



PRINTER'S PLAN

by SoftUSE, Inc.

Emailing PDF files of Invoices and Quotes to Customers

*Instructions are for
Printer's Plan Versions 2010 and later.*

In order to send PDF copies of Quotes, Invoices, Statements, and other Printer's Plan documents by email, you must have a PDF printer driver installed on each computer from which you will send the emails. If you use Adobe Acrobat for this purpose, each computer must have the full version of Acrobat. There are many alternatives to Acrobat, and some of these PDF writers, such as CutePDF Writer and PrimoPDF, are free and downloadable from the Internet. In this document, we explain the set up procedures for the Adobe PDF and CutePDF printers.

Here is an outline of the setup procedure that is detailed in this document:

1. If you do not already have a PDF printer (PDF writer/converter/creator) installed on your computer, install one.
2. Create a new folder on your computer or on the server exclusively for the PDF files of the Quotes/Invoices/Statements. With some PDF printers, such as with Acrobat's, you may need to assign the new folder as the default output folder for the PDF files it creates.
3. In Printer's Plan, specify the PDF printer & the output folder you will be using.

Emailing PDF documents from Printer's Plan works as follows:

1. In Printer's Plan, when you click the Email PDF button in the Print window, Printer's Plan sends the document to the PDF printer.
2. The PDF printer converts the document into a PDF file and saves it to an output folder.
3. Printer's Plan then finds this saved file and, after using your default email application to create a new email, attaches the PDF file to it.

IMPORTANT:

You must complete Parts 1 and 2 on EACH COMPUTER on which you will create PDF attachments.

Part 1:

Set up the output folder for your PDF files of Quotes/Invoices/Statements

Create a special folder for PDF email attachments:

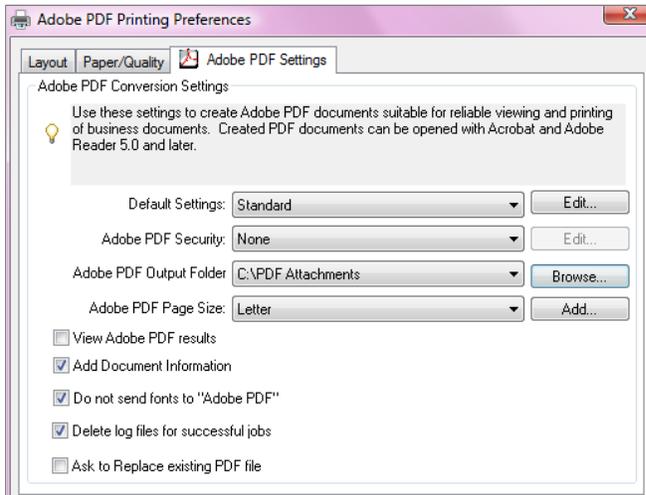
Do not save your PDF files to your C: drive. If you are running Microsoft's Vista operating system, it will not allow you to save files there anyway. We strongly recommend that you create a special folder to save these files, such as one named **PDF Attachments** or **PP PDFs**, either on your local computer or on the server computer (for all workstations to us). The file name of each of the PDFs you create include the Quote/Invoice number (customer number with Statements), and by saving them all to the same place, you will eventually have an organized history of all the PDF files you have sent. (The previous statement of one customer will be replaced with the new statement since the customer name is the same.)

FOR ADOBE PDF PRINTER ONLY:

Assign the new folder as the default Adobe PDF Output Folder

With some PDF printers, such as Acrobat, you need to specify a default output folder for the PDF's it creates, as explained below. *Other PDF printers, such as CutePDF, do not have this setting.*

1. From the Windows **Start** menu ( or ), open the **Control Panel > Printers**.
2. Right-click your PDF printer (usually named 'Adobe PDF') and select **Printing Preferences**.
3. Under the **Adobe PDF Settings** tab, click the **Browse** button to find and select folder you created in step 1 as the **Adobe PDF Output Folder**.



4. Click **OK**.

Part 2: Setting up Printer's Plan to Find and Attach PDFs

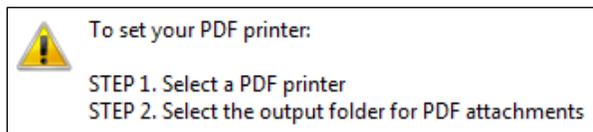
1. In the **Jobs** section, highlight a Job, and click **Print**.



