**v4.0.15.97 Nov 2014**

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# PDF-eXPLODE V4 User Guide

2014

# Table of Contents

# VERSION 4
**v4.0.15.97 Nov 2014**
**Electronic document delivery has never been so easy!**

This version is the culmination of 3 years of research and development into better and more efficient ways of delivering your documents. The product has been completely overhauled with all new engines that create a PDF, explode or burst the 'master' PDF document into multiple pages for delivery by e-mail, Fax, SharePoint or FTP (to come soon).

**Overview**

PDF-eXPLODE automates the document delivery process for businesses. It turns paper and electronic documents into secure e-mails that can be batch-sent to business clients, customers, patients, employees, vendors, investors and others saving time and money. PDF-eXPLODE is perfect for sending invoices, statements, form letters and other reports and correspondence.

At the heart of PDF-eXPLODE is the ability to explode, or separate, a PDF file into individual PDF files. This enables you, for example, to select and combine different portions of a document into a resulting PDF file, or to e-mail different people different sections of a document. The current version of PDF-eXPLODE incorporates an exploding engine that is capable of 2 distinct methods of exploding a document into multiple PDFs for distribution. The 2 methods of exploding are as follows:

- Only pages containing a TAG will be exploded or
- Blank TAG pages are exploded using the previous Tag page

To be able to "explode" individual pages of any PDF file, you must be able to modify your business report template (invoice, paystub, vendor payment, etc.) in order to include a "tag". This "tag" is a collection of business data set out in a specific order and formatted to a set of rules which you configure in the PDF-eXPLODE options screen. Each page to be "exploded" must contain a tag. The tag is generally located in the page header (so it appears on all pages by default) and may be hidden using a small sized white colored font. Tags can be a basic email address or enhanced to be able to customize the exploded file name, archive folder, password security, email message and a lot more.

A tag has the following layout, shown below in order of priority:

**<pdfexplode> or {pdfexplode} or [pdfexplode] --> referred to as a 'left' or 'open' node**

**Variable** - Up to 9 Variables separated by commas and ending with a '%' like this Var1, Var2, Var3, Var4, Var5, Var6, Var7, Var8, Var9% where 'Var' is a value that will be replaced by a database value when the report runs. Each value can be used for a specific purpose like filename, folder or even email subject or message.
**Message ID** - A Message ID is our name for a Report or Job stream (or type). It is a one-word text with no spaces and must be terminated (in the document tag) with a '#' like Paystubs# or Invoices# or Statements#
**Email** Address(es) - show a database email field here so that this value will change with each new document page. You can have more than one email address separated by either a comma or semi-colon.

**</pdfexplode> or {/pdfexplode} or [/pdfexplode] --> referred to as a 'right' or 'close' node**

This is what it would look like in a document tag:

**<pdfexplode>**variables%messageID#**e-mails</pdfexplode>**

Each part is optional. You must have at least one or more of Variables, Message ID or email addresses. **If you have nothing between the open and close nodes, then PDF-eXPLODE will convert that page to a 'blanktag.pdf'.**

Here is an example of a very basic tag, using just the Email Address part:

**<pdfexplode>**mail@3000ad.com.au**</pdfexplode**>

This tag consists of an email address destination for the page (e.g: mail@3000ad.com.au), contained between a pair of front/back tag identifier nodes (<pdfexplode> </pdfexplode>) . You can review all of the tag format rules **here**. You also view a video tutorial on setting up a tag. Just follow this link: **Tag Rules**

In PDF-eXPLODE you can choose between the following options:

- Archive and E-mail each PDF if an e-mail address exists in the tag [default] or
- Archive only each of the exploded PDF to a folder on your server or

- Print the exploded PDF and Archive or
- Combine the functionality of Print, Email and Archive in a variety of ways based on your report page tag configuration.

You can also configure PDF-eXPLODE to either:

- Send one email with one exploded PDF attached or
- Group by email destination and send multiple PDFs attached or
- Do not attach any exploded PDFs to the email

You can also attach one or more additional PDFs or other file types (e.g. XLS, Doc) to the email. These are referred to as "Coversheets". You simply configure this in the Option screen.

When emailing reports, you have the choice of using an in-built PDF-eXPLODE SMTP email sending client or use your existing MS Outlook email client. To configure PDF-eXPLODE business rules to match the tag within your document/report you must open the PDF-eXPLODE application using the desktop shortcut, then select Options from the PRINTER menu item. Sending emails using MS Outlook will allow you to send emails to a Contacts Group (aka Distribution List) also. You just need to have appropriate MS Exchange permissions to access the Group email list. Ask your MS Exchange Administrator.

PDF-eXPLODE provides the ability to setup different job streams or processes - this is done by assigning your various job types to one or more Message ID. Each Message ID has a number of configurable components, not least of all is the FROM, REPLY TO, CC, BCC, Subject and Message content for the email. Additionally, you can archive each Message ID's exploded files to different paths. There are plenty of additional configuration possibilities. Examples of Message ID (or Job types) is Invoices, Statements, etc.

Within a Message ID run, if you wish to create an exception for a specific Client (or email address destination) for the message content of a Message ID and say the exploded file path, you can set up a Client ID with a different message content and different archived exploded path. The Client ID would typically be an email address that would appear in the Tag for a particular Message ID.

For example:
Configure a Message ID "Invoices" to process weekly Invoice batch runs. Email subject: "Your Invoice is attached", Email message: "Attached is your weekly invoice"
In your document the tag would be:
<pdfexplode>Invoices#mail@3000ad.com.au</pdfexplode> and another <pdfexplode>Invoices#info@pdf-explode.com</pdfexplode>
Now Create a Client ID called 'mail@3000ad.com.au' and under that Client create a Message ID called "Invoices". For: Email subject: "Your Invoice is attached", Email message: "Attached please find your weekly invoice. From next week your account will be billed once monthly."

Result: when you process the weekly Invoices batch, the client: mail@3000ad.com.au will receive a different email message to other email recipients in the batch.

Finally, PDF-eXPLODE provides you with 2 basic types of email message format. You can either send your email message as:

- Plain text which has no specific text font formatting nor any graphic display capability OR
- HTML - which is a web based language capable of formatting text with different font styles and colors as well as inserting graphics like logos, etc.

PDF-eXPLODE has a simple to use HTML editor capable of most text font formatting as well as embedding graphics from your hard drive so that they can be displayed on the email recipient's computer when the email is opened. You can view a tutorial on how to use the HTML editor at www.pdf-explode.com/HTML Editor

PDF-eXPLODE has a number of ways of creating customised exploded filenames and folders for archiving (saving) the files. You can create nested folders structure; for instance, you could create a nested folder based on the Salesman, Client Name and Month of Invoice or Statement like - Salesman\Client\Month under a parent path which you nominate in the PDF-eXPLODE configuration and insert your exploded PDF file at any level of this folder tree. Filename can be created as [Invoice_Number].PDF where [Invoice_number] is a data field value passed to your report. The filename could also be a prefix or suffix to another name.

"Variables" are a concept of passing data values from your database to PDF-eXPLODE for use in Filenames, Folders, passwords, or even for use in the e-mail Subject or Message. You have up to 9 Variables that can be inserted into the 'Tag' in your report.

PDF-eXPLODE provides you with a lot of flexibility and configurability to meet most business delivery requirements. It is the ideal middleware tool to seamlessly work with renowned report writers like Crystal Reports, Cognos, MS Access, SQL Server Reporting Services or most business Front Office or Back Office software. It currently has in excess of 1000 Users spread over 26 Countries and many industries, large and small. It is inexpensively priced and 6 days-a-week support is readily available.

**PDF-eXPLODE**

**Getting Help**

We want you to succeed with PDF-eXPLODE. If at any time you need assistance using PDF-eXPLODE, please take advantage of any of the following resources:

- Check our Online Knowledgebase for quick answers to common problems.
- If you don't find your answer in the Online Knowledgebase, contact us for support under one of the following plans: You have 60 days of free priority support from the date of purchase. If you are located in United States, then e-mail info@pdf-explode.com otherwise support@3000ad.com.au with your questions and we'll respond ASAP, guaranteed within one business day.
- To continue to have access to priority support after the 60-day period, you must purchase a 12-month support plan. A priority support plan can be purchased here .
- We also offer per-incident support. You can purchase this 'per-incident' support by clicking here .

**System Requirements**

- Operating System: Microsoft Windows XP, Windows Server 2003, Windows Server 2008, Windows Vista or Windows 7
- Hard Drive: Minimum 52.5MB of free disk space, plus additional space for PDF files created
- RAM: At least 64MB of available memory, more during PDF creation. The size of the PDF that can be created is limited by the amount of available memory.

**Before Getting Started**

Please note the following configuration items before getting started:

- **Immediately after installation:** Configure the PC according to the instructions in the PDF file titled **Configuring Desktop or Server PDF-eXPLODE Versions after Install** that was supplied with the software. If you have any questions, please contact support@3000ad.com.au before proceeding. Failure to follow these instructions can result in the program failing to work properly.
- **If you are using PDF-eXPLODE Server:** There are special considerations and configuration settings when using PDF-eXPLODE in a shared environment such as Terminal Services, Citrix, BusinessObjects, Crystal Reports Server, SQL Server Reporting Services or as a network shared printer. These are discussed in the topic on Multi-user Administration.

  **If you are upgrading from a previous version of PDF-eXPLODE**: You must start PDF-eXPLODE.

  - On the Printer menu, click PDF-eXPLODE Options....
  - Once the Options screen opens, you must navigate through each menu item and verify the settings are correct. If not, then adjust them.
  - Ensure each Message ID and/or Client ID is correct
  - Click Save to save your settings and exit.

- **If you want to purchase a license online:** Purchase this software online.
- **If you already purchased a license and want to activate it online:** Activate online License ID.

**Getting Started**

If you are eager to send your first PDF-eXPLODE e-mail within the next few minutes, follow the Fast Start Guide and then come back to the tutorials below to learn more when time permits. If you prefer to read a technical overview of PDF-eXPLODE before getting started, see the section below.

- Fast Start Guide

If you are new to PDF-eXPLODE, please follow the Getting Started Tutorials to quickly learn how to use PDF-eXPLODE and achieve the results you desire. Each tutorial will take approximately 10 minutes.

**Tutorials**

- Create a PDF File
- Explode a PDF File
- E-mail a PDF File
- Automate the Process

If you are currently using PDF-eXPLODE Version 1, Version 2 or Version 3 and are upgrading to Version 4, the following topics describe the new features.

- What's New in Version 2
- What's New in Version 3
- What's New in Version 4

**Technical Overview**

PDF-eXPLODE software comprises two programs, a Setup Program and a Windows Printer.

▶ PDF-eXPLODE Application Program

The PDF-eXPLODE Application Program (PDF-eXPLODE.EXE) is used to:

- **configure PDF-eXPLODE** settings including General settings for the program's operation, Mail settings for creating and sending e-mails, Security settings for applying passwords to PDF files, and Message and Client settings for customizing e-mails for specific types of documents or specific recipients.
- **process documents** according to the configured rules by creating a Master PDF of the document, then exploding, securing, e-mailing this master and finally archiving this master and exploded PDFs to your nominated folder path.

Some configuration settings are required while others are optional.  All settings are stored in an 'INI' file, the location of which is described on the help topic What's Installed Where. If you are going to be using PDF-eXPLODE on a network shared computer (e.g. server), please review Multi-user Administration for important information.

The PDF-eXPLODE Application Program may be accessed from the **PDF-eXPLODE** folder available under **Programs** on the Windows **Start** menu, or by clicking the shortcut optionally installed on your Windows desktop

▶ PDF-eXPLODE Windows Printer

The PDF-eXPLODE **Windows Printer** program emulates a physical printer. It creates report output in a format suitable to convert to PDF. This output is created from your business application when you select **Print** from the **File** menu. Printer output is sent to the Application program where it is converted into a PDF file, which in turn may be exploded into separate PDF files based on specially formatted tags located within the document.

PDF files are saved in a specified folder with the name specified by the tag, and are then optionally e-mailed as a file attachment with a specified e-mail subject and message. E-mail settings come from a configuration file created and maintained by the Setup Program described above.

The PDF-eXPLODE Windows Printer may be accessed from the **Printers and Faxes** folder available under **Settings** on the Windows **Start** menu. To confirm the PDF-eXPLODE printer is working properly, right-click **PDFeXPLODE**, select **Printer Properties** (or **Properties** if your version of Windows does not have **Printer Properties**) and click **Print Test Page**. A PDF file containing the Windows printer test page will be created in the Default Document Path.

You can optionally use a third party software to create a (master) PDF containing the PDF-eXPLODE tags and use either the "Command Line" or "Drag and Drop" processing functionality to skip the PDF creation and just explode, e-mail and archive only.

