PDFBLASTER

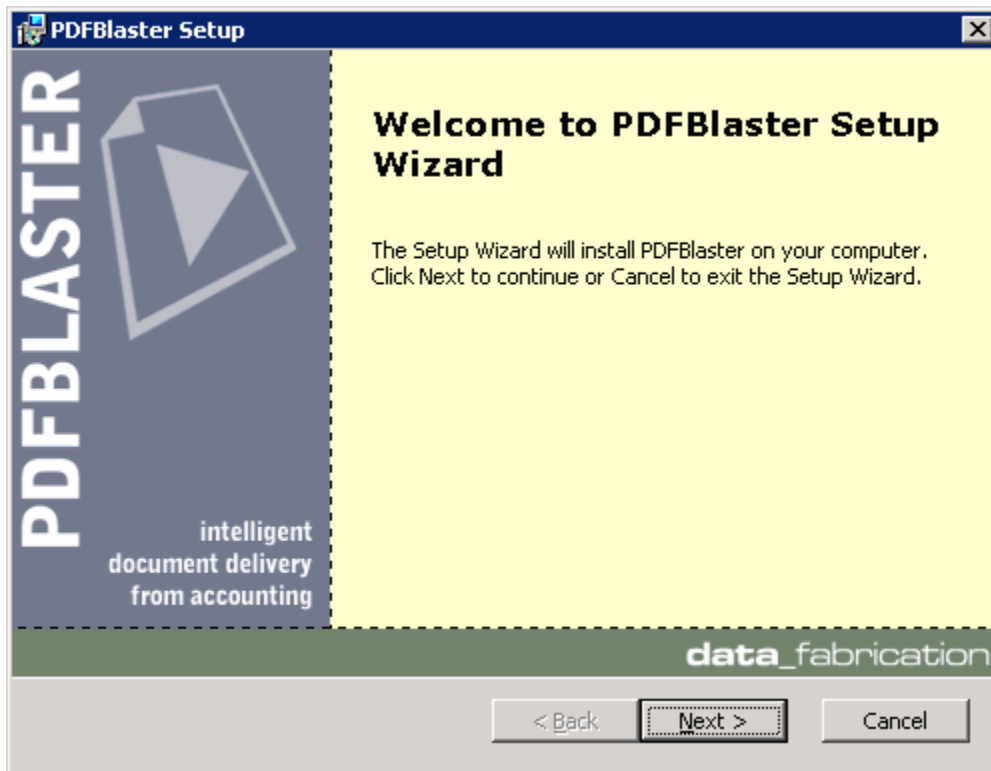**intelligent document delivery from accounting**

PDFBlaster
QuickStart Guide

For Custom Applications and Forms

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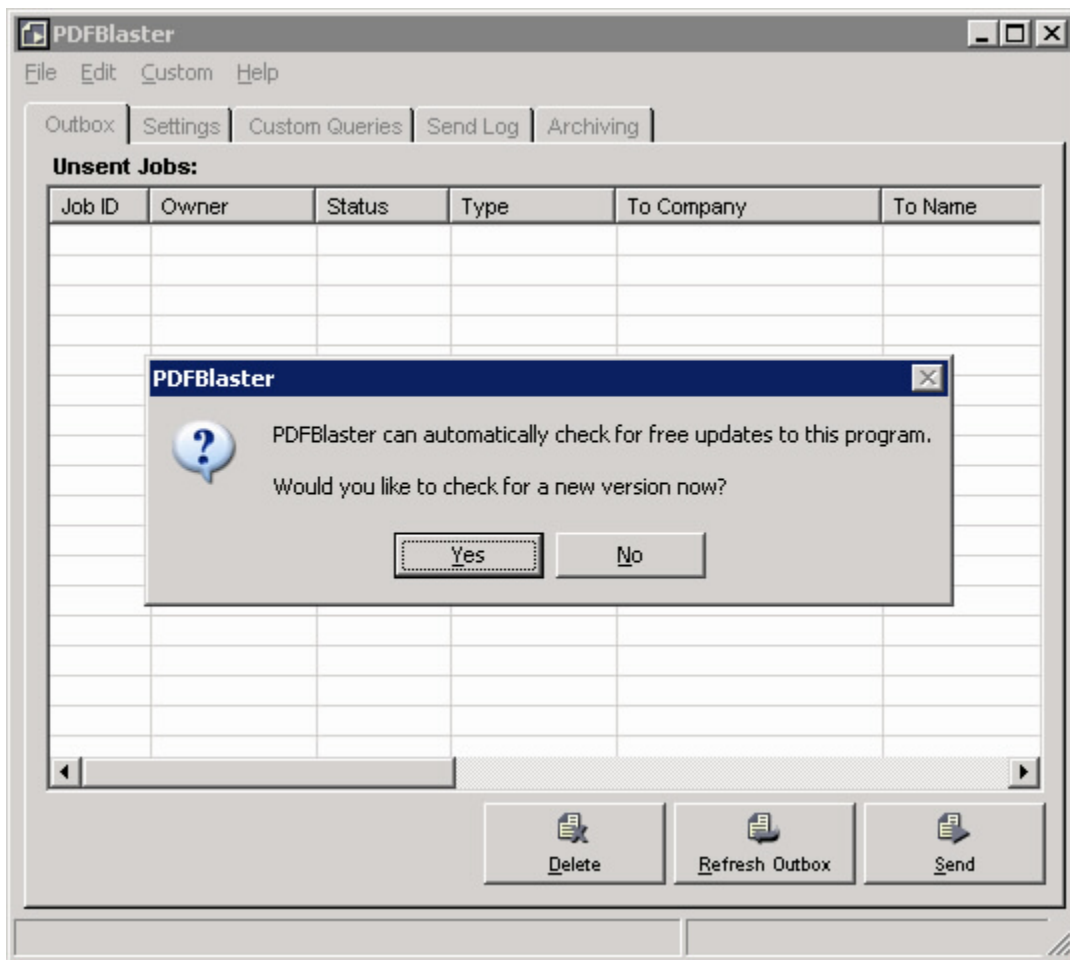
The PDFBlaster Control Panel can be started from your Windows Start menu. Look for Start -> Program Files -> PDFBlaster -> PDFBlaster Control Panel and click on this link when you find it.

