



Reference	FINEPRT.doc	Last updated	22 May 2009
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Emailing Documents

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Learning Outcomes

In this lesson you will learn how to

1. Install a Portable Document File (PDF) Printer Driver
2. Configure the PDF driver
3. Set it up to work with SoEasy
4. Email documents

If you have any trouble in setting up a PDF driver or would like training, we provide an affordable service to help you and teach you how. Please select this link if you would like to [book a service](#)

Training

If in any doubt about using the PDF driver or emailing documents please book a training service through the following link [book a service](#)

About PDF Drivers

PDF drivers work in the same way as a printer except, instead of printing a document, it prints the document to a PDF file which you can then

- Save
- Email
- Print

PDF documents can save you paper, ink, time, and money. The great thing about them is that they can be emailed straight to another person.

SoEasy automatically installs a trial version PDF driver when you install SoEasy to your PC.

This is FinePrint's pdfFactory trial version and, in our opinion, one of the best currently available. Other PDFs require you to save the file to your PC, open your email product, attach the file and then send it. With FinePrint you can immediately email the document to a client.

There are free PDF drivers available such as CUTE PDF, but most are time consuming when emailing documents compared to FinePrint which is fast.

If you like the pdfFactory printer driver you will need to purchase it. If you do not purchase it, a small message appears on each PDF document you create that promotes FinePrint.

We think it is a great product so we do promote it, but if anything should go wrong with it, you must seek help from the software manufacturers.

We do not recommend using Adobe's PDF driver as for most PCs it is far too slow to act as an efficient administration PDF driver.

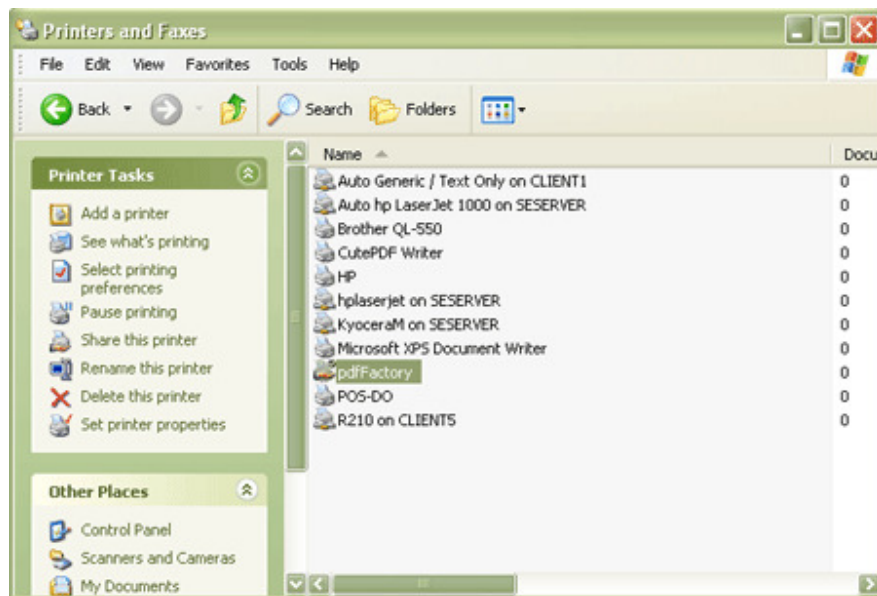
Installing the FinePrint pdfFactory PDF Driver

* For installation of other PDF drivers please refer to the software manufacturer's instructions

When you install SoEasy, the trial version of pdfFactory should automatically install.

You can check this as follows

1. Open your PC's **Control Panel**
2. Select **Printers and Faxes**



Here you can see that the **pdfFactory** printer driver is installed

If it is not go to the following web page and download and install pdfFactory driver. (This is the only one we discuss in our training notes.)

<http://www.fineprint.com/>

The pdfFactory must be installed to each PC if you want each user to be able to use it.