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*In this graphic below, 3 Users (work stations) are connected to the Server PC via the shared PDFeXPLODE Printer on the Server*
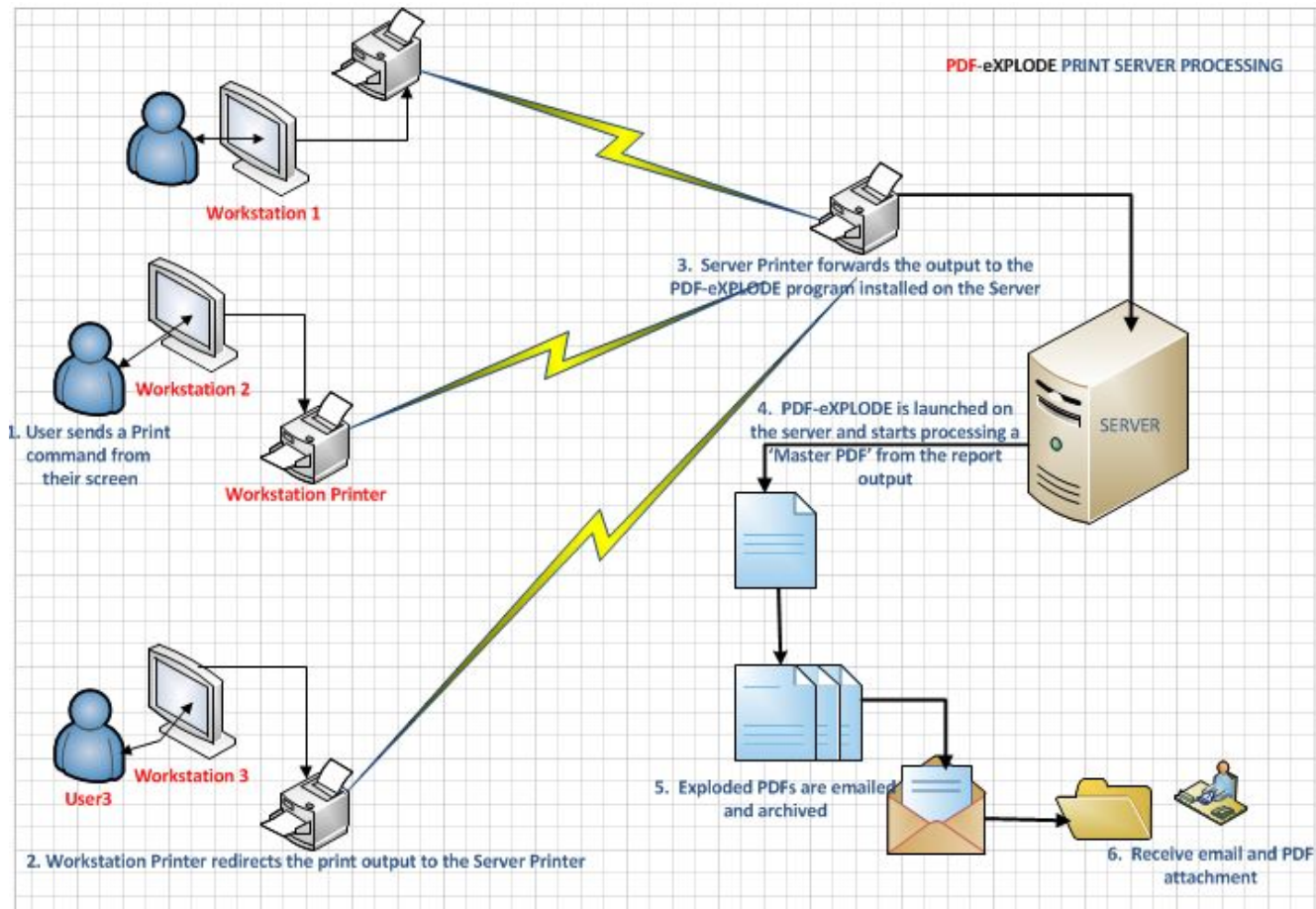
*In this graphic below, the single User is connected to his/her PDFeXPLODE Printer on their own PC.*
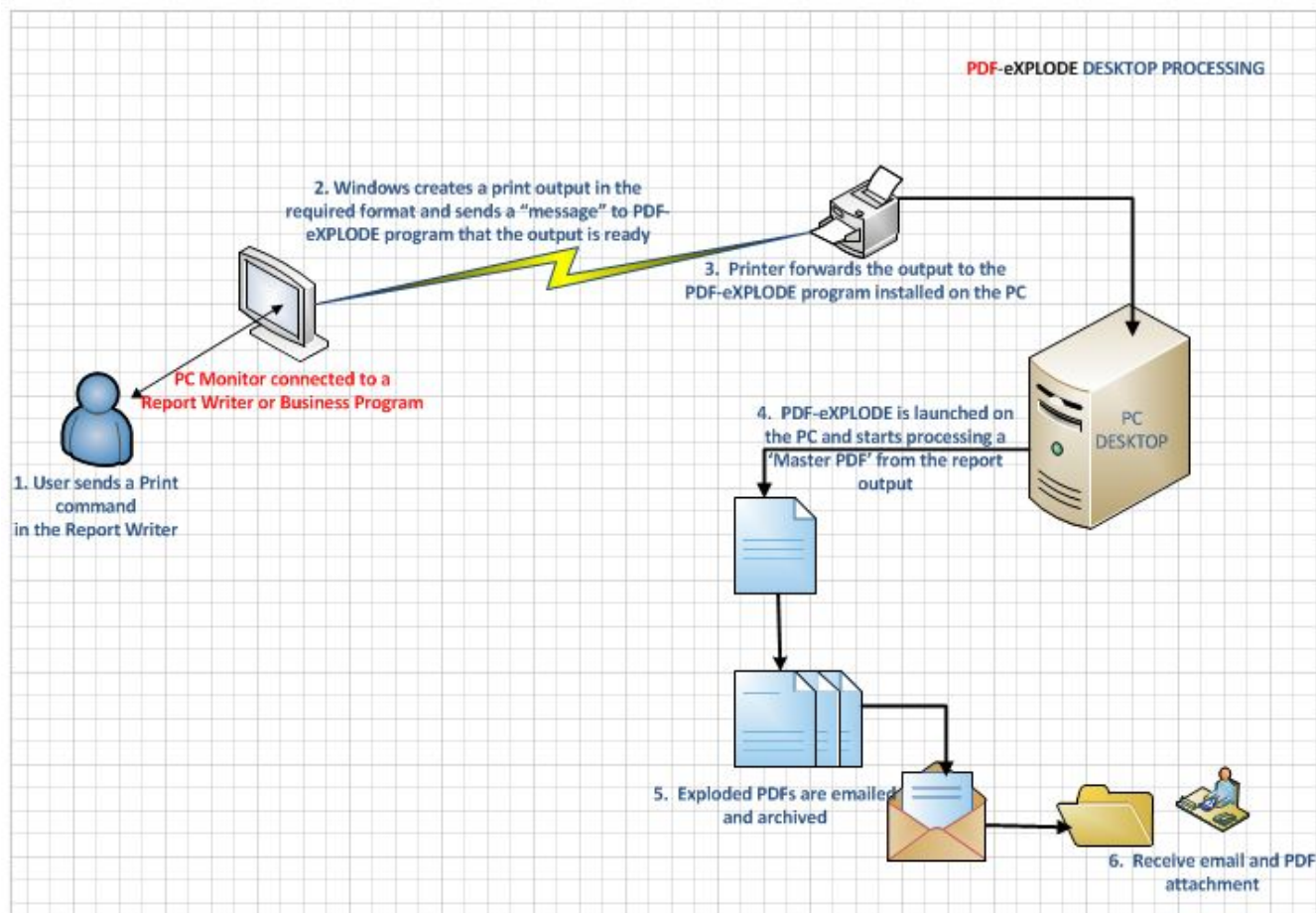


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- on a standalone PC or network work station by any number of end-users using the computer locally

    - or -

- on a network server or network shared computer by a single end-user or terminal.

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- Client-Server Network (e.g. Microsoft Windows Network)
- Peer-to-Peer Network (e.g. Windows shared printer)

The Software Product must not be used in any network unless multiple Licenses are purchased reflecting the actual number of separate end users or terminals (whichever is the larger) accessing the Software Product on the network.

## About PDF-eXPLODE

PDF-eXPLODE works on the principal of a Post Office which receives incoming mail for sorting and then redistributes it in the fastest and most efficient way. It is your very own Post Office right on your Desktop!

# General Overview

PDF-eXPLODE makes it faster, easier and less expensive to distribute business documents to your business clients. You can send invoices, statements and other reports and correspondence. It is designed to get the right information to the right people at the right time, improving customer service, accelerating cash flow and reducing costs.

Instead of manually printing, collating, stamping and distributing stacks of mail, printing to PDF-eXPLODE can automatically e-mail batches of individualized documents with a single mouse click.  Clicking the printer button in a report writer, word processor or a mail-merge application activates PDF-eXPLODE.  PDF-eXPLODE explodes, or splits, a document into individualized PDFs, which it then e-mails securely and reliably to your business clients.

PDF-eXPLODE  is easy to set up and use because it works with the programs you already know, like Crystal Reports, Microsoft Access and Microsoft Word, as well as with most packaged software applications designed for managing your business.

There are many ways to use PDF-eXPLODE - here are some of the ways people use it:

- Send e-mails with one consolidated PDF attachment
- Send e-mails with multiple PDF attachments
- Send e-mails with no PDF attachments
- Send e-mails using mail-merge capabilities to personalize the e-mail message
- Send e-mails that include a cover document such as a newsletter or promotion
- Print documents when the e-mail address is missing
- Split a PDF into separate files for archiving or uploading to a web site or FTP site
- Convert any document to PDF format

# How PDF-eXPLODE Works

PDF-eXPLODE has two distinct methods of operation. It can:

- start its **processing when you click PRIN**T (to the installed PDFeXPLODE printer) in your business software or
- start **processing using a third party produced PD**F.

Broadly, PDF-eXPLODE functions as a Windows printer, so the document delivery process can start with the click of a printer button.
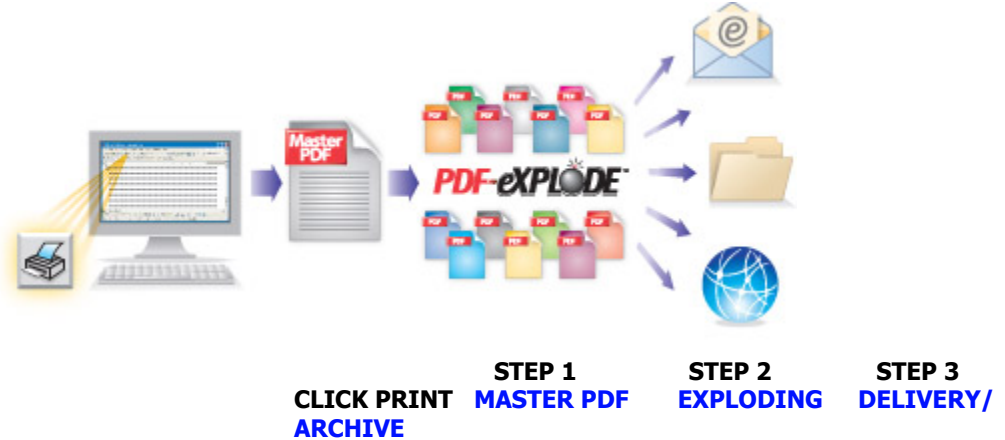


|              | STEP 1       | STEP 2       | STEP 3       |
|--------------|--------------|--------------|--------------|
| CLICK PRINT  | MASTER PDF   | EXPLODING    | DELIVERY/    |
| ARCHIVE      |              |              |              |

PDF-eXPLODE then runs through a series of three steps to create and distribute targeted emails. It:

1. Takes a report or a word or mail merge document and, instead of printing it, converts it to a master PDF document;
2. "Explodes," or splits, the master PDF into individual PDF attachments based on e-mail tags in the original document; and
3. Distributes each individual PDF either via e-mail, your local area network or FTP (available soon) to the designated recipients or locations.

In the graphic above, by using a third party created PDF, processing can start from Step 2 "Exploding" and continue to emailing and archiving. The advantage of this method allows you to continue to use your favorite PDF creation engine which may be faster and produce more compact PDFs. Aside from this, there is a gain in speed in completing the process.

# Benefits of PDF

PDF-eXPLODE generates Adobe PDF (Portable Document Format) files from virtually any Windows application capable of printing. Adobe PDF is readable across all major computing platforms, making your documents accessible to anyone using free Adobe Reader® software. There are many benefits to using the PDF format to distribute your documents:

- Preserve the appearance of your documents so that the electronic and paper versions look identical.
- Protect the integrity of your documents by making them non-editable.
- Make it easy to copy and paste information from your documents into other office productivity applications.
- Add security to restrict access and prevent copying and pasting information from your documents.
- Compress your documents for more efficient delivery and storage.
- Take advantage of industry-wide support for Adobe PDF.

# Example Applications

## Invoices

PDF-eXPLODE is used by a manufacturing company who prides itself on providing exceptional customer service. Part of the company strategy is to offer customers the option to receive automated e-mails containing order acknowledgments, shipping memos and invoices. These reports are sent daily. This function used to be performed manually. A staff member would print all the order acknowledgments, shipping memos and invoices each day and mail or fax each one to each customer. It was an expensive and labor-intensive process, and was subject to error, staff availability and time constraints.

PDF-eXPLODE is now used in combination with R&R Report Writer and Windows Scheduled Tasks to automatically send the requested reports each night, ensuring that customers receive timely and accurate information about their orders.

To distribute the invoices, the database field containing the recipient's e-mail address was inserted into the page header – in white so it's invisible on the final communication. The report was set to print to the printer named "PDF-eXPLODE." From there, the process is automated. When the report is printed, PDF-eXPLODE stores the output (all invoices) in a PDF file and then sends each invoice to the correct customer.