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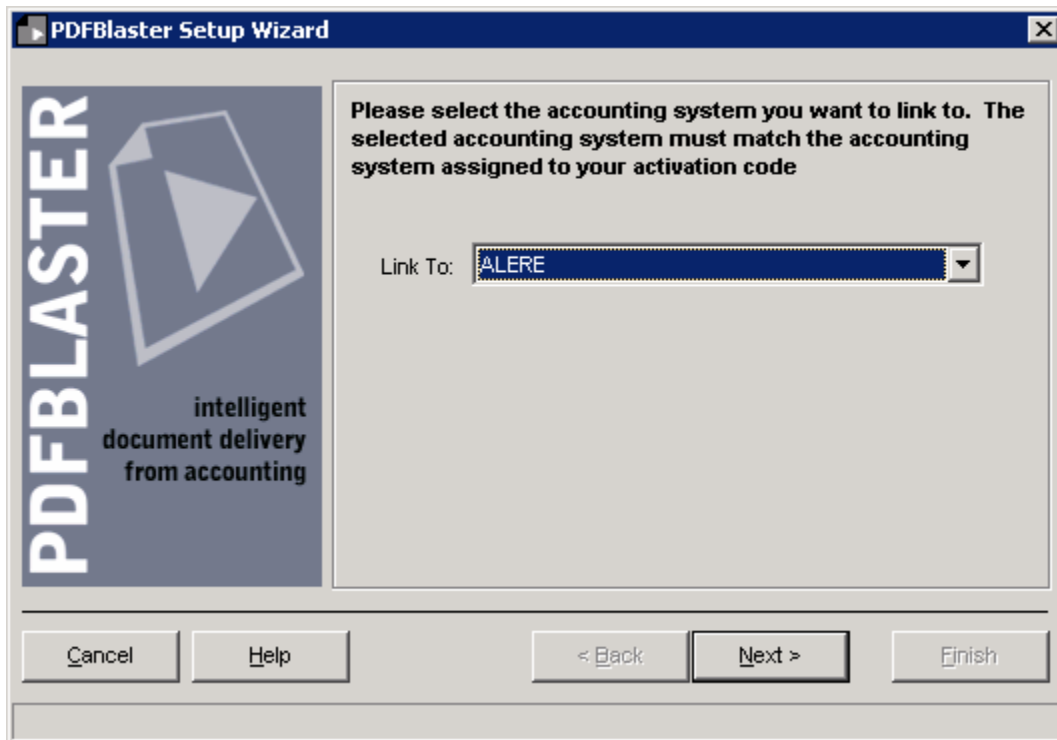
The first step is to select your accounting system from the drop-down list.

Choose "None" because you are not linking to a pre-supported system.

Click the Next button

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.

Configuring PDFBlaster To Work With Your SMTP Server

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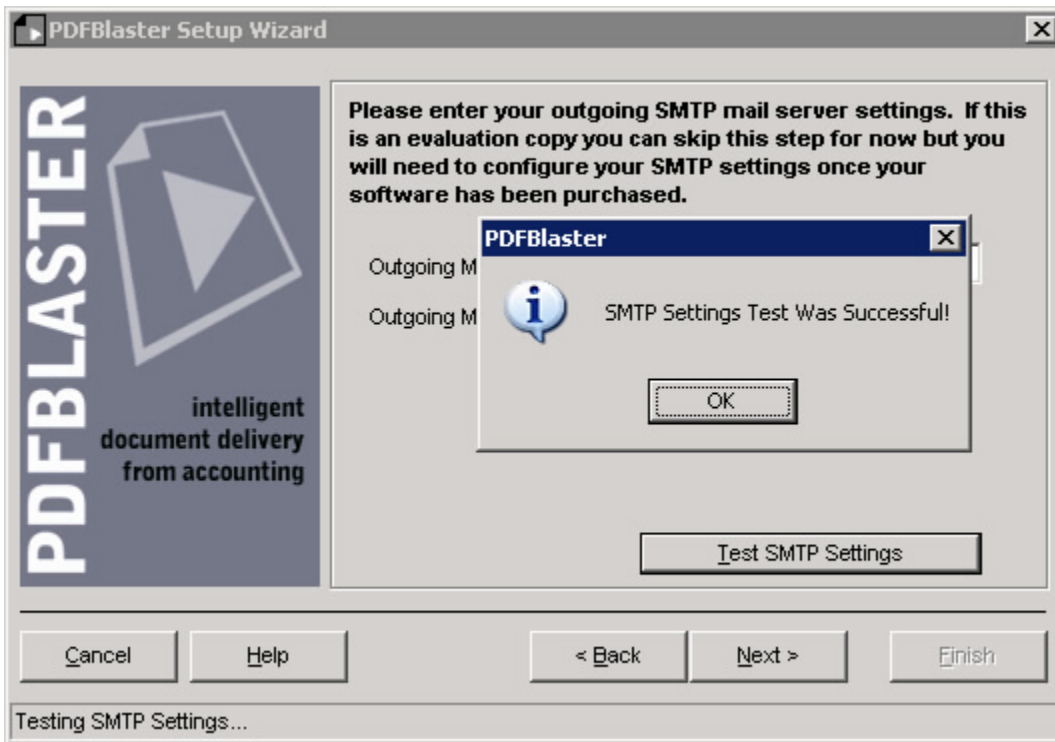
After you enter your outgoing SMTP server settings, click the Test SMTP Settings button to test your configuration. If you settings are correct you will see a response dialog like to one shown above.

