PDFBLASTER

intelligent document delivery from accounting

PDFBlaster
QuickStart Guide

For Accountmate For SQL

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.
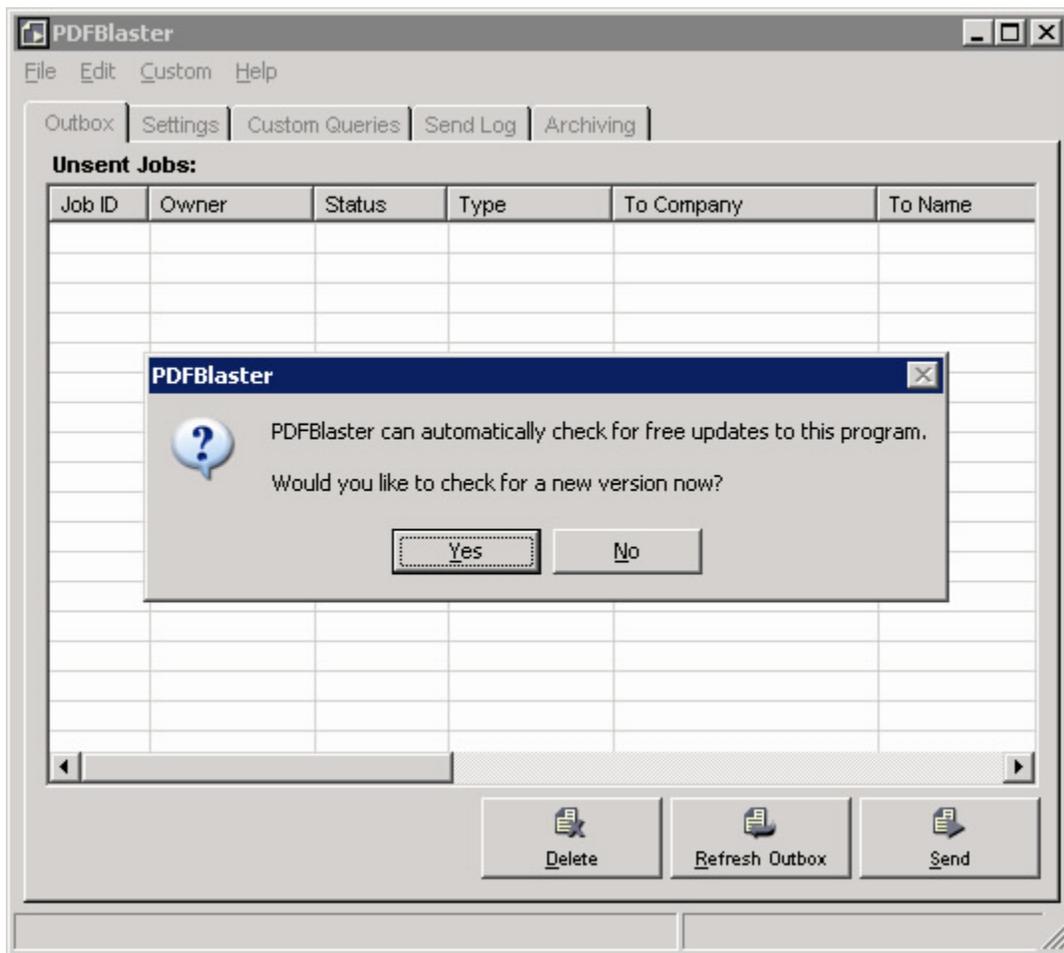
Completing the PDFBlaster Setup Wizard

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.