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Configure pdfFactory

The default installation suits most users so there is not normally a need to set up the program. If there is an issue there are two areas that can be configured as long as you know what you are doing:

Set up area 1

1. In the **Printers and Faxes** window, right-click your mouse on the **pdfFactory** and select **Properties**.
2. Work your way through the settings.

Set up area 2

When you actually print a document to the PDF driver, there are other set up options available.

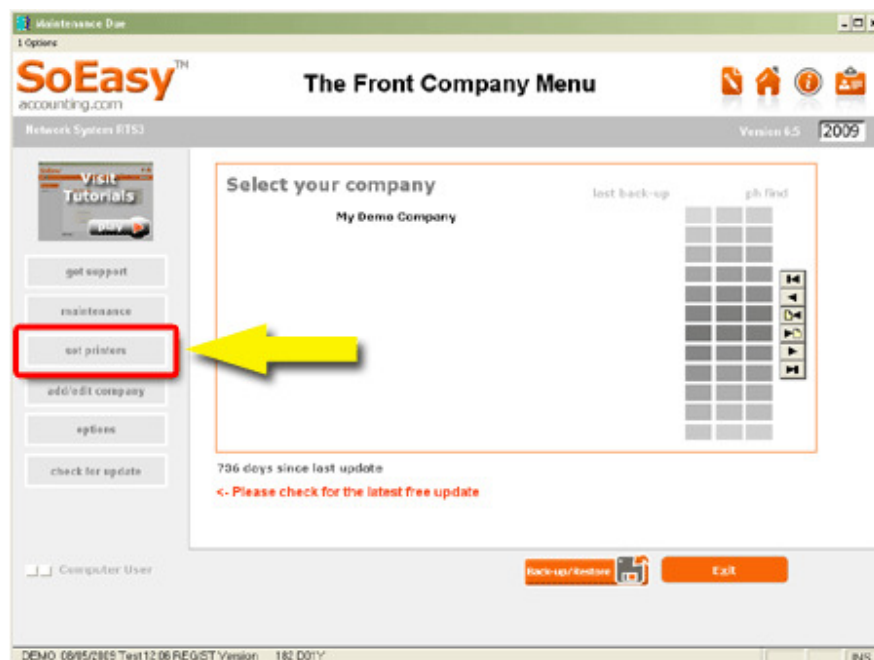
Warning! Do not change anything unless you are confident that you know what you are doing. Please note: support on third party products is always a chargeable service.

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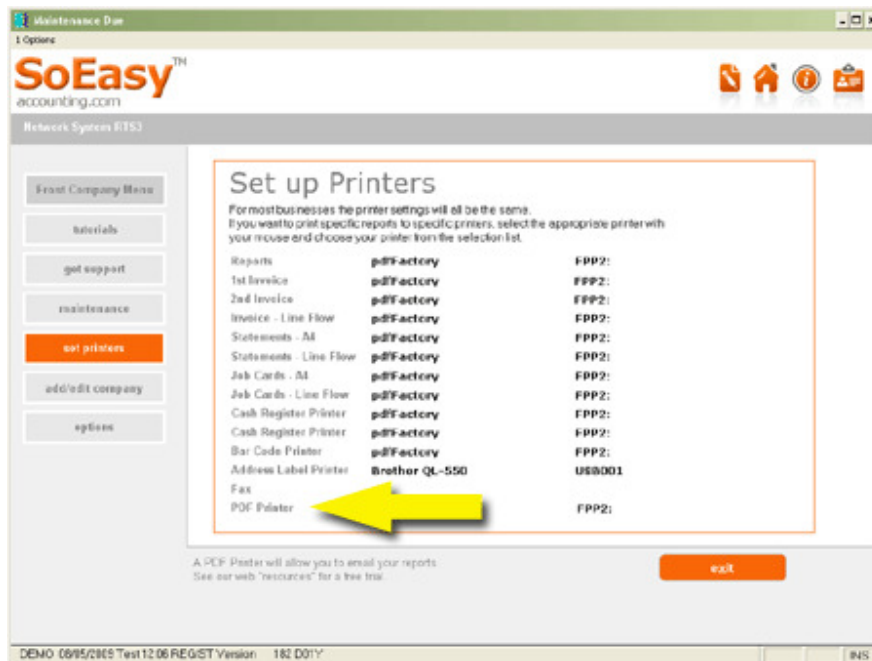
Set it up to work with SoEasy