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 you test was successful, click Next to continue.

Entering Your PDFBlaster Activation Code
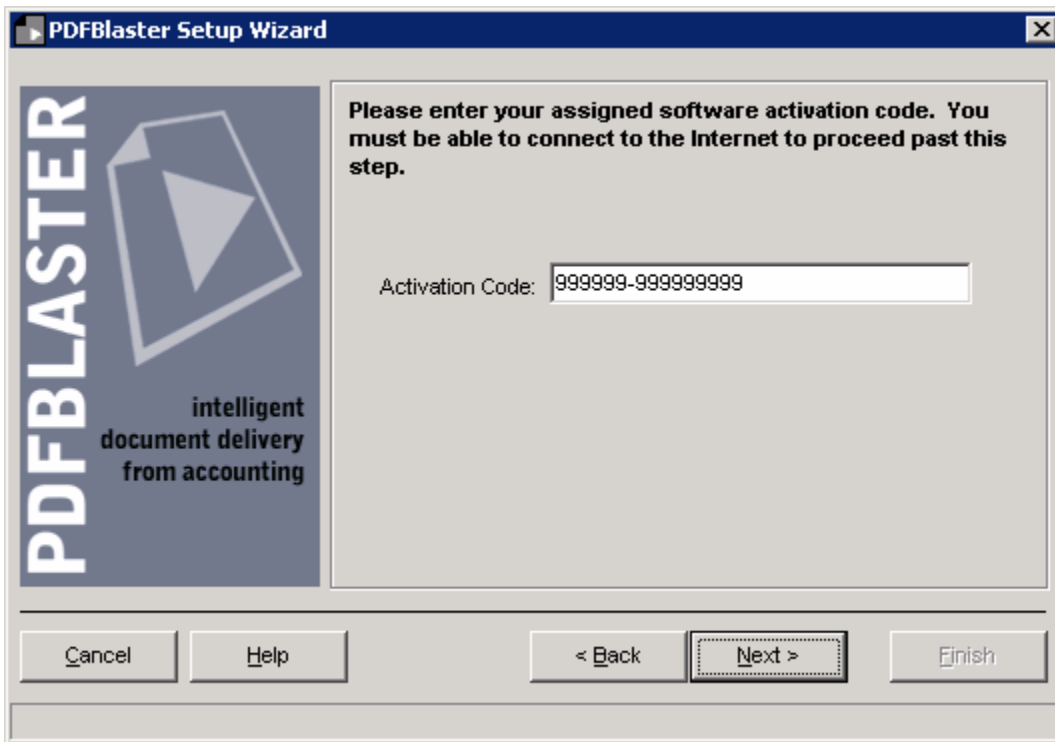
Please enter the activation code provided to you via email or from your PDFBlaster reseller. Make sure you enter the number exactly as it is provided, including the dash.

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 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 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.

