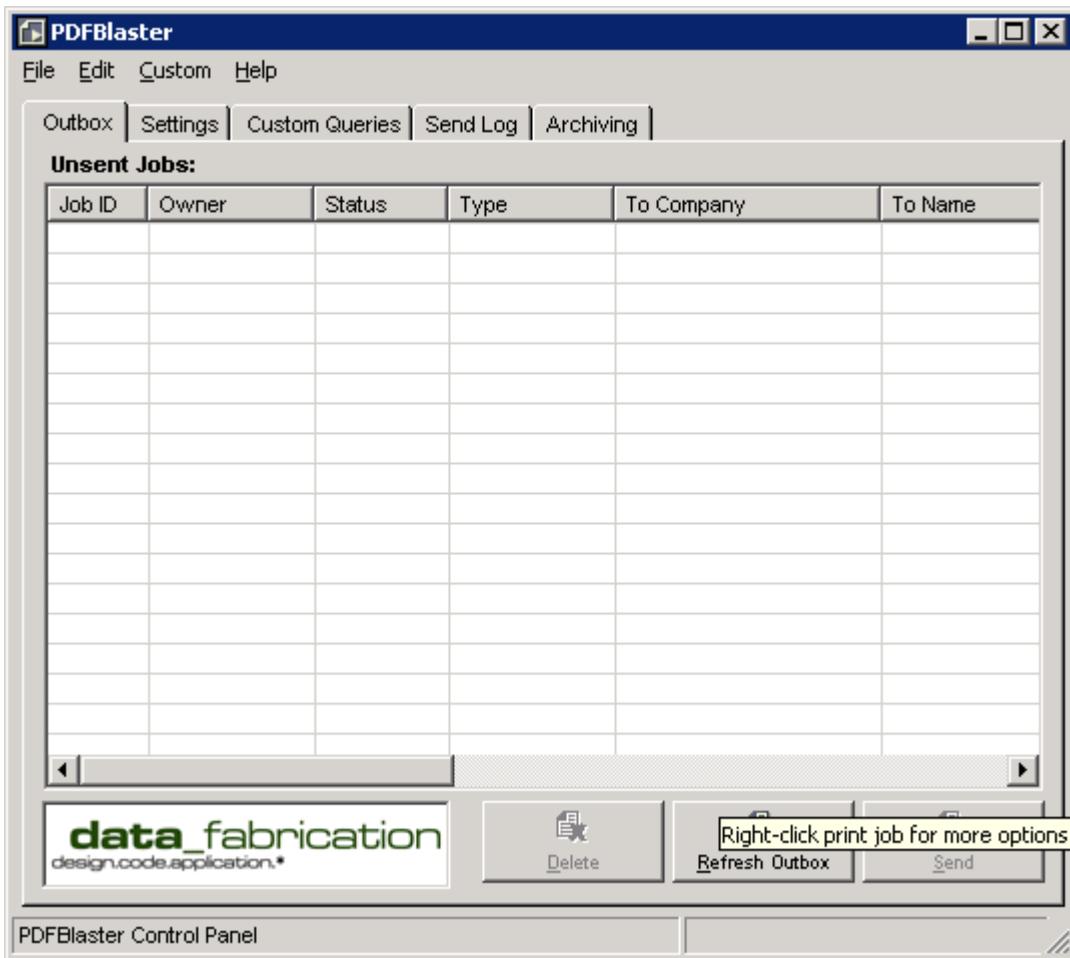
Contact our sales hotline at 312.264.2378  
Email us at [sales@pdfblaster.com](mailto:sales@pdfblaster.com)