## Statements

PDF-eXPLODE is used by a laser toner cartridge recycling company who is driving up profitability by speeding up cash flow and freeing up staff to work on revenue generation activities. Producing and delivering monthly statements used to be performed manually by a staff member who would print more than one thousand monthly statements and a cover letter, spending hours collating the documents and stuffing envelopes, applying labels and finally mailing them, sometimes as long as six weeks following the end of the month.

PDF-eXPLODE is now used in combination with Crystal Reports to automatically send the monthly statements on the first day of each month for the prior month, ensuring that customers receive timely and accurate information about their accounts.

To distribute the statements, a form letter was written in Crystal Reports, and the statement was inserted as a sub-report. The database field containing the customer's e-mail address was inserted in the page header with the color set to white to hide it on the finished document. By printing to the printer named "PDF-eXPLODE", thousands of statements are sent out automatically, helping this company work more efficiently. In fact, the CFO has calculated that the company will save $700 each time the statements are sent by PDF-eXPLODE.

# Frequently Asked Questions

[You can get help on common processing and configuring problems in our Online Knowledgebase]

## What It Does

### ▶ What is PDF-eXPLODE?

PDF-eXPLODE is a one-click batch e-mail delivery tool that makes it easy and cost-effective for small businesses to get their customers the information they expect on time. Through a click of the printer button, PDF-eXPLODE converts a report or a Word document into batches of individual PDF attachments and securely and reliably e-mails them to the designated recipients. In addition, users can pre-schedule routine mailings for hands-free delivery.

### ▶ What Are the Key Benefits of PDF-eXPLODE?

PDF-eXPLODE is designed to strengthen your business relationships by getting the information people need into their hands when they expect it.  Whether sending daily confirmations, monthly statements, or other critical reports or correspondence, PDF-eXPLODE reduces costs and saves time by eliminating the labor-intensive process of hand-mailing or e-mailing each document separately.  PDF-eXPLODE helps reduce costs, save time, increase cash flow and enhance customer service.

### ▶ How Does It Save Time and Decrease Costs?

PDF-eXPLODE software improves productivity and costs by eliminating the need to send documents one-by-one, whether through the mail or by e-mail. It:

- Eliminates costly and inefficient paper-based workflows.
- Offers customers, partners and employees immediate access to the information they need.
- Pre-schedules routine and tedious mailings, freeing up staff to focus on revenue-generating activities.

It also adds value to your existing business systems. Most organizations already have made costly investments in software and equipment and can't afford new technologies that disrupt their current workflows. Thanks to its standards-based interface, PDF-eXPLODE software can work with any existing business application.

- As a printer driver, it easily installs onto existing Windows computers via the Printer Control Panel.
- It supports e-mail delivery of documents using SMTP (Simple Mail Transport Protocol) standards.
- It works with your existing business applications, including Crystal Reports, R&R Report Writer, Microsoft Word ( and Mail Merge Wizard), Microsoft Visual FoxPro, plus accounting and other software packages.

### ▶ How Does It Increase Customer Satisfaction and Retention?

PDF-eXPLODE enables you to create focused, targeted documents, so you can treat your customers and partners as individuals, leaving them both satisfied and loyal. It:

- Customizes documents, such as financial statements and marketing brochures, for specific individuals or even departments and workgroups â€" sending them only the information they want and need.
- Allows you to send communications whenever you want for no additional cost so you can be responsive to your customers' needs.
- Combines multiple documents to the same recipient in a single PDF.
- Ensures that dynamically generated documents, including business reports and sales letters, are highly legible and consistently branded.
- Includes visually rich charts and graphs tailored to specific documents.
- Enhances your document delivery with targeted e-mail messages.

### ▶ Who Benefits from PDF-eXPLODE?

Everyone you do business with will benefit from PDF-eXPLODE. Communication is central to the success of a business, and customers expect and demand regular, consistent communication. PDF-eXPLODE makes it easy and affordable to get the right information into the right hands at the right time. That means customers as well as business partners and your employees will remain well informed and, subsequently, confident about and satisfied with how you do business.

PDF-eXPLODE helps companies communicate reliably, efficiently and regularly not only with their customers and outside vendors but also with and among departments. PDF-eXPLODE allows departments as well as workgroups purchasing, operations and accounting, for example to simultaneously receive business-critical reports, so they can continue to coordinate to keep the business running smoothly and efficiently.

*PDF-eXPLODE*

## ▶ What Are Its Business Applications?

PDF-eXPLODE can be used in virtually any business and by any department that sends bulk individualized communications â€" whether to customers, employees, vendors or prospects.

Below is a sampling of the most popular uses for PDF-eXPLODE.

Manufacturing/Shipping and Fulfillment

- Order confirmations
- Shipping memos

Accounting and Finance

- Invoices
- Account statements
- Contracts
- Purchasing orders
- Dunning letters
- Internal budget status reports

Human Resources Departments

- Benefits statements
- Open enrollment forms

Sales and Marketing

- Targeted sales letters
- Promotional mailings
- Thank you notes
- Re-order solicitations
- Internal lead status reports
- Regional sales reports

Professional Services

- Billing statements
- Appointment confirmations
- Reminders to schedule appointment

Financial Service Providers

- Monthly, quarterly, year-end statements
- Trade confirmations
- Portfolio management and reviews

## ▶ How Is PDF-eXPLODE Different from Other Document Distribution Tools?

PDF-eXPLODE is an all-in-one document delivery tool that allows you to both create individual PDFs and e-mail them in batches with a click of your printer button.

## ▶ What Are the Key Features of PDF-eXPLODE?

Easy Use and Set-up:  PDF-eXPLODE can be used with both text documents and data-driven reports, seamlessly fitting into business workflows. PDF-eXPLODE works with most business applications, including Crystal Reports, R&R Report Writer, Microsoft Access and Microsoft Word (Mail Merge Wizard), Microsoft Visual FoxPro, and accounting and other software packages. As a printer driver, it installs onto any Windows computer via the Printer Control Panel.

Automatic and Manual Process Settings:  PDF-eXPLODE can be set in silent mode to run without intervention when a document is printed, whether whether from within an application by clicking the printer button or from a task scheduler for true hands-free processing. Or it can be set to run manually for full control to set options at any time, displaying interactive pop-up instructions that users respond to every step of the way.

Standard and Customized E-mail Messages:  PDF-eXPLODE defaults to a general e-mail subject and message to make e-mail deliveries as easy and hands-free as possible. For enhanced customer service, it allows customization of e-mail subjects and messages for each individual PDF attachment. In addition, users can crate and name pre-scripted e-mail messages - such as "Invoice" or "Monthly Statement" - to sent to all recipients of a similar type of document to easily manage report distribution to multiple customers.

Multiple Delivery Modes : PDF-eXPLODE can distribute individual PDF attachments through a number of communications channels. In addition to sending through e-mail, it can send documents to shared network folders for employees to view. In the near future, PDF-eXPLODE will have the capability to send PDF documents to FTP sites for Web publishing.

Streamlined Mailings Management and Archiving:  PDF-eXPLODE has a number of features for managing mailings. It logs each task performed for job verification so users can review the results of each e-mail and correct any errors. It also saves a copy of each PDF attachment for archiving.

Professional Benefits of PDF Format:  PDF-eXPLODE leverages the features and benefits of Adobe PDF. In addition to making documents accessible to anyone using free Adobe Reader software, it preserves the professional appearance of original documents so the electronic and paper versions look identical. It protects the integrity of documents by making them non-editable. It also offers efficiency, making it easy to copy and paste information from documents into other office productivity applications.

Secure Sending:  PDF-eXPLODE has a number of security features that protect the integrity of documents, including the ability to select whether a recipient can edit the PDF document. In addition, it allows users to password-protects files to further secure their communications.

Efficient Operations:  PDF-eXPLODE efficiently sends documents directly through a mail server (SMTP) instead of using an e-mail client, such as Outlook or Notes. This feature avoids having to manually confirm pop-up security-block messages. It also provides a choice of e-mail From: address, so e-mails can be sent from any address. It also compresses documents for more efficient delivery and storage.

Bonus PDF Creation â€" While the main purpose of PDF-eXPLODE is to create and distribute batches of PDF documents, it can turn any individual document, such as an Excel spreadsheet, into a PDF without sending.

## How It Works
▶ How Does PDF-eXPLODE Work?
PDF-eXPLODE functions as a Windows printer, so the document delivery process starts with the click of a printer button.



PDF-eXPLODE then runs through a series of three steps to create and distribute targeted e-mails. It:
1. Takes a report or a word or mail merge document and, instead of printing it, converts it to a master PDF document;
2. "Explodes" or splits, the master PDF into individual PDF attachments based on hidden e-mail tags in the original document; and
3. Distributes each individual PDF either via e-mail, your local area network or FTP (available soon) to the designated recipients.

▶ **What Are the System Requirements for PDF-eXPLODE?**
PDF-eXPLODE is ideally suited to work with any application that merges data from a database with a template, including Crystal Reports, R&R Report Writer, Microsoft Access, Microsoft Word (Mail Merge Wizard), Microsoft Visual FoxPro and other "report writer" software, either built-in to your business applications or used as a separate add-on to your business databases.   You also may use PDF-eXPLODE with any Windows application that is capable of printing if you wish to e-mail all or portions of the document or if you simply want to convert a document to PDF format.
### System Requirements

- Operating System: Microsoft Windows XP,Win Vista, Win 7, Win 2003, Win 2008 R2
- Hard Drive: Minimum 34MB of hard disk space
- RAM: At least 16MB of free RAM

▶ **Will PDF-eXPLODE Combine Documents Going to the Same Recipient?**
Yes. PDF-eXPLODE merges all the documents tagged, or addressed, to the same recipient into one PDF attachment, which it then e-mails.
Can I Send a Document to More than One Recipient?
Yes. PDF-eXPLODE lets you send a single document to as many recipients as you like. This feature is helpful to keep everyone in the loop.

## Can I Customize the e-mail Messages for Each PDF Attachment?

Yes. You can create and send a specific e-mail message with a specific PDF attachment. This is done by creating and saving a subject/ message in a client folder and then "tagging" the original document with specific file name of the subject/message. You may also create a mail merge using variables in the e-mail subject and message.

## Can I Manually Go Through the Delivery Process Step-by-Step?

Yes. PDF-eXPLODE can run manually so that you have full control to set options for a mailing at any time. Instead of running automatically in Silent Mode, PDF-eXPLODE will display interactive pop-up instructions that you respond to every step of the way. Using Silent Mode is a great way to automate the process to run in the background while you work on other tasks or to run according to a schedule. PDF-eXPLODE reads hidden tag# in the original document to know where to send the attachment and what message to include in the e-mail. These tags include a recipient identifier which is usually an e-mail address and a message identifier. If a message identifier is not included, the e-mail attachment is automatically sent with the default message you indicated when you initially set up PDF-eXPLODE.

## How Do I Tag a Document?

You insert a "tag" on each page of the document that you want to be processed by PDF-eXPLODE. Typically, the tag is placed on the first line in the page header. For a complete description and examples of of PDF-eXPLODE tags refer to the help topic PDF-eXPLODE Tag. Below is a summary of rules concerning tags:

- A tag must adhere to the following general format:<pdfexplode>variables%Message IDentifier#clientIdentifier</pdfexplode>
- All tags must start with <pdfexplode> and end with </pdfexplode>.
- Open and close tags must match one another in case (i.e. uppercase, lowercase or mixed case).
- All tags must always include a client identifier, which may be an e-mail address or a filename.
- You may optionally specify multiple e-mail addresses separated with a comma (,) or semicolon (;).
- An optional message identifier, if used, must precede the client identifier and be followed by a pound sign (#).
- You may optionally precede the message identifier, if used, or client identifier with up to five variables followed by a percent sign (%).  Variables must be separated with a comma (,).

## How Does PDF-eXPLODE Know Where to Send a Document and What Message Should be Sent?

- Tags must be formatted with the Arial font, and the color may be set to White to hide the tag.
- All tags must fit entirely on one line. Reduce the font size if necessary to fit on one line.
- You may include multiple tags per page.

## Does Tagging a Document differ depending on the Business Application?

Yes - the steps you follow to insert a PDF-eXPLODE tag depends on the application in which you are working.

- Tagging a Microsoft Access Document
- Tagging a Microsoft Word Document
- Tagging a Microsoft Word Mail Merge Document
- Tagging a Crystal Report
- Tagging an R&R Report

## How Do I Know If a Document Has Been Sent?

You can check on whether a document has been sent one of two ways.

1. You can view the Log File, which records and displays each action, so you can see if all documents were sent and which ones, if any, had sending errors.
2. You also can look in the e-mail inbox for your e-mail return address (i.e., Sender Name) account for delivery errors returned by the intended recipient's e-mail server.

## How Do I Specify the Location Where PDF Archive Files are Saved?

- The default file name is the client identifier in the <pdfexplode> tag and the default folder is specified in General Settings.
- The default file name and folder may be overridden for a specific document type, using the Exploded File Name option on a Default Message ID Tag screen, for a specific recipient on a Client Details screen or for a client-specific document on a Client-specific Message ID Tag screen.
- The file name and folder may be further customized from within the application printing to PDF-eXPLODE using variables. This feature allows report writers to conditionally specify the file and folder names.