Make sure you have installed the pdfFactory driver on each PC you want available to the user.

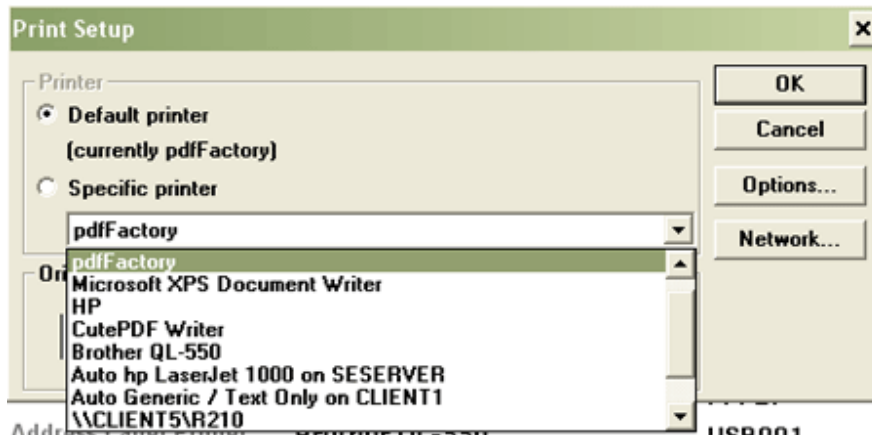
1. Open SoEasy to **The Front Company Menu**.
2. Select **set printers**.



3. Select **PDF Printer**.



4. From the pick-list of Printers, choose the **pdfFactory** driver.



5. Select **OK**.
When you select **OK**, the PDF driver should be displayed on the screen as in the above picture.

The current PC is now set up to use the pdfFactory driver.

IMPORTANT!

If you should ever change your printers on any PC, you must configure SoEasy to work with the new printer by following the above procedure.

It is also a good idea to remove any printer drivers from your PC that you no longer use.

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Emailing Documents

To email a document from Word or Excel

When in Word or Excel, select the **File - Print** menu options, and at the next dialog choose the **pdfFactory** printer driver.

See section below on sending the PDF to an email address.

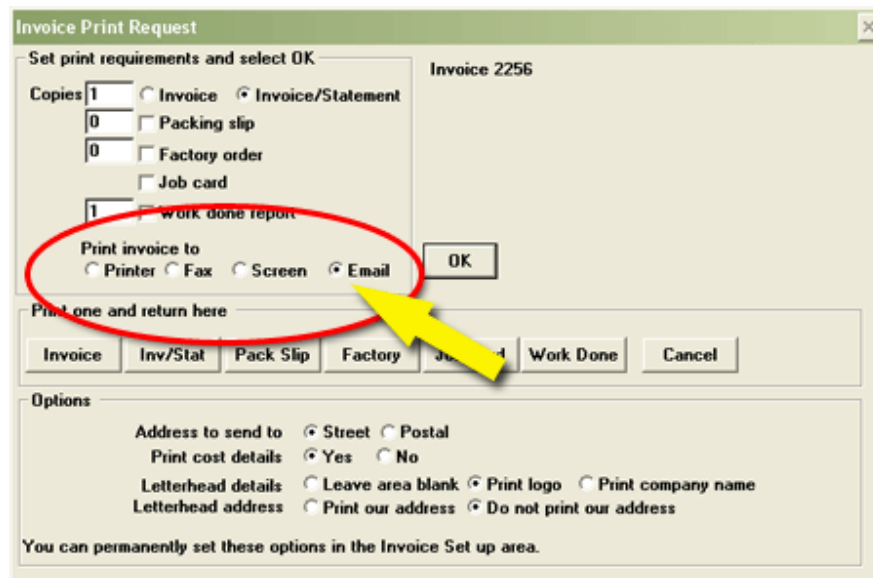
To email a SoEasy document

Note:

The PDF driver must be installed on to the PC and set up in **The Front Company menu – Printers** setting as in the instructions above.