Linking Your Forms or Application to PDFBlaster

```
Report Designer – test.frx – Page 1

Print Preview                                    ⊠
[⏮] [◀] [🔁] [▶] [⏭]  [100% ▼]  [📤]  [🖨]


        pdfblaster:tocompany=International Business Industries;
        pdfblaster:toname=Robert Goodman;
        pdfblaster:toemail=rgoodman@ibi.com;
        pdfblaster:tofax=114/852-5300;
        pdfblaster:fromname=John Doe;
        pdfblaster:fromemail=sales@pdfblaster.com;
        pdfblaster:fromcompany=PDFBlaster;
```
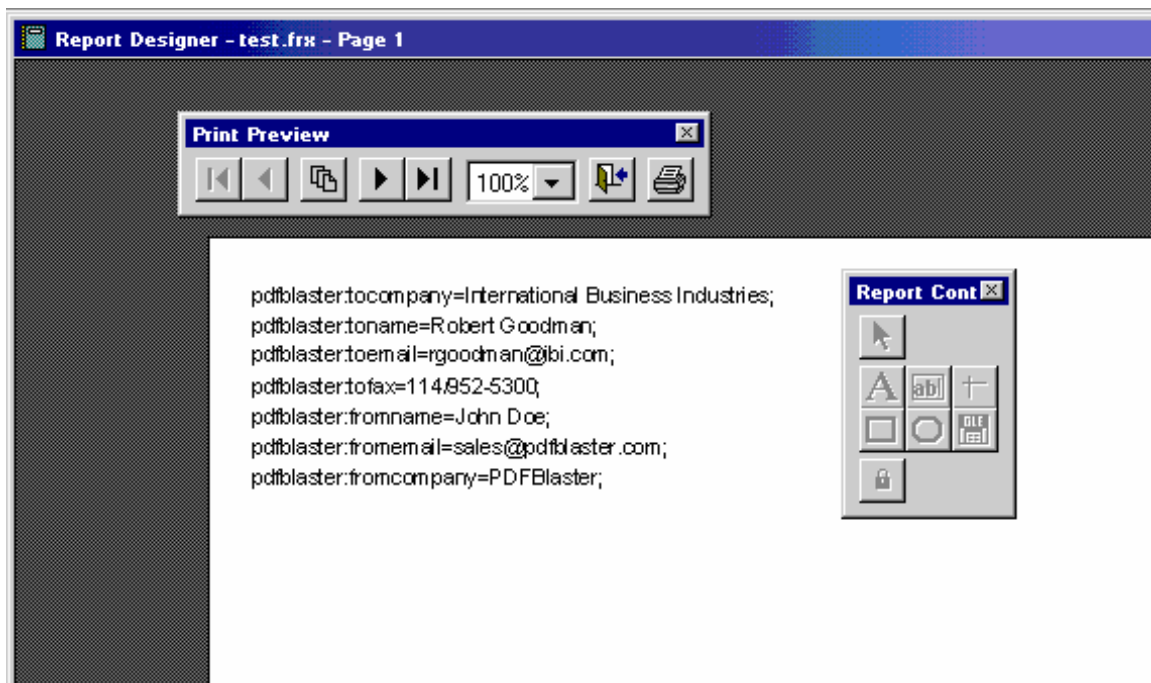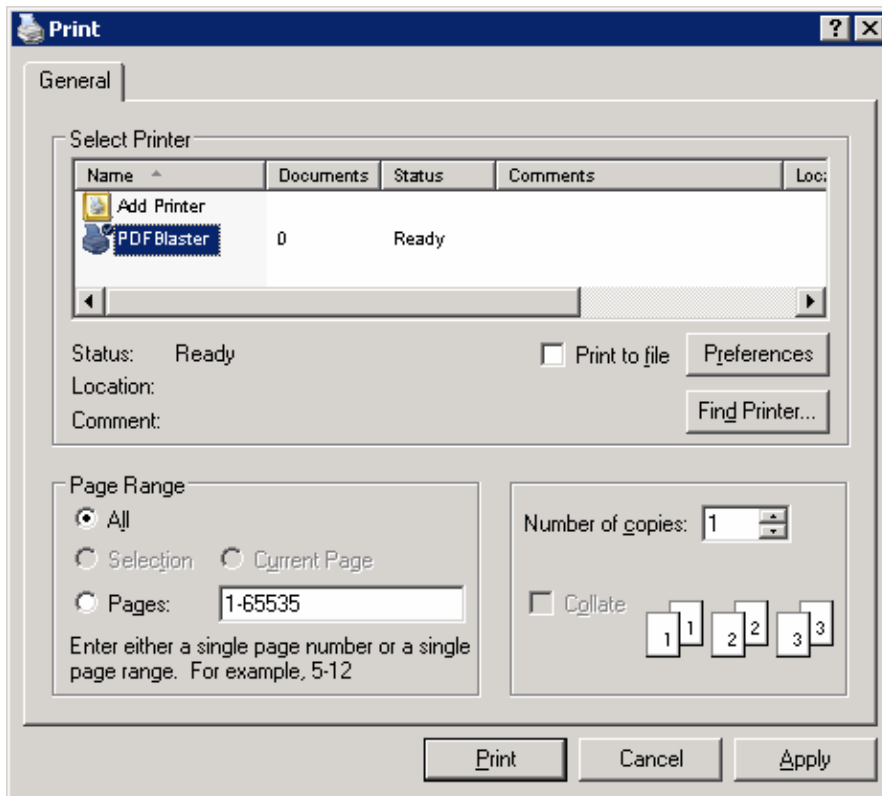
IMPORTANT:

At this point, you will need to modify the forms or documents that will be sent to PDFBlaster. Please read the "Custom Report/Document API" section at the very end of this guide.

After doing this, you can continue from this point to print to PDFBlaster.

Printing To PDFBlaster From Your Application

```
Print                                                    ? X
┌─────────────────────────────────────────────────────────┐
│ General │                                                │
│                                                          │
│  ┌─ Select Printer ──────────────────────────────────┐  │
│  │ Name      ▲  Documents  Status   Comments    Loc:  │  │
│  │ 📁 Add Printer                                      │  │
│  │ 🖨 PDFBlaster      0        Ready                   │  │
│  │ ◄                                              ►    │  │
│  └────────────────────────────────────────────────────┘  │
│                                                          │
│  Status:    Ready            ☐ Print to file  Preferences│
│  Location:                                               │
│  Comment:                                   Find Printer...│
│                                                          │
│  ┌─ Page Range ────────────┐  ┌──────────────────────┐  │
│  │ ⦿ All                   │  │ Number of copies: 1 ▲▼│  │
│  │ ○ Selection ○ Current Page│                        │  │
│  │ ○ Pages:  1-65535       │  ☐ Collate   1 1  2 2  3 3│  │
│  │ Enter either a single page│                        │  │
│  │ number or a single       │                        │  │
│  │ page range. For example, 5-12│                    │  │
│  └──────────────────────────┘  └──────────────────────┘  │
│                      Print      Cancel      Apply        │
└──────────────────────────────────────────────────────────┘
```