▶ **Can I print a PDF from the command line?**

- Yes - For example, you may need to either print or e-mail Invoices. You could create two PDF-eXPLODE Default Message IDs, **PrintMe** and **EmailMe**. In Crystal Reports (or another report writer) you could create a formula to compute the <pdfexplode> tag. The formula would be something like:

        If Trim({DB_Email_Addr}) = "" Then
          "<pdfexplode>PrintMe#</pdfexplode>"
        Else
          "<pdfexplode>EmailMe#" + {DB_Email_Addr} + "</pdfexplode>"
  The EmailMe message ID could specify the e-mail subject and message and the folder where the exploded PDF exploded files are saved.
  The PrintMe message ID could specify the printer on which to print the selected invoices.
  Another approach is to use use the **Program Processing** option on the Completed Processing Notification screen.

▶ **Can I perform a file clean-up operation after PDF-eXPLODE processing?**
Yes 3000AD SYSTEMS can provide a Cleanup.exe program on e-mail request (mail@3000ad.com.au with the Subject: Can I please get a copy of Cleanup.exe) which does a number of maintenance functions like copying, moving and deleting files and folders . This program can be configured to run once PDF-eXPLODE has completed its processing from the **Program Processing** option on the Completed Processing Notification screen.

## Trial and Purchase
▶ **How Is PDF-eXPLODE Licensed?**
See How Licensing Works.

▶ **Can I Get a Trial Copy of PDF-eXPLODE?**
Yes. You can download a 45-day free trial version.

▶ **How Can I Buy PDF-eXPLODE?**
After downloading and installing the 45-day trial version of PDF-eXPLODE, you can purchase a license by running the program and selecting Purchase this software online and clicking Continue to order through our secure website.

*PDF-eXPLODE*

# What's New in Version 2

This topic presents the new features of PDF-eXPLODE Version 2 to users already familiar with the features in Version 1.  Below is a summary of the new features with links to the help topics that describe each feature in more depth.

▶ **Windows Vista and Terminal Server**

- PDF-eXPLODE Version 2 is designed to work with Windows Vista, in addition to continuing support for Windows XP, Windows 2000 and Windows 2003.
- PDF-eXPLODE Version 2 is designed to work with Windows Terminal Server and Citrix Server.  You will need a PDF-eXPLODE Version 2 License for each PDF-eXPLODE  user (refer to Network Licensing). You no longer need to leave the server logged in on the Administrator account.

▶ **Variables**
Variables can be included in <pdfexplode> tags to:

- pass mail-merge fields into e-mail subjects and messages, for example to personalize a message with the recipient's name.
- name the exploded PDF files, for example embed an invoice number into a PDF file name for easier identification.
- name the folders in which PDF files are saved, for example use customer names to name the folders in which their PDF documents are archived.
- supply a user-specific password to secure each PDF file.
- provide the sender's e-mail address.

▶ **Quick Mail**
Quick Mail enables you to create a PDF file and send it as an e-mail attachment *without* placing a PDF-eXPLODE tag in the document.  This is handy for ad-hoc and one-off documents.

▶ **E-mail Options**

- You may use e-mail servers that require an encrypted connection using SSL or TSL encryption, such as Gmail.
- You may optionally format e-mail addresses to be sent through a fax server or to display the recipient's full name by selecting a default format in General Settings.

New e-mail options may be specified and applied selectively to e-mails

- **Read Notification** is defined in General Settings and applied to a specific Default Message ID Tag, Client Details or a Client-specific Message ID Tag.
- **Importance** and **Sensitivity** flags are defined in General Settings  and applied to a specific Default Message ID Tag, Client Details or a Client-specific Message ID Tag.
- **Sender E-mail** as defined in Mail Settings can be overridden on a specific Default Message ID Tag, Client Details or a Client-specific Message ID Tag.
- **BCC** e-mail addresses may now be defined for a Default Message ID Tag, Client Details or a Client-specific Message ID Tag.
- **Delay each E-mail** by a specified number of seconds to avoid errors that may occur on some e-mail (SMTP) servers.

▶ **Print**
You can now designate whether to print a PDF on each Default Message ID Tag, Client Details or a Client-specific Message ID Tag.

- **Print Only** might be used to print PDF files for only those clients that do not have an e-mail address.
- **Print Also** might be used to keep a hard copy of each PDF that is e-mailed.

▶ **Distribution Lists**
You can now send an e-mail to multiple recipients using a single <pdfexplode> tag in one of two ways:

- PDF-eXPLODE Tags may now include multiple e-mail addresses separated by comma (,).
- Client Details may now be named with *either* an e-mail address or any other desired identifier, for example the term "Managers" could be used and then the e-mail addresses of several managers could be entered into the CC field to ensure all managers receive the same PDF document.

**PDF-eXPLODE**

▶ **Other Conveniences**

- Global PDF Password: You may now secure all documents using the same password.
- Optional Timestamp: You may now include or exclude a timestamp on exploded and/or e-mail attachment PDF filenames. A timestamp may be useful when storing multiple versions of a document or it may be undesirable when sending and e-mail attachment.
- PDF File Backup and Viewing: You may now choose whether to keep backup copies of PDF files when newer versions are created. You may not want to keep backup files if you need to preserve disk space or want to prevent clutter. You can also view and print a PDF from within PDF-eXPLODE.
- Very Silent Mode: A new option allows you to suppress the dialogs displayed when using PDF-eXPLODE in silent mode. If you are running a large batch this will enable you to continue work in other applications without interference from the popup status dialogs.
- Job Completed Notification: You may request an e-mail alert whenever a job is completed. You may also run a batch process or executable file at the end of processing.
- Command Line Operation: The PDF-eXPLODE print queue window now closes after exploding a PDF when running PDF-eXPLODE from a command line.
- Cancel Document: You may now cancel documents waiting in the PDF-eXPLODE printer queue.

# What's New in Version 3

This topic presents the new features of PDF-eXPLODE Version 3 to users already familiar with the features in Versions 1 and 2.  Below is a summary of the new features with links to the help topics that describe each feature in more depth.

▶ **Server Editions Now Available**
Multiple users may share a single instance of PDF-eXPLODE on a PDF-eXPLODE server. Three different server configurations are supported - a different license is available for each configuration:

- **PDF-eXPLODE Terminal Server**: Licensed per concurrent user, this edition works on a Microsoft Terminal Servicer or a Citrix Server product.
- **PDF-eXPLODE Printer Server**: Licensed per concurrent user, this edition works on any computer with PDF-eXPLODE configured as a shared printer.
- **PDF-eXPLODE Report Server**: Licensed per server, this edition works on BusinessObjects Enterprise, Crystal Reports Server, SQL Server Reporting Services (SSRS) and other servers that run a report scheduler service.

▶ **HTML Format E-mail Messages**

- E-mail messages can be formatted using HTML, providing the ability to use fonts and styles, colors, headings, paragraphs, bulleted and number lists, hyperlinks and images. A built-in HTML editor is provided or you may use another HTML editor.

▶ **Send E-mail Using Outlook (MAPI)**

- E-mail may be sent through Microsoft Outlook (i.e. a MAPI client), rather than sending through an SMTP server.

▶ PDF-eXPLODE Tag Enhancements

- You can now include CC and BCC e-mail addresses within the <pdfexplode></pdfexplode> tag.

▶ **Variables Enhancements**

- You can now use a variable to provide the e-mail From address.
- The number of variables supported has been expanded to six to allow for the From address.
- You may now include commas within variable values such as in company names (e.g. **United Data Strategies, Inc.**) or in numbers (e.g. **$1,234**).

▶ **Cover Sheet Enhancements**

- A cover sheet may now be inserted either at the beginning or the end of the exploded PDF, or as a second attachment to an e-mail.
- A cover sheet may now be specified on a specific Default Message ID Tag, Client Details or a Client-specific Message ID Tag.
- Quick Mail now allows you to attach another PDF document, such as a cover sheet.

▶ **Fax Server Support**

- A new E-mail Address Format option allows you to control the format of the e-mail addresses you are sending to, which is useful for sending e-mails to a fax server.

▶ **New Utilities**

- A new Completed Processing Notification option allows you to specify a process to be executed at the end of processing, such as a .BAT or .EXE. You can use this feature to copy, move or delete PDF files and more.
- A new PDF Combiner utility enables you to combine multiple master PDF files that may then be exploded to send multiple reports to a recipient in a single PDF attachment.
- A new PDF Viewer utility is included.

▶ **Other Conveniences**

- PDF-eXPLODE Options have a new user interface making it easier to navigate.

**PDF-eXPLODE**

- A new item on the Printer Menu, **Cancel**, makes it easier to cancel a document that is being processed.
- Changes in the PDF-eXPLODE architecture improve its ability to withstand antivirus software attempts to disable/remove PDF-eXPLODE program components.
- Changes in the PDF-eXPLODE architecture improve support for larger and more complex documents.

# What's New in Version 4

This topic presents the new features of PDF-eXPLODE Version 4 to users already familiar with the features in Versions 1, 2 and 3.  Below is a summary of the new features with links to the help topics that describe each feature in more depth.

**Windows Support**

- PDF-eXPLODE now works with Windows 7, Windows Server 2008 and 64-bit versions of Windows.

**Program Architecture**

- A new exploding engine processes jobs up to 100% faster, new PDF creation engine produces PDF files up to 25% faster.
- Printer Server and Terminal/Citrix Server versions now create a separate print queue for each user to avoid collisions.

**Exploding / E-mailing Options**

- **Two methods of exploding:**  You can choose between exploding a pag where a Tag exists OR you can explode all blank pages (without a tag) based on the a previous page with a tag.
- **E-mail blast without PDF attachments**: You can now configure PDF-eXPLODE to not include PDF attachments when sending e-mails. This feature is available in Mail Settings or can be specified on a specific Default Message ID Tag, Client Details or a Client-specific Message ID Tag. This feature enables you to use PDF-eXPLODE as a bulk e-mail merge program. Using variables in the <pdfexplode> tag, you can merge database information into the e-mail subject and message. Plus, you can optionally include a cover sheet of any file type (PDF, DOC, etc).
- **Attach multiple PDF files:** You can now configure PDF-eXPLODE in General Settings to attach multiple PDF files to an e-mail when they are addressed to the same e-mail address. The default behavior is still to send only one PDF attachment per e-mail. Use variables to assign distinct names to the exploded PDF files.
- **Include multiple cover sheet files:** You can now include multiple cover sheet files. If you select to attach them as separate files, files can be of any type (not limited to PDF.) This feature is available in General Settings or can be specified on a specific Default Message ID Tag, Client Details or a Client-specific Message ID Tag.
- **PDF-eXPLODE Exploding Method:** The exploding engine now offers 2 distinct methods of exploding:
    1. **Only pages containing a TAG will be exploded:** This is the default method where every page must contain a tag. A blank Tag page will be ignored in the exploding process.
    2. **Blank TAG pages are exploded using the previous Tag page:** if your document does not contain TAGs on every page, the engine can be configured to explode the 'blank-Tag' page(s) using the last Tag found on a page immediately prior to the blank Tag page. You can also 're-tag' a page again in the batch which will be then combined with previous pages
- **PDF-eXPLODE tag:**
    1. You can now use curly braces ({})or square brackets ([]) instead of angle brackets (<>). For example: {pdfexplode}...{/ pdfexplode} or [pdfexplode...[/pdfexplode] are valid, but you cannot mix angle brackets, curly braces and square brackets within a tag.
    2. The maximum length of the contents of a PDF-eXPLODE tag is increased to 240 characters from 190 (i.e. the text between <pdfexplode> and </pdfexplode>.
        > Certain invalid characters will be replaced automatically. For example, forward slash (/) will be replaced by hyphen (-) if used within a date or underscore (_) if used within a name. Double-quote (") will be replaced by single-quote (').
- **Set Reply To e-mail address:** You can now control the return path in the e-mail internet header in Mail Settings or in Variable Settings separately from the sender e-mail address.
    - **Variables:**The number of variables supported is increased from 6 to 9. You can circumvent the limit of 9 variables using the new VSplit() and MSplit() functions to extract portions of a variable within an e-mail subject or message (see next item).
    - You can manipulate and format variables in e-mail subjects and messages using programming functions, including: VSplit(), MSplit(). Replace(), FormatDate(), Ndays(), Upper(), Lower(), Proper(), Replace(), Trim().
    - You can now set the variable used as the From Address to also set the Return Path / Reply To address. You can also now specify a coversheet file name using a variable on a specific Default Message ID Tag, Client Details or a Client-specific Message ID Tag.
    - You can now specify nested folders in a variable used for the exploded file folder.
- **Print number of copies:** If you print to a physical printer (print only / print also), you can now specify the number of copies.
- **Drag-and-drop PDF files to explode and e-mail:** If you have created a master PDF with another PDF creator and it includes <pdfexplode> tags, you can drag-and-drop the file onto the PDF-eXPLODE window to explode and e-mail. PDF files using version 1.7 or lower of the PDF format are supported.
- **Combine PDF files from the command line:** You can now automate the process of combining master PDF files so that it is possible to include multiple reports into a single e-mail attachment. Use the command line to automate the process.