## Extra Information

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

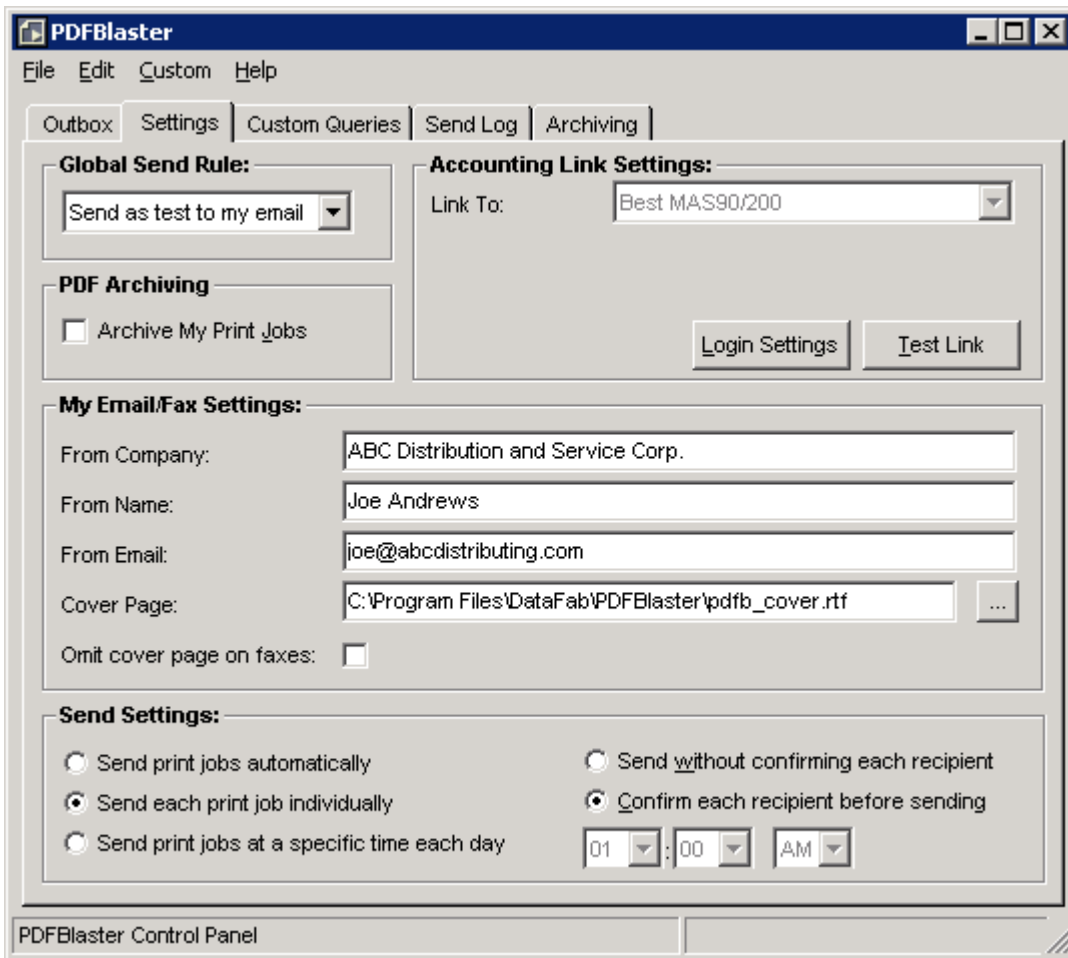
These items are all optional, and you don't need to configure any of these things to start sending your first trial faxes and emails.

## 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

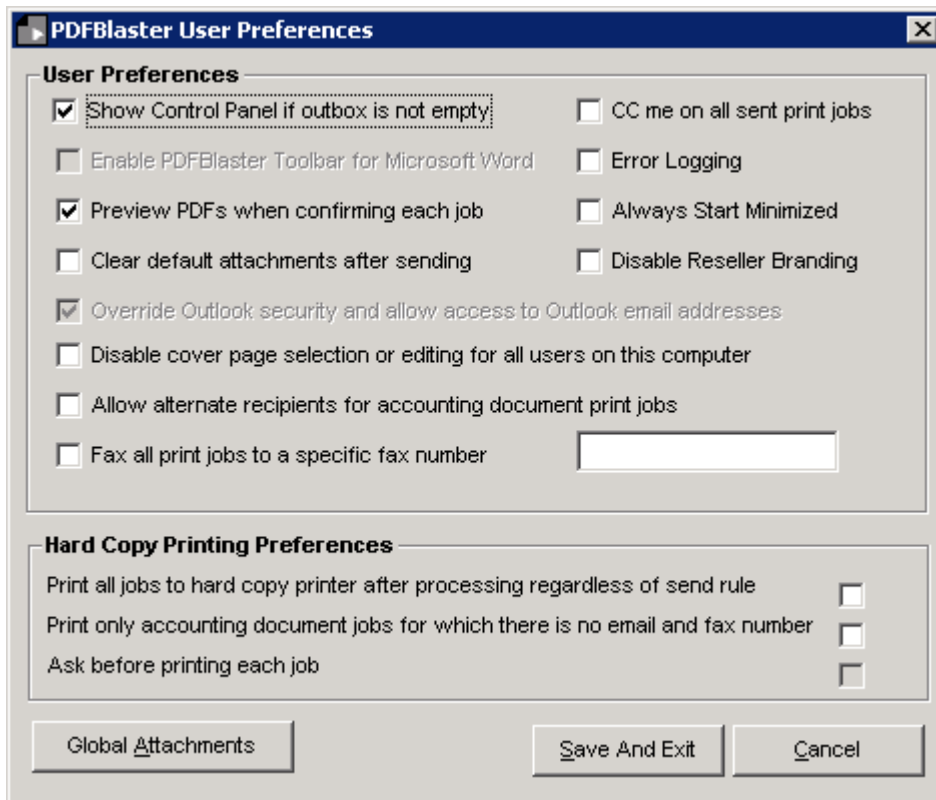


The PDFBlaster Settings tab contains settings that control how you want to process print jobs in your outbox.

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](http://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.