Once your PDFBlaster Control Panel is linked to your accounting system and configured correctly, all you need to do is print your custom documents from your application and select the PDFBlaster printer as the selected printer.
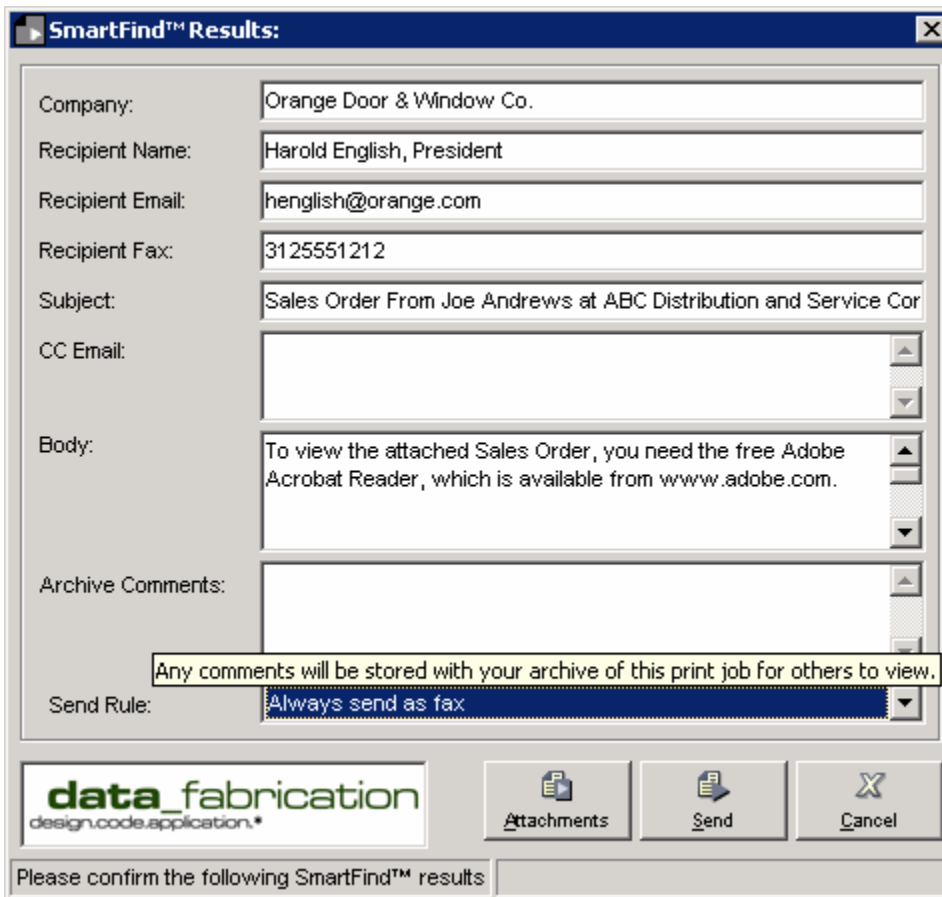
Printing To PDFBlaster
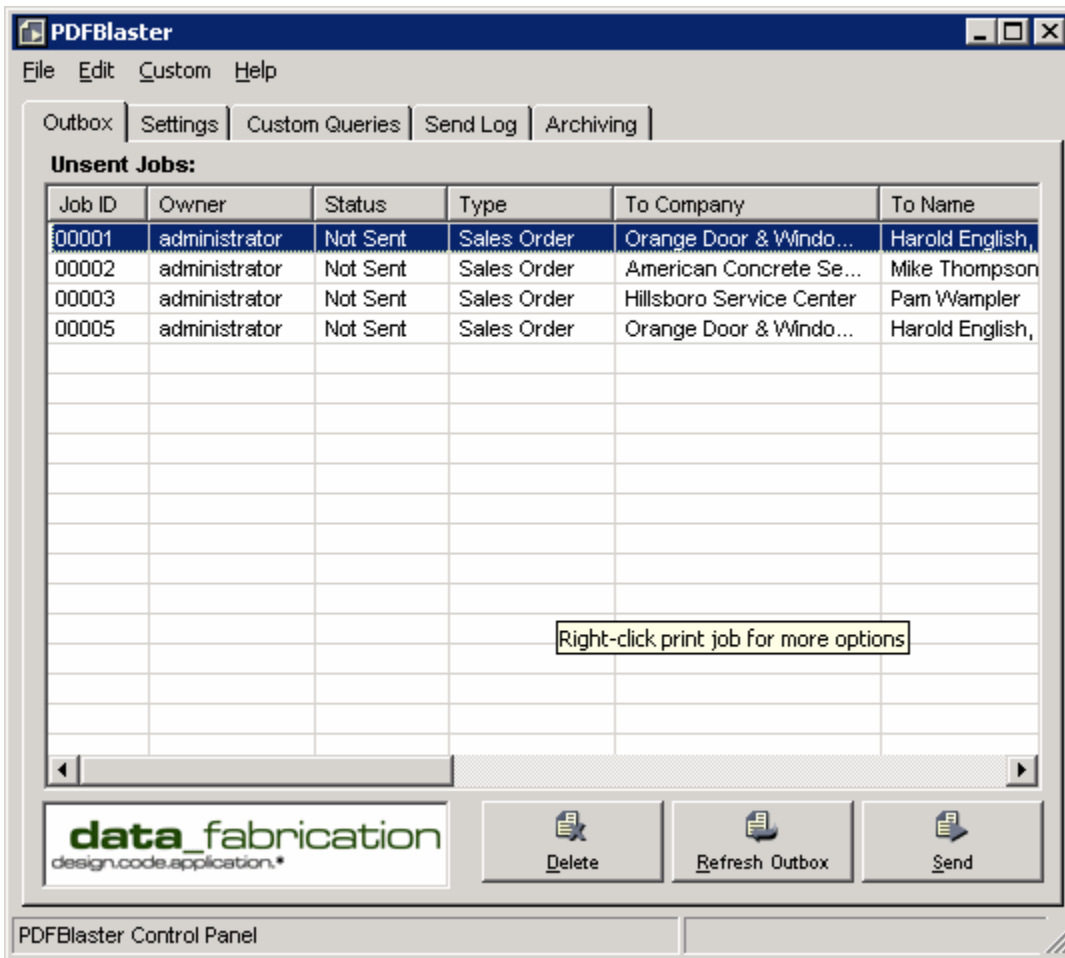
As your jobs are received by the PDFBlaster Control Panel, PDFBlaster will automatically pre-address each sales order in your outbox for you.