*PDF-eXPLODE*

- **Embed Images like Logos in your HTML message** using our HTML editor: Choose any JPG, GIF or PNG from either your Hard Drive or from a URL and the editor will add the HTML code required to embed the images into an HTML message at the time of when sending.
- **Insert a watermark** on each page of the 'Master PDF' using our script language

## Administration Enhancements

- **Job completed e-mail log**: You can now attach the log from the current job to the job completed notification e-mail. The log is in comma-separated values (CSV) format and includes the exploded PDF file name and path, e-mail address, date and time.
- **Re-start interrupted process**: If the PDF-eXPLODE process is interrupted after creating the temporary exploded PDF files (named *_expl.pdf), you can manually restart the process and complete the naming, e-mailing and archiving steps. Use the command PDFEXPLODE.EXE –CONTINUE "FolderPath of the_expl.pdf ", for example, PDFEXPLODE.EXE –CONTINUE "C:\PROGRAM FILES\PDFS".
- **Configurable log and settings file locations**: Registry entries are now used to specify the location of log and settings (pdfexplode.ini) files. Registry entries are created under HKEY_LOCAL_MACHINE\Software\PDFeXPLODE on 32-bit computers, or HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\PDFeXPLODE on 64-bit computers.
- **Log SMTP e-mail details**: You can now configure logging to optionally capture the complete conversation between PDF-eXPLODE and the SMTP server to help diagnose problems.
- **Individual user settings on Printer Server**: Now each user can have their own settings on a printer server based on their Windows user account name. A new command line parameter enables administrators to easily setup user accounts.
- **Copy settings utility for Printer Server:** A utility program aids in multi-user administration by allowing you to copy settings from one user to another user.
- **Anti-virus compatibility**: A new PDF-eXPLODE program architecture is more resistant to anti-virus software that interrupts the PDF-eXPLODE process.
- **Font configuration simplified**: It is no longer necessary to manually configure the printer driver's font substitution table. This was necessary on some computers to support newer Windows fonts.

## Utility Programs

- A new PDF Splitter utility can be used to explode a PDF having no <pdfexplode> tags, resulting in a separate file per page ( Pg0001.pdf, Pg0002.pdf…Pg9999.pdf.) You can specify a filename prefix.
- A new PDF Rotate utility can be used to to rotate landscape-oriented pages within a PDF to portrait orientation (counterclockwise 90 degrees).
- A new PDF Viewer utility program is faster and more accurate.
    - A new PDF Printer utility includes the following enhancements:You can now configure the number of copies to print in the printer driver
    - You can now print password protected PDFs.
    - You can now print to any printer on the network.
    - You can now run the print program from the end of processing program (i.e. from the command line) to automate a process.
- A new PDF Explode & E-mail utility program Makes it easy to process PDF files created using other software.
- A new Copy Message ID utility program can copy one Message ID to another default Message ID, specific Client ID or Client-Message ID.

## Retired Features

- The Outlook address lookup feature is no longer supported.
- The PDF Viewer included with Version 3 has been replaced by the PeXPDFViewer described above.
- The button labeled View Transaction Logs on the Logging and Utilities screen is no longer available. In its place, PDF-eXPLODE now creates a log file for each job in an Excel-compatible CSV format. Job logs are stored in a folder named with the Windows user account under the LOGS folder in the PDF-eXPLODE program folder. The log file can be attached to the Completed Processing Notification.

## Installing

PDF-eXPLODE simplifies the installation process with its wizard setup file. With a minimum of mouse clicks, you can install the program on any drive or to any folder. Configuration of the program post install is very important and the setup program comes with a PDF that explains configuration as a step-by-step process.

# System Requirements

- Operating System: Microsoft Windows XP, Windows Server 2003, Windows Server 2008, Windows Vista or Windows 7
- Hard Drive: Minimum 52.5MB of free disk space, plus additional space for PDF files created
- RAM: At least 64MB of available memory, more during PDF creation. The size of the PDF that can be created is limited by the amount of available memory.

# Install PDF-eXPLODE

▶ **Log on to Windows**

- If you are installing PDF-eXPLODE on a server you must be logged on at the console as the administrator.
    - or -
- If you are installing PDF-eXPLODE on a work station or standalone PC, we recommend that you log on as the administrator however it is not a requirement.

▶ **Download PDF-eXPLODE**

- Click the link on the website to download the PDF-eXPLODE setup program, **PDF-eXPLODE Setup.exe**.
- Click **Save** when you are asked "Do you want to run or save this file?"
- Select a folder on your hard drive in which to save the setup file.

▶ **Run the Setup Program**

- When the download is complete, click **Run**.
- If you receive a security warning stating that the publisher could not be verified, click **Run**.
- When you see the Setup Wizard Welcome screen, click **Next**.

▶ **License Agreement**

- Read the License Agreement, select **I accept the agreement** and click **Next**.

▶ **Select Destination Location**

- Select the folder in which you want PDF-eXPLODE program files installed and click **Next**.

▶ **Select Components**

- Click **Next** for Full Installation.

▶ **Select Start Menu Folder**
You may select where to create the PDF-eXPLODE program shortcuts.

- If you want to create the shortcuts in the Start Menu PDF-eXPLODE folder, click the **Next** button.
- If you want to select a different folder, click the **Browse** button and find the folder you want, or type the full pathname of the folder you want, and then click the **Next** button.

▶ **Select Additional Tasks**

- Select **Create a desktop icon** to be able to launch PDF-eXPLODE from your desktop using a Windows shortcut.
- If you select to create a desktop icon, select whether you want the desktop icon **For all users** or **For the current user only**.
    - Select whether to **Create a Quick Launch icon**.  Selecting this option adds a shortcut  icon for PDF-eXPLODE to the Quick Launch portion of the taskbar located next to the **Start** button. If the Quick Launch bar is not displayed, right-click an empty area on the taskbar, point to **Toolbars**, and then click **Quick Launch**.
    - If you right-click an empty area on the taskbar and do not see the **Toolbars** option, click **Lock the Taskbar** to clear the check mark.
- Select whether to **Create an entry in the Windows Explorer context menu**. Selecting this option enables you to right-click a file, such as a Word document, and create a PDF file using PDF-eXPLODE.

▶ **Ready to Install**

- Review your settings.
- Click **Install** to proceed or click **Back** to make any changes.

![PDF-eXPLODE logo]

### ▶ Completing the PDF-eXPLODE Setup Wizard

To complete the installation, you may be asked to restart your computer.

- Select **Yes, restart the computer now** or **No, I will restart the computer later** if you are not ready to restart and begin using PDF-eXPLODE.
- Click **Finish**.

### ▶ Post Installation

Assign "Full control" permissions to the following folders (and their sub-folders) for the Windows user account(s) that will be using PDF-eXPLODE.

- The PDF-eXPLODE program folder. The default location of the program folder on 32-bit systems is C:\Program Files\PDF-eXPLODE and on 64-bit systems is C:\Program Files(x86)\PDF-eXPLODE.
- C:\Temp.
- If you are installing PDF-eXPLODE on Terminal Server or Citrix Server, C:\Windows\Temp.
- If later on you change the default folder(s) in which PDF files are saved, you must also assign Full control permissions to that folder(s) as well.

To assign Full control permissions (this procedure may be slightly different depending on the version of Windows):

1. Open Windows Explorer and navigate to the desired folder.
2. Right-click the folder and select the **Security** tab.
3. Select the desired user name or group.
4. Click **Edit**.
5. Select the **Full control** checkbox.
6. Click **OK** twice.

If, when you print to the PDFeXPLODE printer, the message "System cannot find the file specified" displayed, set the PDF-eXPLODE programs to run as administrator.

1. Navigate to the PDF-eXPLODE program folder.
2. Right-click **PDF-eXPLODE.exe**.
3. Select **Properties**.
4. Click the **Compatibility** tab.
5. Select the checkbox labeled "Run this program as an administrator" or "Allow non-administrators to run this program" (the exact wording depends on the version of Windows.)
6. Click **OK**.
7. Navigate to the C:\Windows\System32 folder and repeat this procedure for the file named **pdfexplodespl.exe**.

If you are using Windows Vista or Windows 7 and, when you print to the PDFeXPLODE printer, warning messages are displayed, turn off User Account Control.

1. Open the Windows Control Panel.
2. Select **User Accounts**.
3. Select **Change User Account Control settings**.
4. Change the setting to **Never notify**.
5. Click **OK**.

### ▶ Getting Started

- If you logged in as administrator to install PDF-eXPLODE, log out and log back in as the user.
- To begin using PDF-eXPLODE, please review the help topic [Getting Started](#).
- If you installed PDF-eXPLODE on a network shared computer, for example to use with Terminal Services, Citrix, Business Objects Enterprise, Crystal Reports Server, SQL Server Reporting Services or as a network shared printer, there are special considerations and configuration settings discussed in the topic on [Multi-user Administration](#).

# Multi-user Administration

PDF-eXPLODE may be installed on a network shared computer (e.g. server) that is used as a terminal server, printer server or report server. However, please be aware that a PDF-eXPLODE server license is required. Refer to [How Licensing Works](#) for more information.

- Example terminal servers: Microsoft Terminal Services, a Citrix Server product
- Example printer server: any computer with PDF-eXPLODE configured as a shared printer
- Example report servers: BusinessObjects, Crystal Reports Server, SQL Server Reporting Services (SSRS)

▶ **Installation**

- Install PDF-eXPLODE at the computer's physical console — Do not install via a remote session.
- Log on to Windows using the Administrator account — Do not log on using a User account with "administrator privileges".

▶ **Server Configurations**

PDF-eXPLODE Terminal Server
> You may configure PDF-eXPLODE in one of two ways: Each user can have their own settings (the default) or all users can share the same settings.

> - To configure PDF-eXPLODE so that all users share the same settings, navigate to the REG folder under the PDF-eXPLODE program folder (default is C:\Program Files\PDF-eXPLODE) open the file named TurnAdminIni_ON.reg. Click OK when prompted. This will direct PDF-eXPLODE to use the settings for the Administrator user account.
> - To configure PDF-eXPLODE so that each user has their own settings, navigate to the REG folder under the PDF-eXPLODE program folder (default is C:\Program Files\PDF-eXPLODE) open the file named TurnAdminIni_OFF.reg. Click OK when prompted. This will direct PDF-eXPLODE to use the settings for the logged-in user account. This is the default setting after installation.

PDF-eXPLODE Printer Server

> - During installation, PDF-eXPLODE is configured to store settings under the Windows Administrator user account (This is equivalent to manually executing the file TurnAdminIni_ON.reg located in the REG folder in the PDF-eXPLODE program folder.)
> - During installation, PDF-eXPLODE is configured to select Very Silent mode in [General Settings](#) to prevent dialogs that require user interaction from displaying on the server console.
> - In the Windows Printers & Faxes folder, right-click PDFeXPLODE, select Sharing..., enable Share this printer, and enter Share name: PDFeXPLODE.
> - On each workstation that requires access to PDF-eXPLODE Printer Server, open the Windows Printers & Faxes folder and add the shared PDF-eXPLODE printer.
> - To evaluate PDF-eXPLODE Printer Server with a trial license, log on to the server using the Administrator account. After you print from a workstation, the Evaluation dialog will display on the server. Select Evaluate this software and click Continue to proceed. This step is not required when you have a paid license.

> You may configure PDF-eXPLODE in one of two ways: Each user can have their own settings (the default) or all users can share the same settings.

> - To configure PDF-eXPLODE so that all users share the same settings, navigate to the REG folder under the PDF-eXPLODE program folder (default is C:\Program Files\PDF-eXPLODE) open the file named TurnAdminIni_ON.reg. Click OK when prompted. This will direct PDF-eXPLODE to use the settings for the Administrator user account.
> - To configure PDF-eXPLODE so that each user has their own settings, navigate to the REG folder under the PDF-eXPLODE program folder (default is C:\Program Files\PDF-eXPLODE) open the file named TurnAdminIni_OFF.reg. Click OK when prompted. This will direct PDF-eXPLODE to use the settings for the logged-in user account. This is the default setting after installation.

> A utility program is available in the PDF-eXPLODE program folder to copy the settings of one user to another user. Run the utility either from the Windows command prompt or from the Start Run command. The syntax is as follows:
> > PeXCopy **From**UserWindowsAccount ToUserWindowsAccount
> For example, to copy Mark's settings to Rob:
> > PeXCopy Mark Rob
> If there are embedded spaces, surround the user account name in double quotes:
> > PeXCopy "Mark Smith" "Rob Jones"

PDF-eXPLODE Report Server

- During installation, PDF-eXPLODE is configured to store settings under the Windows System user account (This is equivalent to manually executing the files TurnAdminIni_ON.reg and TurnSystemIni_ON.reg located in the REG folder in the PDF-eXPLODE program folder.)
- During installation, PDF-eXPLODE is configured to select Very Silent mode in General Settings to prevent dialogs that require user interaction from displaying on the server console.
- To evaluate PDF-eXPLODE Printer Server with a trial license, log on to the server using the Administrator account. After a scheduled report is printed, the Evaluation dialog will display on the server. Select Evaluate this software and click Continue to proceed. This step is not required when you have a paid license.