Email option is available as follows:

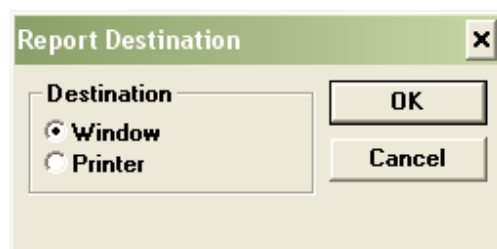
If a document can be emailed, there will either be an option in the print dialog box;



Or a message will ask if you would like to print or email the document.

Printer or Window option

Sometimes you will also be asked if you would like the document to go to the **Window** or **Printer**.



If you want it to print, choose the **Printer**.

If you choose the **Window**, and you have the latest runtime system of SoEasy (2009 version), you can view the report and then select that you would like to print.

This feature is only available in the latest runtime system of SoEasy.

1. Select the printer icon

2. Select which printer you want to print the report on

Description	Qty	Sup	Unit Cost	
Body	1		2000.00	
Bumper	2		200.00	
Door	2		400.00	
Meter	1		2000.00	
Meter Fitting Cost	1		1600.00	1,600.00
Fal Light	4		20.00	80.00
Vehicle upholstery, seats, carpet +	1		3000.00	3,000.00
Wheels x 4 including tyres	1		1600.00	1,600.00

When you send a report to the pdfFactory printer, the document will either pop up on the screen or be hiding on the Status Bar.

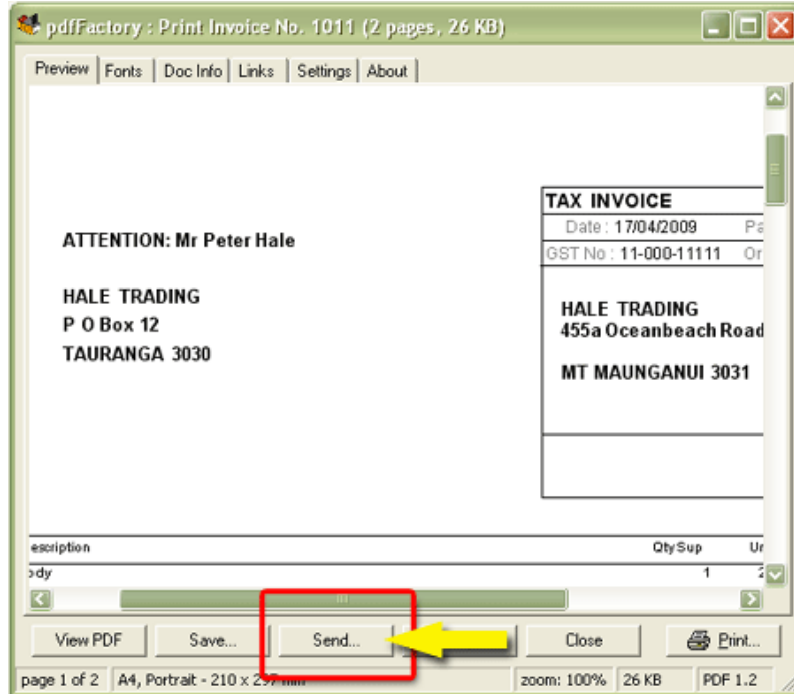
If it is on the Status Bar, select it with your mouse.