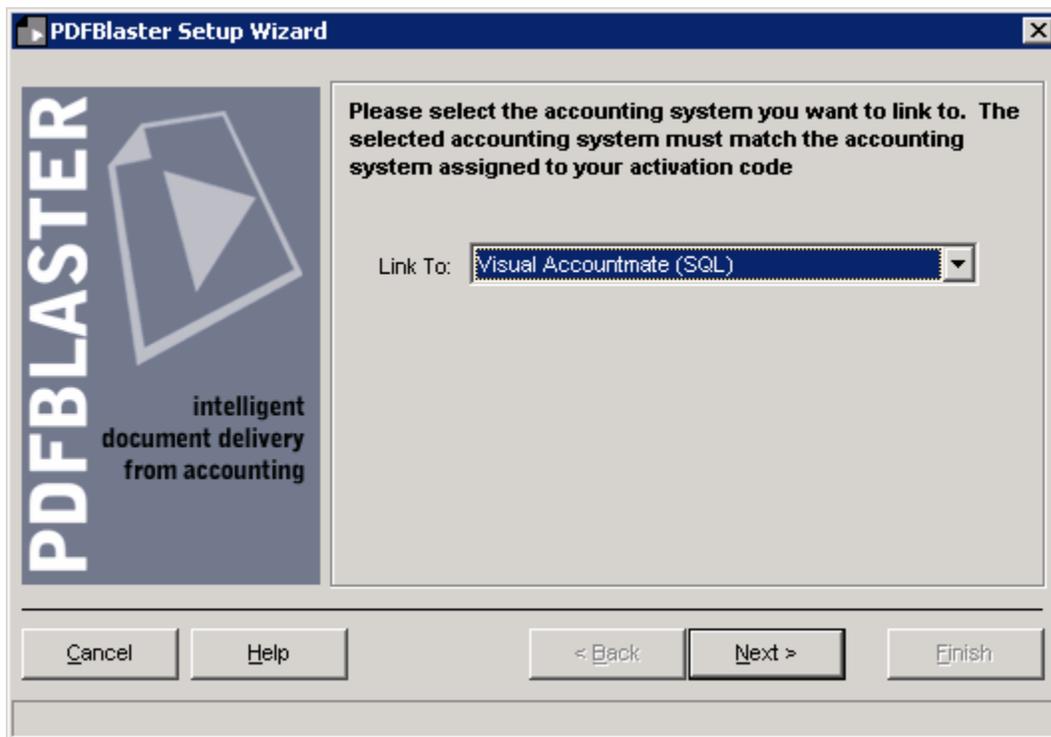## Starting PDFBlaster For the First Time

```
PDFBlaster                                                    _ □ ×
File  Edit  Custom  Help

 Outbox | Settings | Custom Queries | Send Log | Archiving |
Unsent Jobs:

 Job ID | Owner      | Status    | Type    | To Company      | To Name


          PDFBlaster                                         ×

              ?    PDFBlaster can automatically check for free updates to this program.

                   Would you like to check for a new version now?

                         [  Yes  ]        [  No  ]



 ◄                                                                 ►


                           Delete    Refresh Outbox    Send
```

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, 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 Visual Accountmate (SQL)

Click the Next button

Linking To Your Accountmate For SQL Server Database

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

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

Enter the 3 digit company ID of the Accountmate company you wish to link to.

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

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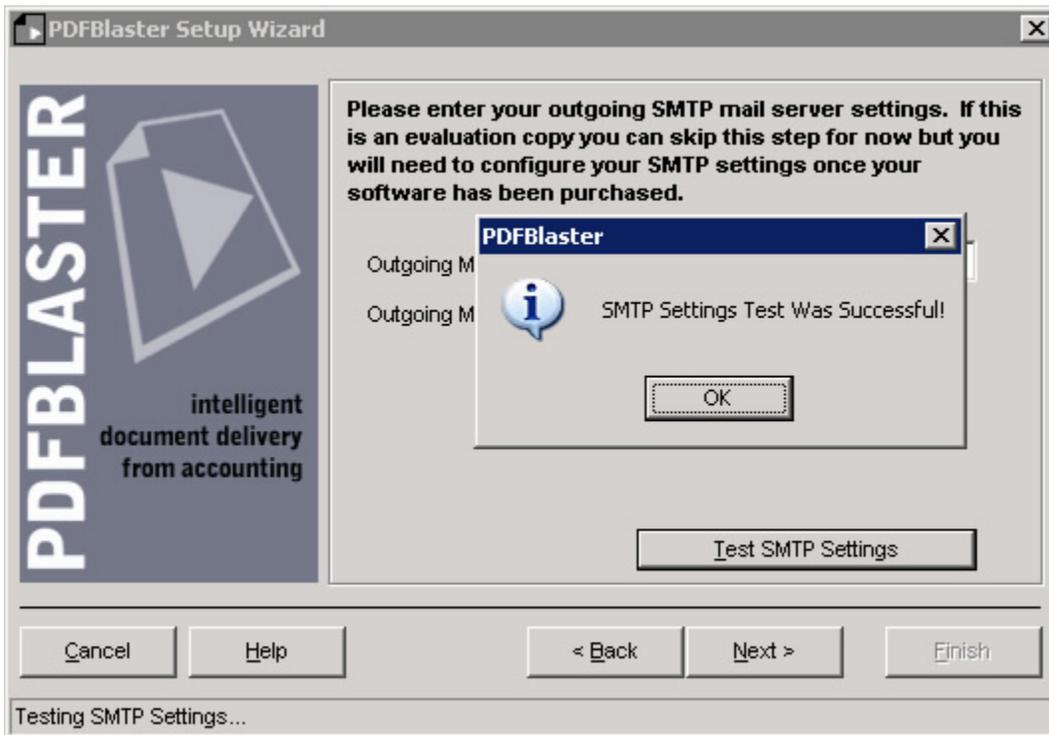
After you enter your outgoing SMTP server settings, click the Test SMTP Settings button to test your configuration. If you settings are correct you will see a response dialog like to one shown above.