▶ **Using the Trial License for Evaluation**

- If you are using the Trial License, please be sure to close PDF-eXPLODE after changing or viewing settings.
- If you have set Administrator account settings ON, you must be at the server console to respond to the Evaluation dialog that appears each time you print to PDF-eXPLODE.
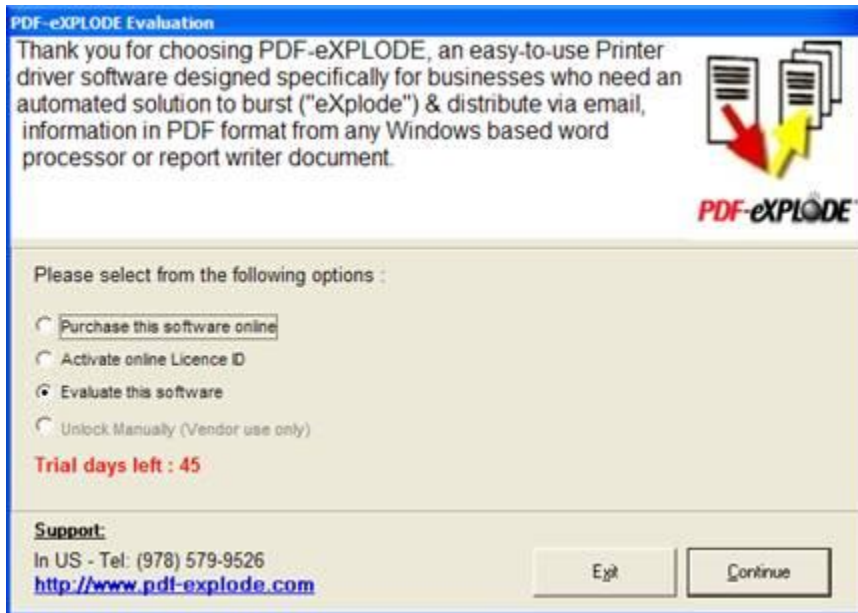
# What's Installed Where

When you install PDF-eXPLODE, the following files and folders are created on your system.  If you remove PDF-eXPLODE, you may optionally keep your settings (PDFEXPLODE.ini).

Note: You may wish to periodically delete old files in the C:\Program Files\PDF-eXPLODE\LOGS and C:\Program Files\PDF-eXPLODE\PDFs folders to make more disk space available.

| Folder | Files installed |
| --- | --- |
| C:\Program Files\PDF-eXPLODE | Program, license file, properties and uninstall information (PDF-eXPLODE.exe, PDF-eXPLODE.lf, pdfexplode.properties, UninstPDFeXPLODE.exe, unins000.exe and unins000.dat)<br><br>This is the default program folder. You may change the default program folder at the time of installation. |
| C:\Program Files\PDF-eXPLODE\CONTROLS | Program component files.<br><br>This location may be configured using the Registry key:<br>32-bit Windows: \HKEY_LOCAL_MACHINE\Software\PDFeXPLODE\CONTROLDir<br>64-bit Windows: \HKEY_LOCAL_MACHINE\Software\WOW6432NODE\PDFeXPLODE\CONTROLDir |
| C:\Program Files\PDF-eXPLODE\EXPLODED PDFS | Folder created to contain exploded PDF files generated by PDF-eXPLODE.<br><br>The locations where exploded PDF files are archived can be configured in Mail Settings in the Exploded File Path, or on a specific Default Message ID Tag, Client Details or a Client-specific Message ID Tag. |
| C:\Program Files\PDF-eXPLODE\FAILED | Folder will contain PDF files that failed to be sent by e-mail |
| C:\Program Files\PDF-eXPLODE\HELP | Help file (PDF-eXPLODE.chm) |
| C:\Program Files\PDF-eXPLODE\ICONS | Various icons used in the program group |
| C:\Program Files\PDF-eXPLODE\INIs | PDFeXPLODE.ini (client, i.e. user, settings).<br><br>To allow multiple users to each have their own settings, files are stored in folders named with the Windows user account name.<br><br>This location may be configured using the Registry key:<br>32-bit Windows: \HKEY_LOCAL_MACHINE\Software\PDFeXPLODE\INIDir<br>64-bit Windows: \HKEY_LOCAL_MACHINE\Software\WOW6432NODE\PDFeXPLODE\INIDir |
| C:\Program Files\PDF-eXPLODE\LOGS\ | Program log file (PDF-eXPLODE.log), spooler log file (PeXSPOOLER.log), the current run log (PDFeXPLODERunLog.csv) and backup versions from previous runs.<br><br>To allow multiple users to each have their own log, files are stored in folders named with the Windows user account name.<br><br>This location may be configured using the Registry key:<br>32-bit Windows: \HKEY_LOCAL_MACHINE\Software\PDFeXPLODE\LOGDir<br>64-bit Windows: \HKEY_LOCAL_MACHINE\Software\WOW6432NODE\PDFeXPLODE\LOGDir |
| C:\Program Files\PDF-eXPLODE\PDFs | Folder created to contain PDF files (called "master" PDF files) generated by PDF-eXPLODE.<br><br>The folder where master PDF files are created can be configured in General Settings using Default Document Path. |
| C:\Program Files\PDF-eXPLODE\Temp | Folder created to contain temporary files for jobs in process. Files are moved here from C:\temp\PDFeXplode.<br><br>To allow multiple users to each have their own temp files, files are stored in folders named with the Windows user account name.<br><br>This location may be configured using the Registry key:<br>32-bit Windows: \HKEY_LOCAL_MACHINE\Software\PDFeXPLODE\PDTempDir<br>64-bit Windows: \HKEY_LOCAL_MACHINE\Software\WOW6432NODE\PDFeXPLODE\PDTempDir |

PDF-eXPLODE

| | |
|---|---|
| C:\temp\PDFeXplode | Temporary files being transferred from the Windows printer spooler to the Temp folder under the PDF-eXPLODE program folder.<br><br>To allow multiple users to each have their own temp files, files are stored in folders named with the Windows user account name.<br><br>This location may be configured using the Registry key:<br>32-bit Windows: \HKEY_LOCAL_MACHINE\Software\PDFeXPLODE\PSTempDir<br>64-bit Windows: \HKEY_LOCAL_MACHINE\Software\WOW6432NODE\PDFeXPLODE\PSTempDir |
| C:\WINDOWS\system32 | Application Extension and ActiveX control files required by PDF-eXPLODE |

# Remove PDF-eXPLODE

You may need to remove PDF-eXPLODE from your computer. Note: If you are running a 45-day trial version and you remove and re-install PDF-eXPLODE, the 45-day trial period will not reset.

▶ **Removing PDF-eXPLODE**

From the Start Menu

1. Click Start.
2. Point to Programs.
3. Point to the PDF-eXPLODE program group.
4. Click the Uninstall PDF-eXPLODE icon.


From the Control Panel

1. Click Start.
2. Point to Settings.
3. Point to Control Panel.
4. Click the Add or remove programs
5. Scroll the list down until the PDF-eXPLODE icon is visible.
6. Click the PDF-eXPLODE icon.
7. Click Change/Remove.
8. Click Yes to confirm the program will be removed.
9. Select whether to delete all program settings (i.e. the PDF-eXPLODE.ini file).

# Purchasing and Registering

When you download your Free Trial, it extends for 45 days. During the evaluation period you are entitled to priority support. Purchasing once you are done evaluating, will provide you with a perpetual license to use PDF-eXPLODE and the first 60 days of the purchase comes with free priority support. After that, should you require any operating support, you must purchase a priority support plan which is relatively inexpensive. This provides for a response to your requests or enquiry within 24 business hours.

# Trial Version

The PDF-eXPLODE trial version allows you to evaluate the product and all of its capabilities for a period of 45 days from the date on which you install it.  The trial version is the same software as the fully-licensed product with the following limitations:

- Only the first 25 PDF files that are exploded will be e-mailed and archived.
- E-mail messages will include promotional copy in the message footer with a link to the PDF-eXPLODE website.
- Archived PDF files will contain a cover page indicating that the file was created with an unlicensed copy of PDF-eXPLODE.
- The trial version cannot be used after 45 days following installation of the software.

To remove the trial version limitations and have a full-licensed, fully-functional product, purchase and register a license at any time during or after the 45-day trial period.  You will receive a license id and password that must be activated over the Internet and will remove the trial version limitations - there is no need to uninstall or re-install the software.

# Purchase Online

When you open the Trial Version of PDF-eXPLODE, either during or after the 45-day trial period, you may purchase a full product license to remove the Trial Version limitations.  Licenses are purchased over the internet using a credit card for payment.  A license ID and password will be provided immediately after payment is authorized and will be confirmed in an e-mail automatically sent to the e-mail address you provide.

1. To begin, start PDF-eXPLODE.
2. In the PDF-eXPLODE Evaluation dialog box, select Purchase this software online and then click Continue.



3. Click **Yes** when prompted **Display order form?**
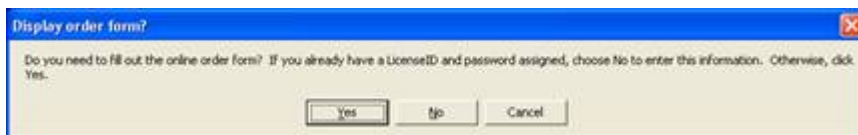


4. Click **OK** when prompted **About to display order form**
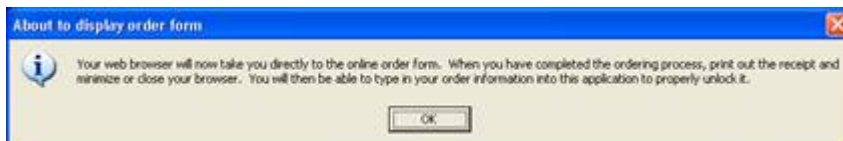


5. The **Order Process** form will appear in an Internet browser window.  Complete the online forms and print the completed order invoice, which contains your License ID and Password.
6. Now select **Activate online License ID** and click **Continue**.
7. The **Unlock via Internet** dialog box will appear in a separate window.  At the end of the order process you were supplied with a License ID and Password.

8. Enter your **License ID** and **Password** in the **Unlock via Internet** dialog box and then click **OK**.

# Register Online

When you purchase PDF-eXPLODE online, you can activate the license at the same time after completing the order process.  However, it is not necessary to register at the time you purchase - you may do so at any time thereafter by following the steps below.  Registering your product will remove the Trial Version limitations.

After purchasing online, a license ID and password were provided in an invoice for you to have printed and were confirmed in an e-mail automatically sent to the e-mail address you provide.  You will need these to register.

1. To begin, start PDF-eXPLODE.
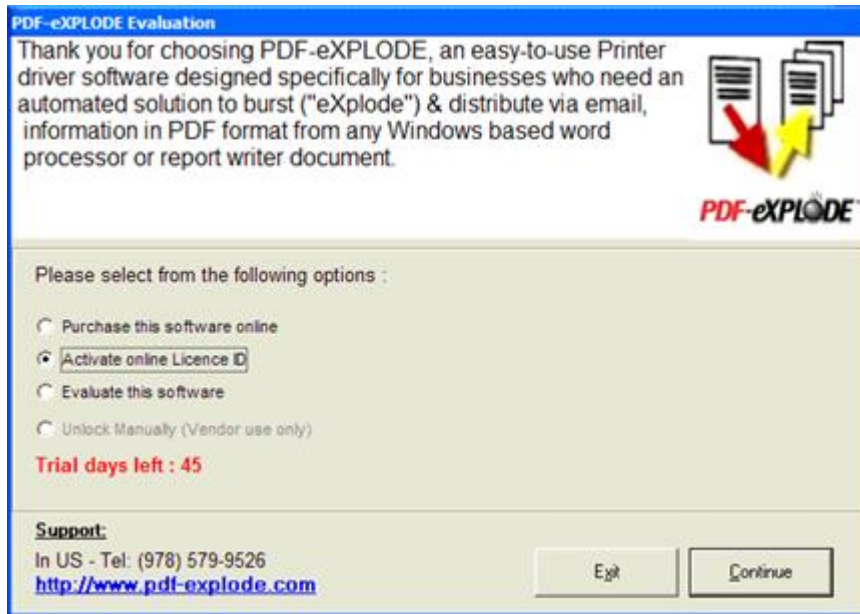2. In the **PDF-eXPLODE Evaluation** dialog box, select **Activate online License ID** and then click **Continue**.



1. Enter your **License ID** and **Password** in the **Unlock via Internet** dialog box and then click **OK**.

# Upgrading to Version 4

## Installing

You will need to uninstall the previous version before you can install Version 4. **The architecture and the installation routine has completely changed, so it is best to install PDF-explode V4 into a different folder after uninstalling.** This ensures that Windows does not point old registry references to the new files. Ideally just change the installed path to PDF-eXPLODEV4.

Before you uninstall, please save the PDF-eXPLODE.INI settings file using Win Explorer. Once you install PDF-eXPLODE V4, just restore the INI file to the INIS sub-folder under the current user's folder in INIS (or Administrator if using a network product)

Once installed, open PDF-eXPLODE such that it is accessing the just saved PDF-eXPLODE.INI. Go through every screen ensuring the values of check boxes and radio selection buttons (circles with a dot in the center)are correctly set.

In version 4:

- all previously stored 'text' or boolean (aka True/False) values have now been converted to an integer value of 1 = True, 0 = False or the numbers 1,2..5 are assigned where a multiple selection is used
- all password encryptions have been changed. This means that the password MUST be retyped and then Saved (or 'Apply' clicked) to force a recalculation.
- all email messages are now capable of word wrap and are not truncated at 75 characters. To leverage the benefit of a continuous paragraph feed, you must retype and save the message.