PDF document on the Status bar

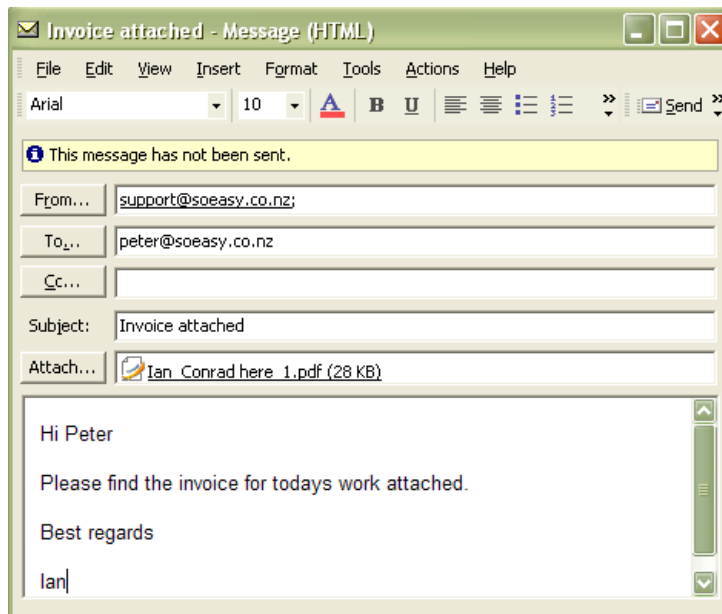


How to ‘Send’ the document

When the pdfFactory window appears you can select the **Send** button.



This should automatically create an email where you just need to type in the recipient's email address, subject, and a message.



Hint: When emailing invoices from SoEasy; if you have the client's email address entered into SoEasy's database, in the **To** section right-click your mouse and select paste.

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Advanced Emailing

There is an additional SoEasy module called the **Email Manager Module**.

This module provides three very important features:

Quotes, Invoices and Credit Notes can automatically be packaged to clients and sent directly to them. The process is extremely quick and provides for faster delivery of account information and has the potential to increase cash flow and reduce accounts.

Advanced Debtor Account management where the Email Manager will automatically send customers and email message to customers who have not paid their account on time.

Direct Email Marketing where you can send an email message to a selection of contacts within just a few minutes. This could form part of your marketing plan and provides a very efficient means of sending Newsletters.

The module can be purchased by selecting the link at **Platform – Set up – Email Module**.

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Frequently Asked Questions

My SoEasy won't email documents

1. Check that the PDF printer driver is installed.
2. Check that it is set up in **The Front Company Menu, Printer Settings** area by re-selecting the PDF printer driver.
3. Check that you did select the document was to go to the email option.
4. Check that your email program is working (see additional notes below).

If you have checked all these areas and the document is still not emailing, please book a support service. Normal fees will apply when you [book a service](#)

I have other documents in the email package that I don't want

If you do not dispatch the pdf documents, pdfFactory will just keep adding to the pdf file each time you print a document to the email. This is actually a good feature because you can compile a variety of reports into one pdf package and then send them.

However, if you want to delete a page:

- Right-click your mouse on the pdfFactory document
- a drop-down list will enable you to delete the page

I want to send a variety of documents to one customer

When you create a PDF document using pdfFactory, if you leave the PDF document open, the next PDF you create will automatically be added to the currently open pdf document.

This way you can compile all documents to go to the one customer and when ready, send the one document.

Warning: Make sure to keep file sizes down to a manageable size. The recommended maximum file size is 2 MB.

My pdfFactory documents have a promotional message about pdfFactory. How do I get rid of it?

SoEasy installs only the trial version of pdfFactory.

If you want the full version, which does not have the promotion, purchase the full copy from www.fineprint.com

My pdfFactory crashes

Uninstall the driver and re-install it.

Other Questions

All other questions about pdfFactory should be referred to www.fineprint.com

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