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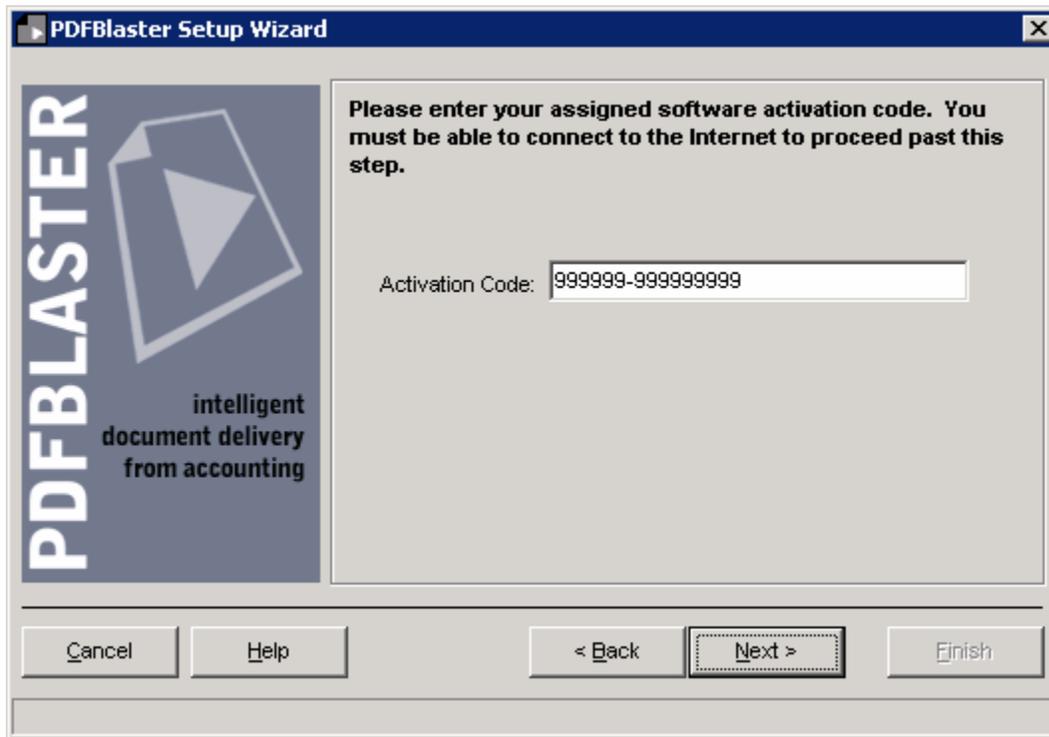
Please enter the activation code provided to you via email or from your PDFBlaster reseller. Make sure you enter the number exactly as it is provided, including the dash.

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.