Highlight the first job and then click the Send button.

Printing To PDFBlaster

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.

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
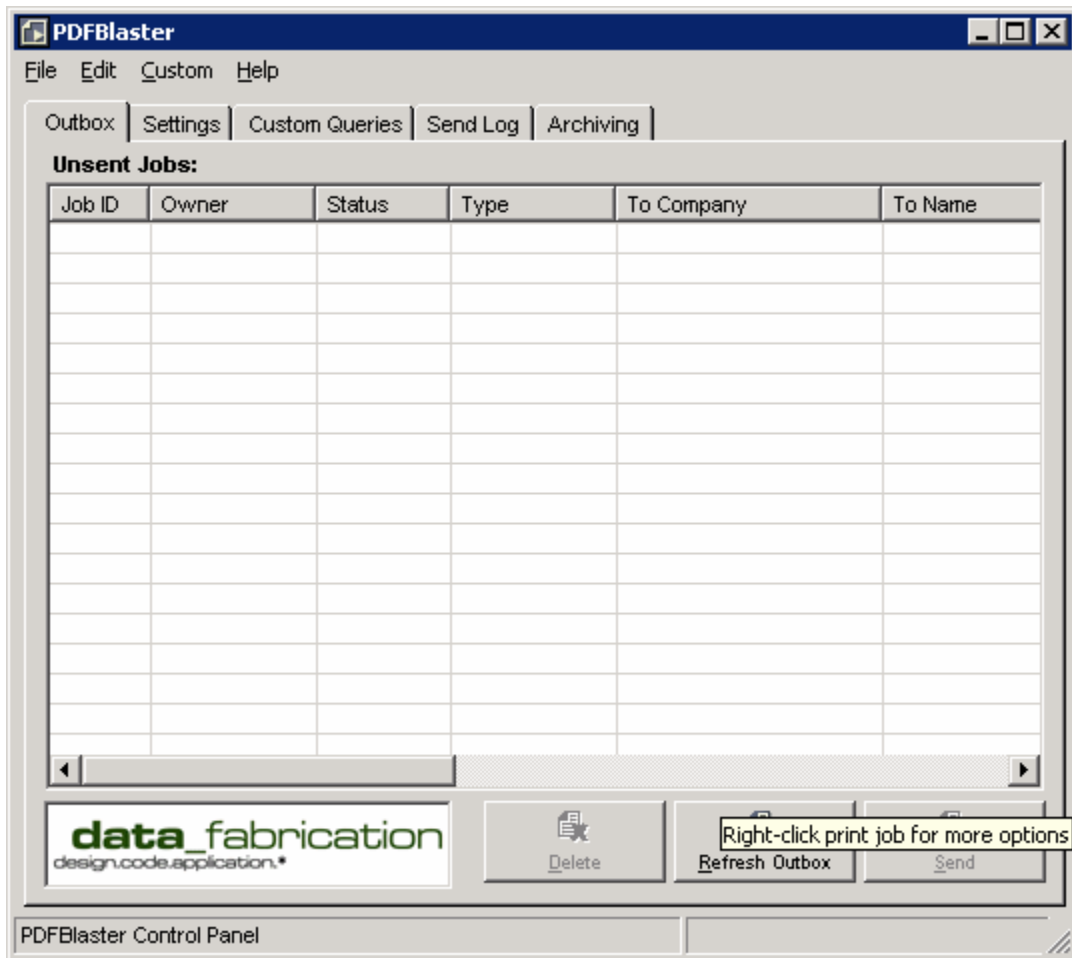
PDFBlaster uses an "outbox metaphor" to receive print jobs from the PDFBlaster printer. These jobs will show up in your outbox screen, shown above and identified by the outbox tab at the top. Depending on your Send Rule settings, print jobs will either queue up in your outbox until you send them yourself 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
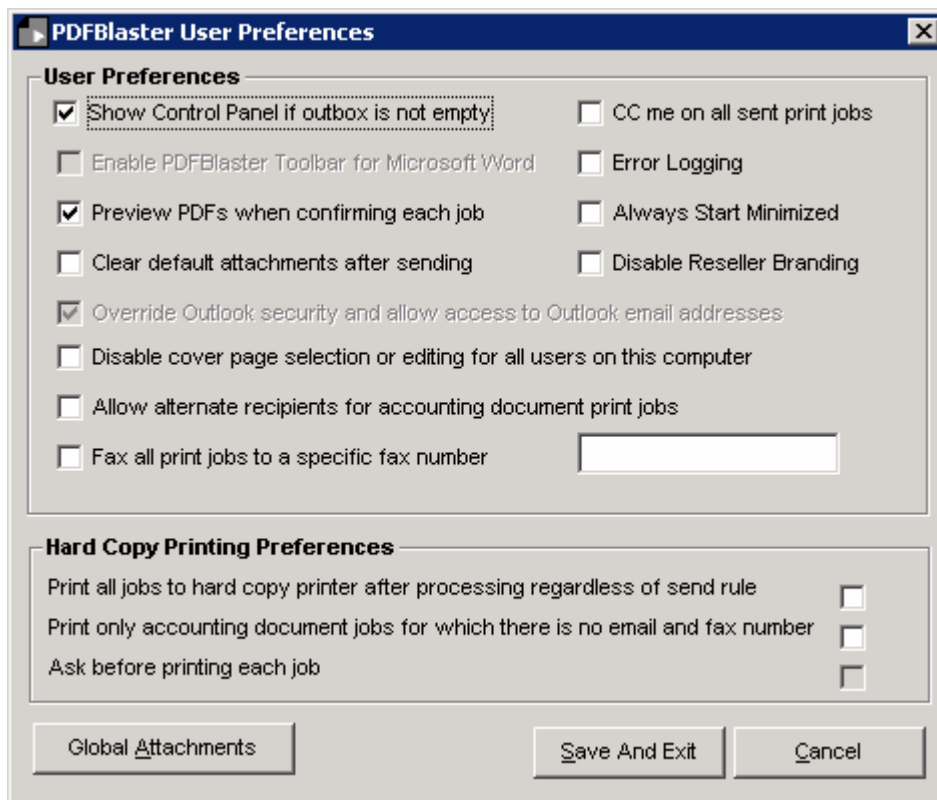
You can access the User Preferences screen by selecting Edit -> Preferences from the PDFBlaster main menu. Most of these options are self-explanatory but the most common preferences are:

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.

Custom Report/Document API

The following pages will detail some simple changes you need to make to your documents and forms to allow them to work with PDFBlaster.

Linking Report Forms Or Print Streams To The PDFBlaster Printer Driver

Overview

PDFBlaster can be integrated with external reports and software programs through a simple process of embedding formatted "link strings" in the print job or report form that contain the necessary recipient data (i.e. fax number, recipient name, email etc).   The benefit of this type of integration is that by embedding link string data within the print job, the PDFBlaster printer driver can be fully integrated with virtually any software program, regardless of underlying database

PDFBlaster Link Strings

DocType   (optional). Forces the current print job to one of the pre-defined PDFBlaster document types. For multiple pages, PDFBlaster will assume each successive page is part of the currend document named by the doctype value until it finds another embedded doctype value. Accepted values are:

                                      0 = custom
                                      1 = statement
                                      2 = sales order
                                      3 = packing slip
                                      4 = pick ticket
                                      5 = credit memo
                                      6 = purchase order
                                      7 = invoice
                                      8 = quote/bid
                                      9 = acknowlegement
                                      10 = RMA

DocNum   (optional). Sets the file name of the PDF to a specific name or number. Can include both numbers and/or text.

Tocompany   (optional). Name of recipient's company

Toname   (optional). Recipients name

Toemail   (optional if tofax field contains data). Recipient's email address.

Ccemail   (optional). Email address (or addresses separated by a comma) that will be sent a CC Email of the original send job

Tofax   (optional if foemail field contains data). Recipient's fax number

Fromcompany   (optional) Name of the company the sending the fax or email

Fromname   (optional) if this field is omitted PDFBlaster will use the from name specified in the Control Panel. Name of the person sending the fax or email.

Fromemail   (optional) if this field is omitted PDFBlaster will use the from email address specified in the Control Panel. Email address of the person sending the fax or email.

Subject   (optional). Subject of the email of fax. If sending a fax, the subject appears on the coversheet.

Emailbody1[10]   (optional). Lines 1-10 of the email message. If sending as a fax, this message will appear on the cover page. Each emailbody link string must occupy it's own line.

Attachment1[99]   (optional). Automates the addition of attachments to the print job. Up to 99 attachments can be added Each attachment link string must occupy it's own line and use a forward slash (/) instead of a back slash (\) when embedding the full path and file name. Attachments are added after the master document in succession.

SendAs   (optional). Override the default send rule specified in the PDFBlaster control panel. F or f means always send fax. E or e means "always send as email", B or b means always send both a fax and email.