*PDF-eXPLODE*

# Getting Started Tutorials

Learn how to use PDF-eXPLODE in a few short lessons .
There are 3 basic steps to this process. Watch a 3-minute demo of PDF-eXPLODE
PDF-eXPLODE in 3 easy steps

# Create a PDF File

The purpose of this help topic is to show how to create your first PDF file using PDF-eXPLODE. PDF-eXPLODE is a valuable tool for automatically separating a large document into individual sections and sending them as e-mail attachments to different recipients. However, PDF-eXPLODE can also be used simply to save a document in a PDF file as follows.

The following instructions assume you have just installed PDF-eXPLODE and have not yet changed the default configuration settings. Please note the default paper size supported by PDF-eXPLODE is Letter. If your paper size is different, for example A4, you must edit the PDF File Creation Properties and set the appropriate **Paper Size** before proceeding.

▶ **Create a PDF File**

1. Open an existing document in an application such as Microsoft Word.
2. On the **File** menu, click **Print**.
3. In the **Print** dialog box, select the printer named **PDF-eXPLODE** and click **OK**.
4. When PDF-eXPLODE displays the **Print Options** dialog, click **Create PDF**.
5. In the **Save as** dialog box, select a folder, enter a file name and click **Save**.


▶ **View a PDF File**

You may view the PDF file you just created if you have a PDF viewer installed such as the free Adobe Reader, available at www.adobe.com. If you do not have a PDF viewer installed, PDF-eXPLODE includes one named PeXPDFViewer, which can be accessed from the Logging and Utilities screen.

1. Click **Start**, point to **Programs**, point to **Accessories**, and then click **Windows Explorer**.

    -or-

    Right-click **Start** and click **Explore**.
2. Select the folder in which you saved your PDF file.
3. Double-click the PDF file you created to open it.
4. Close the PDF when you are done viewing it. (If you leave it open and try to create it again you will get an error because the file is still in use and cannot be overwritten.)

# Explode a PDF File

At the heart of PDF-eXPLODE is the ability to explode, or separate, a PDF file into individual PDF files. This enables you, for example, to select and combine different portions of a document into a resulting PDF file, or to e-mail different people different sections of a document. The following instructions assume you have just installed PDF-eXPLODE and have not yet changed the default configuration settings.

▶ **Specify the Exploded PDF Filename**

1. Open an existing document in an application such as Microsoft Word. Make sure the document contains multiple pages.
2. At the top of page 1, type the following PDF-eXPLODE Tag, where "page1_" is the filename prefix of the PDF file that will contain the contents of page 1.

   &lt;pdfexplode&gt;page1_&lt;/pdfexplode&gt;

3. In the page header, type the following PDF-eXPLODE tag, where "mydocument_" is the filename prefix of the PDF file that will contain the contents of page 1.

   &lt;pdfexplode&gt;mydocument_&lt;/pdfexplode&gt;

   ▶ **Tips**
   - Only pages that begin with a PDF-eXPLODE tag will be included in the PDF file attached to the e-mail, so the page header is the ideal location to ensure each page is included.
   - To type text in the page header of a Microsoft Word document, on the **View** menu click **Header and Footer**. After typing the text, click anywhere outside the header.
   - The case of the open &lt;pdfexplode&gt; tag and the close &lt;/pdfexplode&gt; tag must match, so always use lowercase to be safe.
   - A tag must fit entirely on a single line. Apply a small font size to minimize the risk of a tag not fitting entirely on a single line.
   - The entire tag must have a standard Windows font applied to it, such as **Arial** or **Times New Roman**.
   - You may change the color of the tag to white to make it invisible in the resulting document.
   - You may include multiple PDF-eXPLODE tags per page if you want to include a page in multiple exploded documents.
   - All of the pages associated with the same filename will be combined into a single PDF file.

▶ **Create and Explode the Document**
PDF-eXPLODE can create and explode a PDF. However, if you have an existing PDF created by another process, you can still use PDF-eXPLODE to explode it - refer to the instructions for using PDF-eXPLODE from a Command Line.

1. On the **File** menu, click **Print**.
2. In the **Print** dialog box, select the printer named **PDF-eXPLODE** and click **OK**.
3. When PDF-eXPLODE displays the **Print Options** dialog, click **Explode Now**.
4. In the **Save as** dialog box, select a folder, accept the default filename or enter a different file name and click **Save**. (This is the "Master" PDF file that contains the entire document. Any existing version is overwritten without warning each time you re-create it.)
5. Click **OK** when prompted that PDF-eXPLODE successfully exploded the file.

▶ **View the Resulting PDF Files**
You may view the PDF file you just saved if you have a PDF viewer such as the free Adobe Reader, available at www.adobe.com.

1. Click **Start**, point to **Programs**, point to **Accessories**, and then click **Windows Explorer**.

   -or-

   Right-click **Start** and click **Explore**.
2. Select the folder in which you saved your PDF file.
3. Double-click the Master PDF file you created to open it. (This is the file created in step 4 above, which defaults to the name **PDFeXPLODE.PDF**.) Close your PDF viewer when done.
4. View your exploded PDF files in the same manner. The file containing all of the pages in the document will be named "**mydocument_*.pdf**" where the "*" is the date and time the file was created. This feature helps in archiving different versions of, say, an account statement that is sent monthly. The other file, containing only the first page of your document will be named "**page1_*.pdf**".

# E-mail a PDF File

Although PDF-eXPLODE can explode a document or report into separate PDF files without sending them by e-mail, most users will want to take advantage of the ability to send e-mail attachments.
The following instructions assume you have just installed PDF-eXPLODE and have not yet changed the default configuration settings.

▶ **Configure E-mail Settings**
To e-mail a PDF file using PDF-eXPLODE, you first need to configure your e-mail settings. Follow the instructions on the Mail Settings topic.

▶ **Specify the E-mail Recipient**

1. Open an existing document in an application such as Microsoft Word.
2. In the page header, type the following PDF-eXPLODE Tag, replacing "me@somewhere.com " with your actual e-mail address.

   <pdfexplode>me@somewhere.com</pdfexplode> ▶ Tips
   - Only pages that begin with a PDF-eXPLODE tag will be included in the PDF file attached to the e-mail, so the page header is the ideal location to ensure each page is included.
   - To type text in the page header of a Microsoft Word document, on the **View** menu click **Header and Footer**.  After typing the text, click anywhere outside the header.
   - The case of the open <pdfexplode> tag and the close </pdfexplode> tag must match, so always use lowercase to be safe.
   - A tag must fit entirely on a single line.  Apply a small font size to minimize the risk of a tag not fitting entirely on a single line.
   - The entire tag must have a standard Windows font applied to it, such as **Arial** or **Times New Roman**.
   - You may change the color of the tag to white to make it invisible in the resulting document.
   - You may include multiple PDF-eXPLODE tags per page if you want to send a page to multiple recipients.
   - All of the pages associated with the same e-mail address will be combined into a single PDF file.

▶ **Create, Explode and E-mail the Document**
PDF-eXPLODE can create and explode a PDF. However, if you have an existing PDF created by another process, you can still use PDF-eXPLODE to explode and e-mail it - refer to the instructions for using PDF-eXPLODE from a Command Line.

1. On the **File** menu, click **Print**.
2. In the **Print** dialog box, select the printer named **PDF-eXPLODE** and click **OK**.
3. When PDF-eXPLODE displays the **Print Options** dialog, click **Options**.
4. In the **Options** dialog box, under **PDF-eXPLODE Settings**, select **Send by email to all email addresses from the document tags**, and then click **Save**.
5. In the **Print Options** dialog, click **Explode Now**.
6. In the **Save as** dialog box, select a folder, enter a file name and click **Save**.
7. Click **OK** when prompted that PDF-eXPLODE successfully exploded the file.

▶ **View the Resulting E-mail**
You may view the PDF file you just e-mailed yourself if you have a PDF viewer such as the free Adobe Reader, available at www.adobe.com.

1. In your e-mail inbox, locate the e-mail you just sent yourself.
2. Open the e-mail and then open the PDF attachment. Close your PDF viewer when done.

▶ **View the Resulting PDF File**
You may view the archived copy of the PDF file you just sent if you have a PDF viewer such as the free Adobe Reader, available at www.adobe.com.

1. Click **Start**, point to **Programs**, point to **Accessories**, and then click **Windows Explorer**.

   -or-

   Right-click **Start** and click **Explore**.
2. Select the folder in which you saved your PDF file.
3. Double-click the PDF file you created to open it.  (The filename will be your e-mail address followed by the date and time.)  Close your PDF viewer when done.

▶ **View the PDF-eXPLODE Log File**
It is a good idea to check the PDF-eXPLODE Log File to be sure no errors occurred sending the e-mails.

**PDF-eXPLODE**

1. Click **Start**, point to **Programs**, point to **PDF-eXPLODE**, and then click **PDF-eXPLODE**.
2. On the **Printer** menu, click **PDF-eXPLODE Options...**.
3. In the Options List, click **PDF-eXPLODE Settings**.
4. Click **View Transaction Logs** to display individual log files for each e-mail in an Explorer window.  The PDF file names have the word "SUCCESS" or "FAILED" appended to provide a compact summary status view. ▶ Tips

   - Open a file if the name ends in "FAILED" to see a descriptive error message.
   - Click **View Detailed Log** to display a detailed log of PDF-eXPLODE operations if you need more information.
   - The detailed log appears in chronological order of when events occur, so the most recent events appear at the bottom.
   - You can see all of the steps taken by PDF-eXPLODE and can note any errors encountered.
   - Be sure also to check the e-mail inbox for the **Sender Name** you specified in PDF-eXPLODE **Connection Settings**. Undeliverable e-mails may return error notification e-mails to this address.
5. On the **Printer** menu, click **Exit** to close PDF-eXPLODE.

**PDF-eXPLODE**

# Automate the Process

As you begin to use PDF-eXPLODE on a routine basis, you may no longer want to interact with the **Print Options** dialog each time you use PDF-eXPLODE.  A feature called **Silent Mode** enables you to automate the complete process of document creation, explosion and e-delivery.

▶ **Selecting Silent Mode**

1. Click **Start**, point to **Programs**, point to **PDF-eXPLODE**, and then click **PDF-eXPLODE**.
2. On the **Printer** menu, click **PDF-eXPLODE Options...**.
3. In the **Options** dialog box, under **General Settings**, select **Explode/E-mail in Silent Mode**.

   **Important**: If you are using a PDF-eXPLODE Server product (Report Server, Printer Server or Terminal Server) you must also select **Suppress display of any processing dialogs in Silent Mode**.
4. Click **Save**. On the **Printer** menu, click **Exit** to close PDF-EXPLODE.

▶ **Specify the E-mail Recipient**

1. Open an existing document in an application such as Microsoft Word.
2. In the page header, type the following PDF-eXPLODE Tag, replacing "me@somewhere.com " with your actual e-mail address.

   `<pdfexplode>me@somewhere.com</pdfexplode>` ▶ Tips
   - Only pages that begin with a PDF-eXPLODE tag will be included in the PDF file attached to the e-mail, so the page header is the ideal location to ensure each page is included.
   - To type text in the page header of a Microsoft Word document, on the **View** menu click **Header and Footer**.  After typing the text, click anywhere outside the header.
   - The case of the open `<pdfexplode>` tag and the close `</pdfexplode>` tag must match, so always use lowercase to be safe.
   - A tag must fit entirely on a single line.
   - You may include multiple PDF-eXPLODE tags per page if you want to send a page to multiple recipients.
   - All of the pages associated with the same e-mail address will be combined into a single PDF file.
   - You may change the color of the tag to white to make it invisible in the resulting document.

▶ **Create, Explode and E-mail the Document**

1. On the **File** menu, click **Print**.  PDF-eXPLODE creates a master PDF, explodes it into a separate PDF for each e-mail recipient and sends each as an e-mail attachment.

▶ **View the Resulting E-mail**
You may view the PDF file you just e-mailed yourself if you have a PDF viewer such as the free Adobe Reader, available at www.adobe.com.

1. In your e-mail inbox, locate the e-mail you just sent yourself.
2. Open the e-mail and then open the PDF attachment. Close your PDF viewer when done.

▶ **View the PDF-eXPLODE Log File**
It is a good idea to check the PDF-eXPLODE Log File to be sure no errors occurred sending the e-mails.

1. Click **Start**, point to **Programs**, point to **PDF-eXPLODE**, and then click **PDF-eXPLODE**.
2. On the **Printer** menu, click **Show Log File**.
3. View the log and click **Close** when finished

▶ **Tips**
   - The log appears in reverse order of when events occur, so the most recent event is listed first.
   - You can see all of the steps taken by PDF-eXPLODE and can note any errors encountered.
   - Be sure also to check the e-mail inbox for the **Sender Name** you specified in PDF-eXPLODE **Connection Settings**. Undeliverable e-mails may return error notification e-mails to this address.

1. On the **Printer** menu, click **Exit** to close PDF-eXPLODE.

**PDF-eXPLODE**

# Reference

This chapter has details of each menu item

# Start PDF-eXPLODE

You may open PDF-eXPLODE from the Windows Start menu or, optionally, from the desktop icon, if you chose to create one during installation.  In addition, you may open PDF-eXPLODE from the Printers and Faxes Window.