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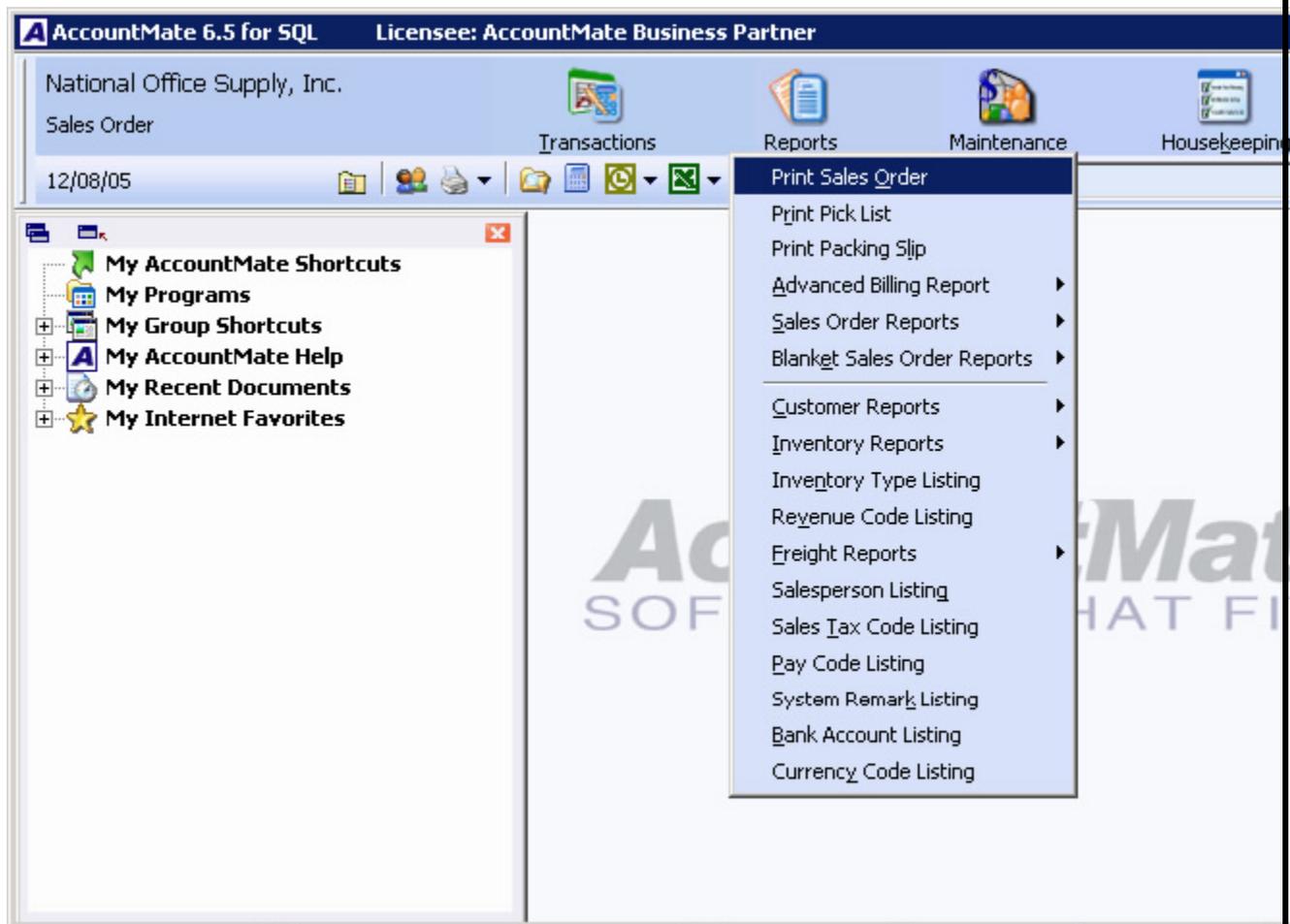
Once your PDFBlaster Control Panel is linked to your accounting system and configured correctly, all you need to do is print your accounting documents (invoices, statements, purchase orders, etc.) from your accounting system and select the PDFBlaster printer as the selected printer.

For example, suppose you want to send out your sales orders from Accountmate. Open the Sales Order module and click Reports -> Print Sales Order as shown above.

Printing To PDFBlaster From Accountmate For SQL Server

Enter and range criteria to filter your sales order output. In our example we are going to print all sales order from all dates and customers, including reprints.

Next click the Printer button.