Syntax Example

Pdfblaster:doctype=0;
Pdfblaster:tocompany=Your Company;
Pdfblaster:toname=Joe User;
Pdfblaster:toemail=joeuser@yourcompany.com;
Pdfblaster:ccemail=admin@yourcompany.com,sales@yourcompany.com;
Pdfblaster:tofax=8885551234;
Pdfblaster:fromcompany=Data Fabrication, Inc.;
Pdfblaster:fromname=Sales Department;
Pdfblaster:fromemail=sales@datafabrication.com;
Pdfblaster:subject =Important Document Is Attached;
PDFblaster:docnum=10343;
Pdfblaster:emailbody1=This is an important document;
Pdfblaster:emailbody2=If you would like to view it you will need the Adobe Acrobat reader;
Pdfblaster:sendas=e;
Pdfblaster:attachment1=c:/my documents/pricelist.doc;
Pdfblaster:attachment2=c:/my documents/disclaimer.doc;

Formatting Rules

- Embed only one PDFBlaster link string per line

- Always start the string with "PDFBlaster:" (include the colon), followed by the field name plus "=", then include the field data

- Use a semi-colon at the end of each field to terminate the field

- Do not use carriage returns or form feeds

- Either the "toFax" or "toEmail" link string must be present and contain data or the document will not be delivered

- Fax number should be numeric characters only (no dashes or slashes)

- Data can be upper or lower case

- Field order is not important

- For best results use Printer fonts (not TrueType fonts) when embedding the field data on the form. Good choices for printer fonts are Helvetica, Times (not Times New Roman) and Courier (not Courier New). You can also use Arial in most cases even though it is not a printer font.

- After the PDFBlaster link string header page is received subsequent pages do NOT need embedded link string data until a new recipient data is required. The PDFBlaster driver will assume that all following pages belong to the recipient defined in the prior link data string section until new link string fields are discovered in a new header page.

- Use smaller font sizes to conserve space on the form. Since the actual link string data will not appear on the report you do not have to be concerned with readability. Make sure each link string does NOT wrap to a second line.

- To suppress embedded link string output at run-time to hard-copy printers, set the font color to "white".
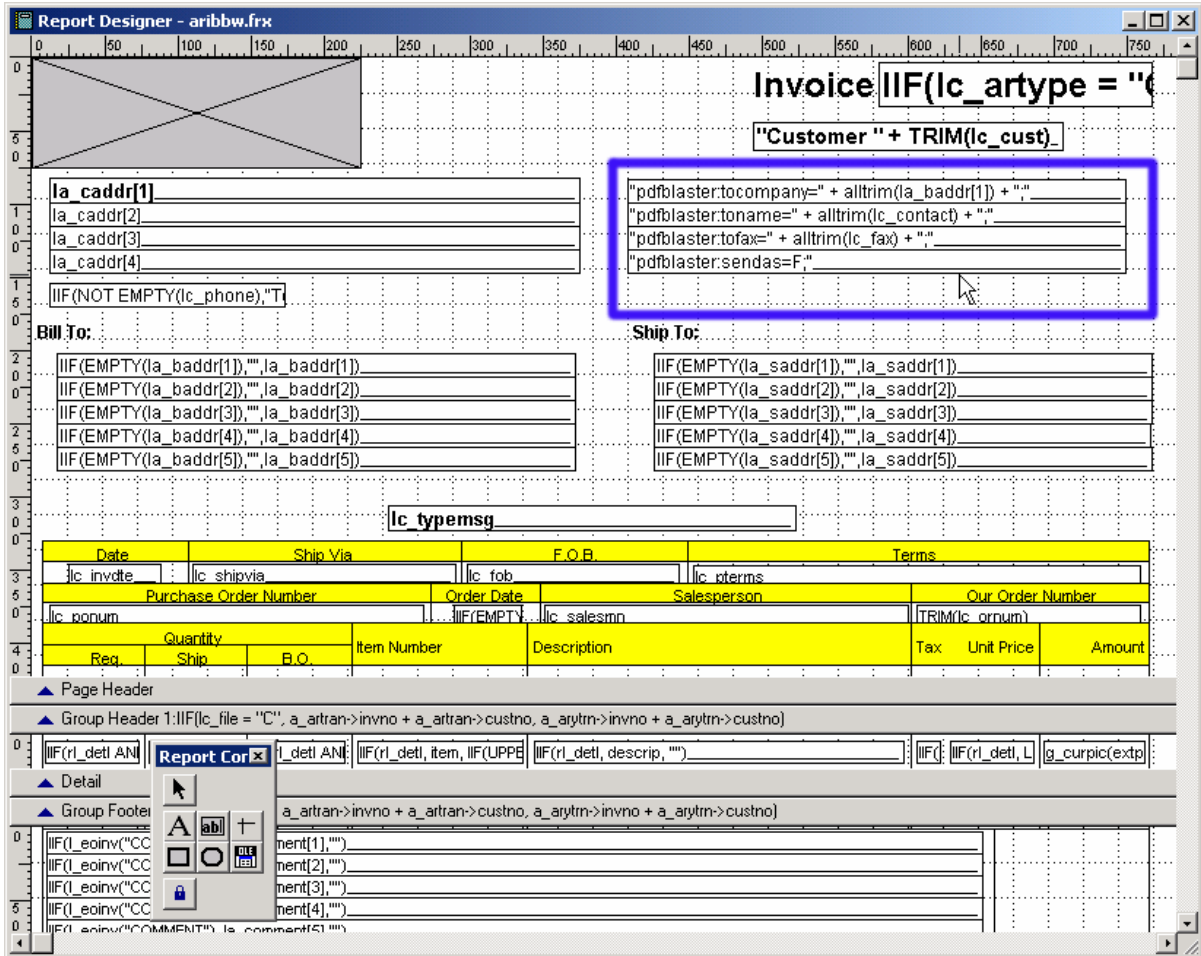
Example

Figure 1 PDFBlaster Link String Example

The graphic above shows an Invoice report form the ACCPAC Pro Series accounting system. Using the FoxPro report writer, the PDFBlaster link string fields have been added to the form and the formatted fields will put data from the underlying database at runtime.