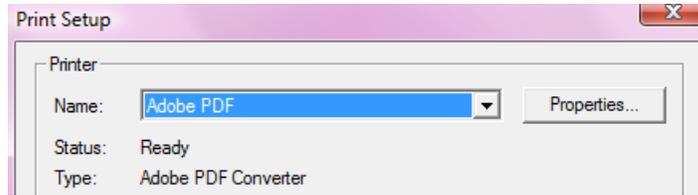
2. In the lower right corner of the **Print** window, click the **Setup PDF** button.



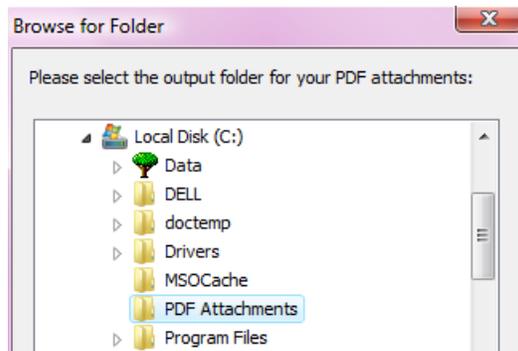
3. The following window appears. Click **OK** to continue.



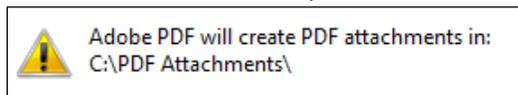
- In the **Print Setup** window, select the PDF printer you plan to use.



- In the **Browse for Folder** window, select the PDF output folder which you created in Part 1, and click **OK**. *NOTE: With this step, you are only showing Printer's Plan where to find the PDFs saved by the PDF printer; you are not telling the PDF printer where to save the file.*



- Printer's Plan will inform you:



Part 3:

Emailing an Quotes/Invoices/Statements from Printer's Plan

- In the **Jobs** section of Printer's Plan, highlight a Quote or an Invoice, and click **Print**. (For Statements, click the **Print** button at the top of the list of customers in A/R.)
- In the **Print** window, click **Email PDF**. This prompts the PDF printer to convert the Quote/Invoice/Statement to a PDF file.



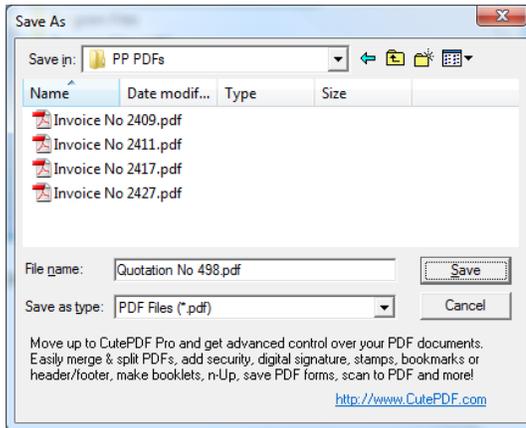
- If you are using:
Adobe PDF printer:

Adobe PDF saves the converted file in the PDF folder you specified in Part 1. (You may or may not get a confirmation window; just click **OK** if you do.)

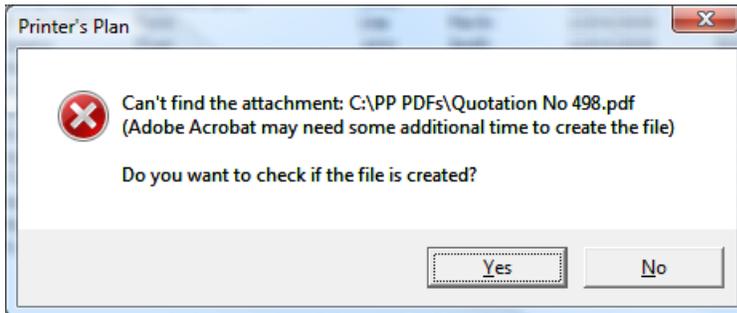
CutePDF:

The **Save As** window will appear. The first time you email a document, for the **Save in:** field, you will need to browse to and select the folder you created in Part 1. The next time you create a PDF with

CutePDF, the **Save In:** field will default to that ("PP PDFs") folder, and all you will have to do in this window is click the **Save** button.



- Printer's Plan immediately starts looking for the newly created PDF file to attach the email. Sometimes it looks too soon, before the PDF has been saved. In this case, you will get the message below. If you do, click **Yes**.



- In the next window, select a Contact (email recipient), and click **Ok**.
- An email will appear with the PDF file attached. Edit the email message as needed and then send it.