Printing To PDFBlaster From Accountmate For SQL Server
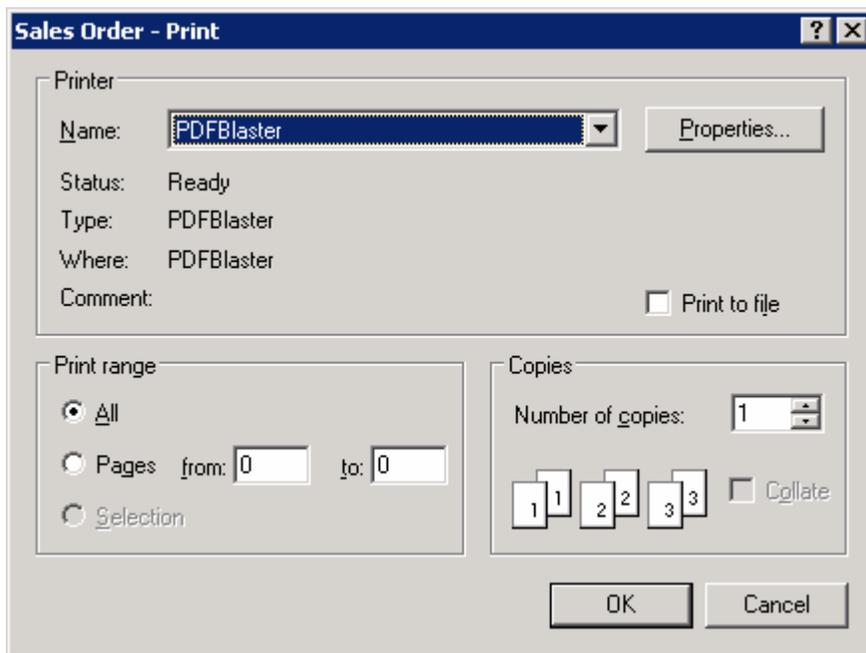
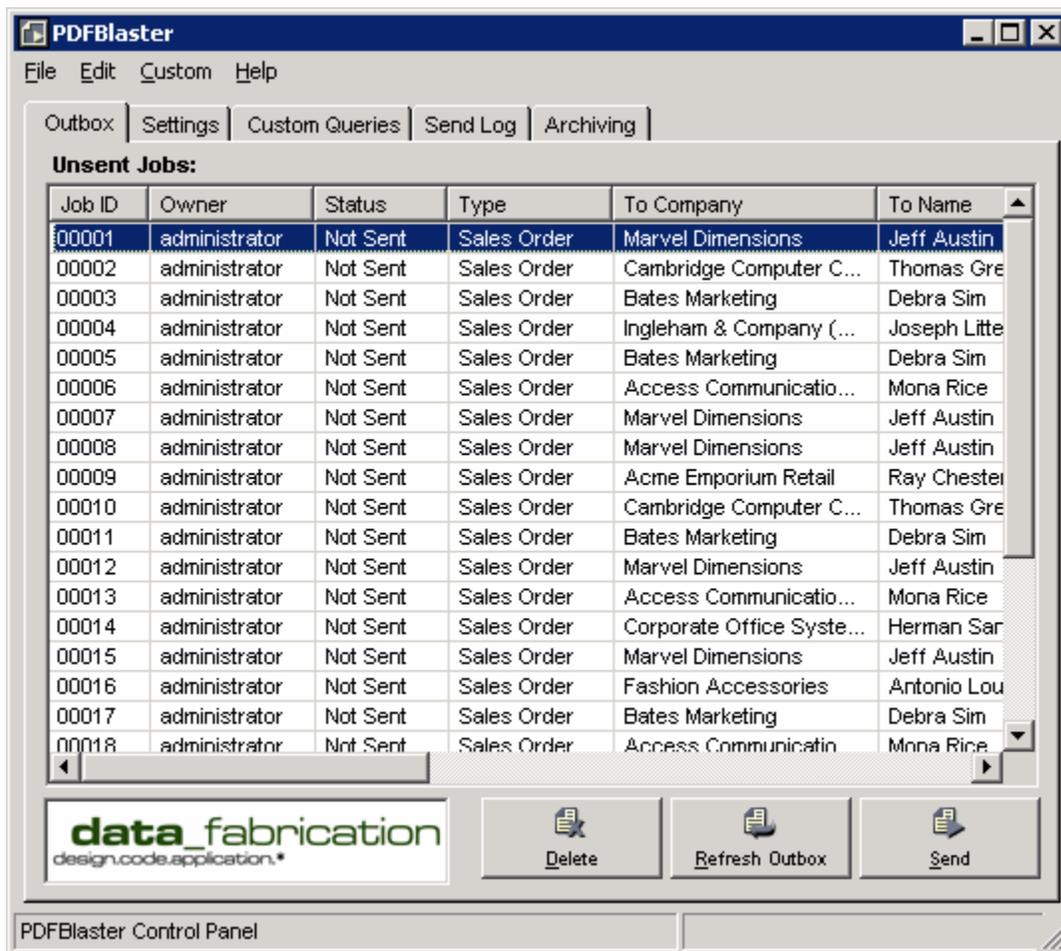Make sure you select PDFBlaster as your output printer. If it's not your default printer change the printer name dropdown and select PDFBlaster as the printer.

Your accounting system will then start printing your sales orders to the PDFBlaster printer
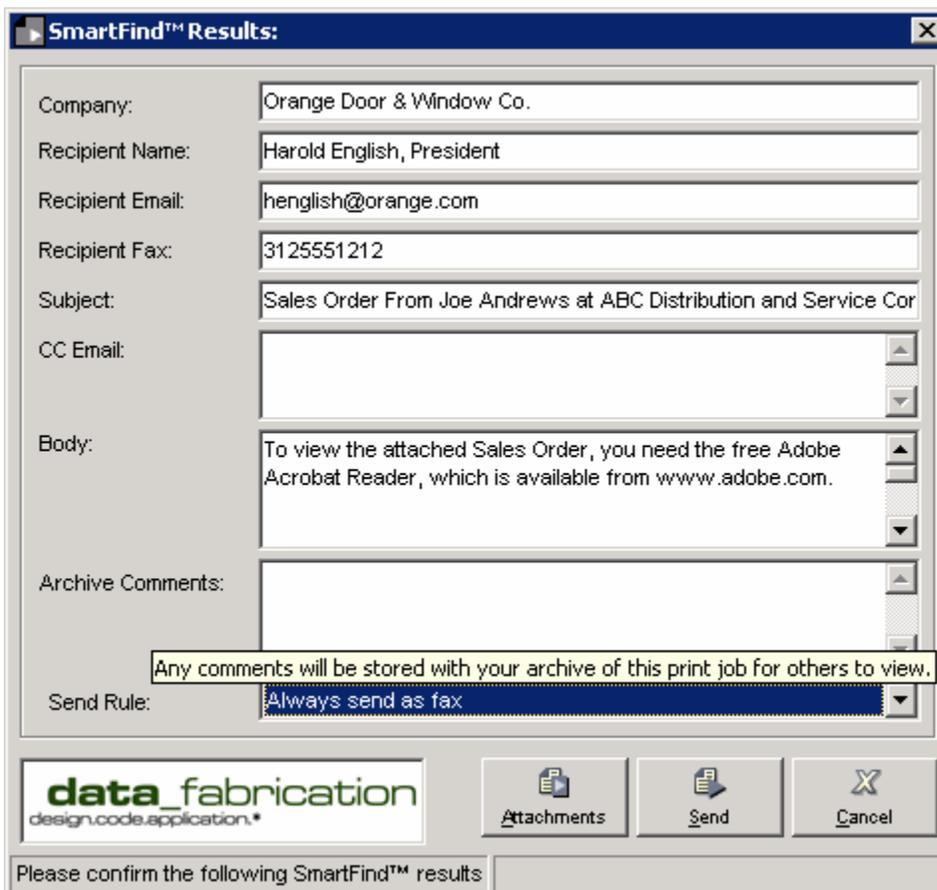
Printing To PDFBlaster

Job ID	Owner	Status	Type	To Company	To Name
00001	administrator	Not Sent	Sales Order	Marvel Dimensions	Jeff Austin
00002	administrator	Not Sent	Sales Order	Cambridge Computer C...	Thomas Gre
00003	administrator	Not Sent	Sales Order	Bates Marketing	Debra Sim
00004	administrator	Not Sent	Sales Order	Ingleham & Company (...	Joseph Litte
00005	administrator	Not Sent	Sales Order	Bates Marketing	Debra Sim
00006	administrator	Not Sent	Sales Order	Access Communicatio...	Mona Rice
00007	administrator	Not Sent	Sales Order	Marvel Dimensions	Jeff Austin
00008	administrator	Not Sent	Sales Order	Marvel Dimensions	Jeff Austin
00009	administrator	Not Sent	Sales Order	Acme Emporium Retail	Ray Chester
00010	administrator	Not Sent	Sales Order	Cambridge Computer C...	Thomas Gre
00011	administrator	Not Sent	Sales Order	Bates Marketing	Debra Sim
00012	administrator	Not Sent	Sales Order	Marvel Dimensions	Jeff Austin
00013	administrator	Not Sent	Sales Order	Access Communicatio...	Mona Rice
00014	administrator	Not Sent	Sales Order	Corporate Office Syste...	Herman Sar
00015	administrator	Not Sent	Sales Order	Marvel Dimensions	Jeff Austin
00016	administrator	Not Sent	Sales Order	Fashion Accessories	Antonio Lou
00017	administrator	Not Sent	Sales Order	Bates Marketing	Debra Sim
00018	administrator	Not Sent	Sales Order	Access Communicatio...	Mona Rice

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

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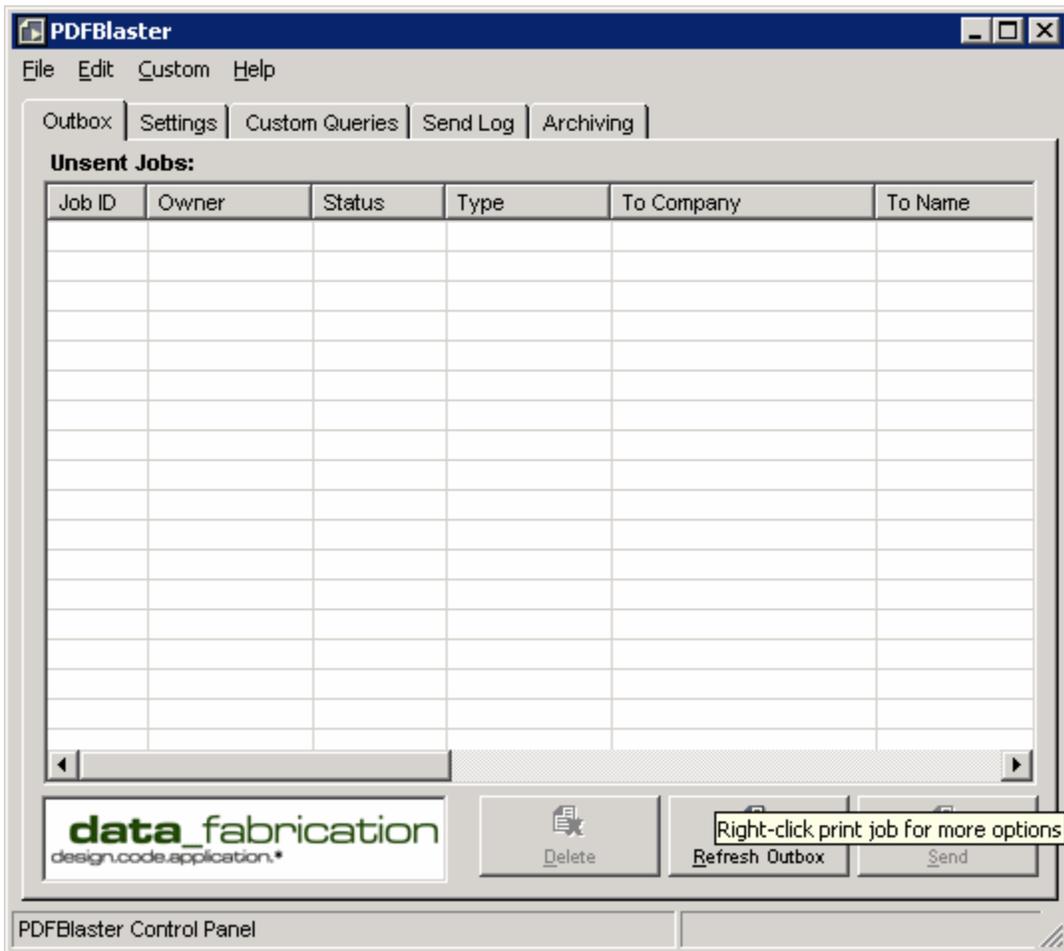
PDFBlaster uses an "outbox metaphor" to receive print jobs from the PDFBlaster printer. These jobs will show up in your outbox screen, shown above and identified by the outbox tab at the top. Depending on your Send Rule settings, print jobs will either queue up in your outbox until you send them yourself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

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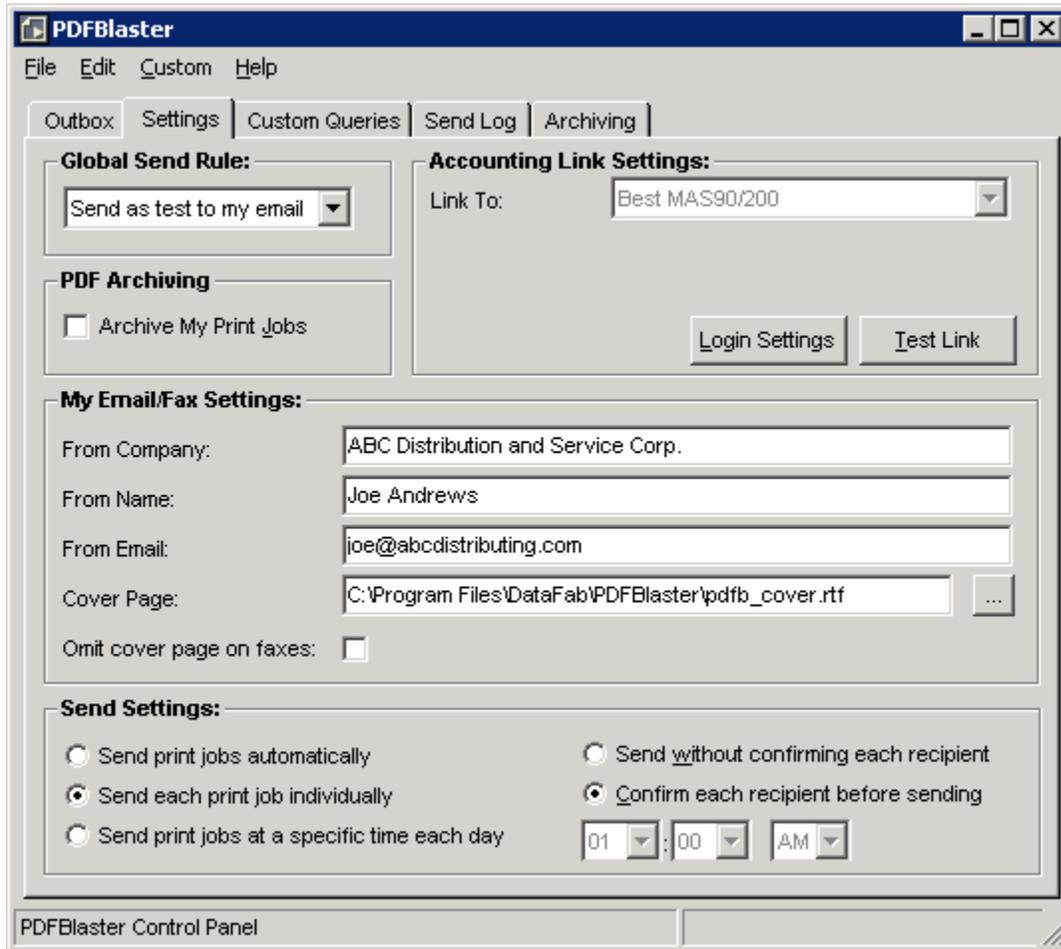
The PDFBlaster Settings tab contains settings that control how you want to process print jobs in your outbox.

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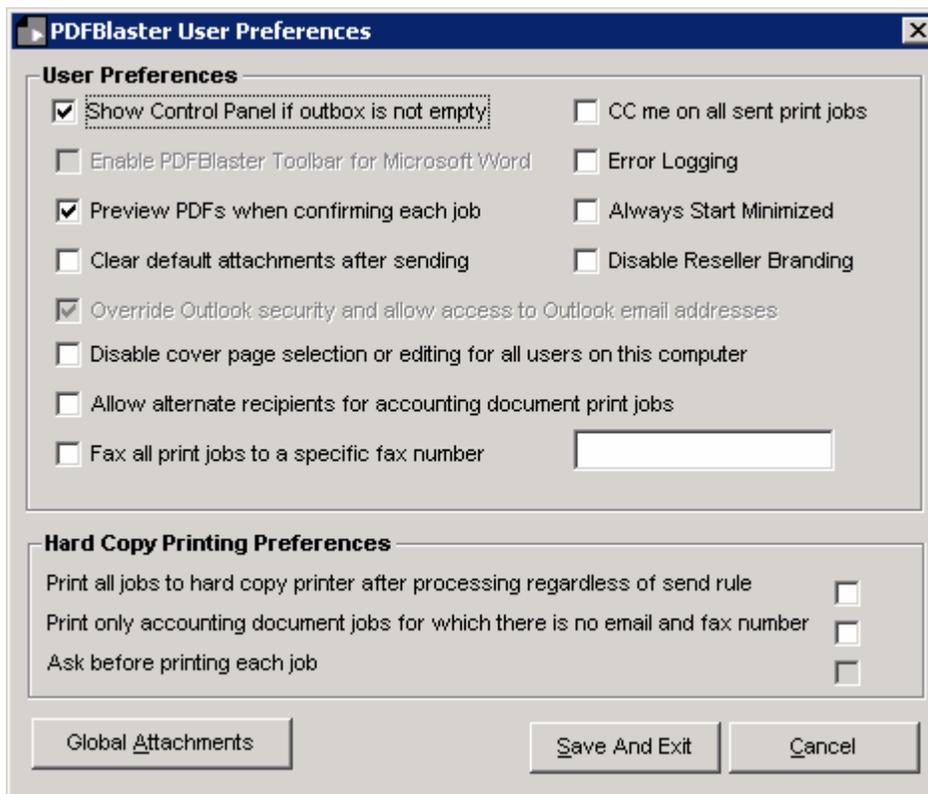
You can access the User Preferences screen by selecting Edit -> Preferences from the PDFBlaster main menu. Most of these options are self-explanatory but the most common preferences are:

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.