▶ **Starting PDF-eXPLODE**
**From the Start Menu**

1. Click **Start**.
2. Point to **Programs**.
3. Point to the **PDF-eXPLODE** program group.
4. Click the **PDF-eXPLODE** icon.


**From the Desktop**
If you chose to create a Desktop Icon during installation:

1. Double-click the **PDF-eXPLODE** icon.


**From the Printers and Faxes Window**

1. Click **Start**.
2. Point to **Settings**.
3. Click **Printers**.
4. Right-click the **PDF-eXPLODE** icon.
5. Click **Open**.

*PDF-eXPLODE*

# Main Menu

The PDF-eXPLODE program window displays the main menu and and the print queue. The main menu consists of a menu bar with the following menu items.

▶ **Printer Menu**

- Click **Suspend Printer** to hold PDF-eXPLODE jobs in a queue until you are ready to proceed.  For example, if you have a report that takes a long time to generate and you do not want to be connected to the Internet during report generation you can stop the printer, generate the report, then connect to the Internet and restart the printer to explode and e-mail the report.

  When **Suspend Printer** is selected, a check mark will appear next to the menu item.  Documents that you print while Stop Printer is selected are held in the PDF-eXPLODE queue.  The queue appears below the main menu and displays information about documents waiting to be exploded and e-mailed.

  Click **Suspend Printer** again to restart the printer and remove the check mark .  Any print jobs pending in the queue will be processed (exploded and e-mailed).  When **Suspend Printer** is de-selected, processing continues.  If silent mode is selected on General Settings, the pending documents are exploded and e-mailed immediately.  If silent mode is not selected then the **Print Options** dialog is displayed to allow the user to control processing. Click **Set As Default Printer** to specify that PDF-eXPLODE is the default printer used when you click **Print** on the **File** menu of many Windows-based programs.  A check mark will appear next to the PDF-eXPLODE printer icon in your PC's **Printers and Faxes** window.

    ▶ **Tip**
  - To open Printers and Faxes, click **Start**, click **Control Panel**, click **Printers and Other Hardware**, and then click **Printers and Faxes**.
- Click **Cancel Document** to remove the selected document(s) from the queue.
- Click **PDF-eXPLODE Options...** to display and/or modify options including General Settings, Security Settings and Mail Settings, as well as Default Messages, Client Details and Client-specific Messages.
- Click **Exit** to close PDF-eXPLODE.  It will still remain active as a printer driver enabling you to create, explode and e-mail PDF files when you click **Print** on the **File** menu of many Windows based programs.

▶ **View Menu**

- Click **Status Bar** to display the status bar at the bottom of the PDF-eXPLODE window.  When selected, a check mark will appear next to the menu item.  Click **Status Bar** again to hide the status bar and remove the check mark.  The status bar displays a count of the number of documents in the PDF-eXPLODE FAILED folder and in the queue.

▶ **Help Menu**

- Click **Help Topics** to access PDF-eXPLODE help information.
- Click **About PDF-eXPLODE** to display license and system information.

Below the menu bar is a print queue showing any files that were printed to PDF-eXPLODE and are currently being processed. Refer to **Suspend Printer** on the **Printer Menu** for more details.

The print queue may also be used a shortcut for printing documents to PDF-eXPLODE.  To do so, simply drag-and-drop a file from Windows Explorer onto the PDF-eXPLODE print queue. Note that document types that store a printer name (e.g. Microsoft Word documents) must be saved with PDF-eXPLODE as the named printer.

**PDF-eXPLODE**

# Specifying Options

This chapter relates to each Menu item you access when you open the PDF-eXPLODE configuration screen "Options".

To open the *Options* screen, start PDF-eXPLODE from the desktop using the shortcut, and then click Options from the "Printer" menu.

# General Settings

General Settings let you choose how you want to create and deliver the PDF files created by PDF-eXPLODE, as well as some default document properties.

To begin, start PDF-eXPLODE.
▶ **Open General Settings**

1. On the **Printer** menu, click **PDF-eXPLODE Options...**.
2. In the **Options List**, click **General Settings**.

▶ **E-Mail**

- Choose **Explode only, no E-mails** if you want to explode the master PDF but do not want to send exploded PDF files by e-mail to clients. This option might be used to generate exploded PDF documents for archiving or for distribution via a network folder or FTP, or for testing so that exploded PDF files can be viewed before being sent.
- Choose **Explode and E-Mail to all tag e-mail addresses** to send exploded PDF files by e-mail to all e-mail addresses in the document tags. This option is selected as the default. Note: Tags that are not valid e-mail addresses will not be sent but the exploded PDF files will be created.
- Choose **Explode and E-Mail to only pre-defined Client ID E-mail Addresses** to send only the individual PDF files tagged with an e-mail address that you have defined in Client Details.  This feature allows you to treat selected clients as special cases. Note: Tags that are not valid e-mail addresses will not be sent but the exploded PDF files will be created.

▶ **E-Mail Notification**

- Choose **None** if you do not want to be notified by e-mail when a recipient reads an e-mail sent by PDF-eXPLODE.
- Choose **Notify me on Read** to receive an e-mail notification (called a "read receipt") when a recipient reads an e-mail sent by PDF-eXPLODE. Note that not all e-mail servers support this option and also a recipient may optionally deny sending a read notification.

▶ **E-Mail Flags**
Select e-mail flags to apply to every e-mail that is sent. You may enable/disable the default e-mail flags for a specific e-mail message on a Default Message ID Tags screen, for a specific client on a Client Details screen or for a client-specific e-mail message on a Client-specific Message ID Tags screen. Note that some e-mail clients, such as Outlook Express, do not display all of the e-mail flags.

- Set **Importance** to **Normal**, **Low** or **High**. Press the Delete key to clear the selection.
- Set **Sensitivity** to **Normal**, **Personal** , **Private** or **Confidential**. Press the Delete key to clear the selection.

▶ **Master PDF Properties**
You may specify the following PDF creation options and PDF file properties, which apply to every PDF file created. Property fields including Title, Author and Subject may be displayed when a PDF file is opened  in a viewer such as Adobe Reader.

- **Explode/E-mail in Silent Mode**: If you select this checkbox, the program will run in Silent Mode, meaning it will run unattended after you initiate printing a document. This is the default option. If you have an application that can initiate printing from the Windows Scheduler, then this option will enable you to e-mail documents when you are away from the computer.  If you prefer to manage the delivery process, uncheck the checkbox and manually set options  in the Print Options dialog after you initiate printing a document. If you print a document containing no PDF-eXPLODE tags, the Print Options dialog will display regardless of the Silent Mode setting (except on PDF-eXPLODE Printer Server and PDF-eXPLODE Report Server, since dialogs cannot be displayed on the workstation.)

  - Note: you must select this option (and Very Silent Mode - see below) when operating PDF-eXPLODE on a Printer Server or Report Server that is running under the SYSTEM account since there is no user interface available for the SYSTEM account. Failure to do so will result in the application appearing to be frozen.**Suppress display of any processing dialogs in Silent Mode [Very Silent Mode]**: If you have selected **Explode/E-mail in Silent Mode** and select this checkbox, then all dialog and message windows will be suppressed. This is helpful if you want to process files with PDF-eXPLODE in the background while you work on other Windows applications.

    Note: you must select this option when operating PDF-eXPLODE on a Printer Server or Report Server that is running under the SYSTEM account since there is no user interface available for the SYSTEM account. Failure to do so will result in the application appearing to be frozen.
- **Default Document Title** specifies the filename and title of the master PDF document.▶  Tips
  - 

![PDF-eXPLODE logo]

If you want to specify a different master PDF document name for different documents, create a [Default Message ID](), for example **Invoice**, and use **Exploded File Name** to specify the file name, for example **MasterInvoices**. Then insert a <pdfexplode> tag on every page of your document as follows:

> <pdfexplode>Invoice#</pdfexplode>

- Use the Default Message ID **Exploded File Path** to designate a folder in which to save the file.
- **Default Author** shows the name of the person who created the PDF document.
- **Default Subject** specifies the subject of the PDF document.
- **Default Document Path** selects the folder in which the master PDF document and the exploded PDF documents are saved. Before the individual PDF documents are created, a master PDF document is created, so it can be "exploded," or split, into individual PDF documents. The recommended setting for this property is **C:\Program Files\PDF-eXPLODE\PDFs**, where C:\Program Files\PDF-eXPLODE is the name of the folder where the program is installed. Click **Browse** to navigate to the desired folder. You may override the location of the exploded PDF documents for a specific e-mail message on a [Default Message ID Tags]() screen, for a specific client on a [Client Details]() screen or for a client-specific e-mail message on a [Client-specific Message ID Tags]() screen.

▶ **Default Cover Sheet**

- **Cover Sheet** specifies whether to insert an existing PDF file into each exploded PDF, and specifies the full pathname to the selected PDF. The selected PDF may be any number of pages. Use this feature for such applications as including a generic newsletter or promotion in every PDF file created by PDF-eXPLODE. PDF-eXPLODE will not insert a cover sheet if the exploded PDF file is password protected. If the cover sheet is attached separately, it can be any file type (i.e. not restricted to PDF.)Select the checkbox to enable insertion of the cover sheet, or de-select the checkbox to disable this feature.
- Select whether to position the cover sheet file in the **Front** or **Back** of the exploded PDF file or as a **Separate** attachment. If you select Front or Back, the cover sheet file must be a PDF. If you select Separate, the file can be any type.
- Click **Browse** to navigate to the desired PDF file name. If you select to attach the cover sheet as a separate file, you can select multiple files by separating the filenames with a vertical bar (|) character. For example, to attach three files, you could enter:

  > C:\CoverSheet1.pdf|D:\CoverSheet2.doc|C:\CoverSheet3.xls
  > ▶ **Tips**
- You may use this feature in combination with the cover sheets defined on a [Default Message ID Tags]() screen, for a specific client on a [Client Details]() screen or for a client-specific e-mail message on a [Client-specific Message ID Tags]() screen for cover sheets inserted in the **Front** or **Back** of the exploded PDF files. Both cover sheets will be included.
- If you select to include *both* the Default Cover Sheet PDF as a **Separate** PDF attachment and also specify a Cover Sheet PDF as a **Separate** attachment on a Default Message ID Tags screen, Client Details screen or a Client-specific Message ID Tags screen, the default cover sheet attachment will not be included.
  > Note: If you select to include the Default Cover Sheet PDF as a **Separate** attachment [PDF Security Settings]() will be ignored, i.e. the behavior will be the same as when Security Mode is set to **Do Not Secure any PDF document after exploding**.

▶ **File/Email Options**

- **Date-Time Stamp** options specify whether to append the date and time to PDF file names. Appending the date and time may be helpful in organizing multiple versions of the same file.**Suppress DATE_TIME on exploded filename**: If you select this checkbox, the date and time will not be appended to the names of the *exploded* PDF files (i.e. the archived versions). Note that this option does not affect the *attachment* PDF files (i.e. the e-mailed versions).
- **Suppress DATE_TIME on e-mail attachment file**: If you select this checkbox, the date and time will not be appended to the names of the *attachment* PDF files (i.e. the files attached to e-mails). Note that this option does not affect the *exploded* PDF files (i.e. the archived versions).
- **Add leading '_' character to DATE_TIME in File names:** This option is only available if you select one of the above DATE_TIME options. If you select this checkbox, the DATE_TIME appended to exploded file names and attachment file names will be preceded by an underscore (_) character.
- E-mail Address Format options allow you to control the format of the e-mail addresses you are sending to, which is useful for sending e-mails to a fax server.**Standard Format**: This is the default selection and is the best choice for most users. It assumes the e-mail addresses in your <pdfexplode> document tags are in the standard e-mail format such as **<pdfexplode>nancy@pdf-explode.com</pdfexplode>**.
- **Fax Sending 1**: This format can be used with fax servers that expect the e-mail address to be in a format like: **9780001234<pdf-explode@myfaxserver.net>**. The e-mail address in the <pdfexplode> tag should be formatted slightly differently as: **<pdfexplode>9780001234!pdf-explode@myfaxserver.net</pdfexplode>**, where the fax number is followed by an exclamation point (!) and the angle brackets are omitted in the tag.
- **Fax Sending 2**: This format can be used with fax servers that expect the e-mail address to be in a format like: **Fax=9780001234@myfaxserver.net**. The e-mail address in the <pdfexplode> tag should be formatted slightly differently as: **<pdfexplode>Fax9780001234@myfaxserver.net</pdfexplode>**, where the equal sign (=) is omitted; it will be inserted by PDF-eXPLODE before sending.
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**Full Name Format**: This format can be used when you want the recipient's full name to appear in the TO address instead of their e-mail address. For example, if you are sending an e-mail to  Mary Doe in Accounts Payable at pdf-explode.net, you may want the TO address to appear as **Mary Doe(Accounts Payable)** instead of **accounts@pdf-explode.net**. The e-mail address in the <pdfexplode> tag should be formatted as **<pdfexplode>Mary Doe(Accounts Payable)!accounts@pdf-explode.net</pdfexplode>**, where the TO name is followed by an exclamation point (!) and the angle brackets are omitted in the tag. The e-mail will be sent to **Mary Doe(Accounts Payable) <accounts@pdf-explode.net>**.

# Completed Processing Notification

You may configure PDF-eXPLODE to take certain actions upon completion of a print job. You may choose to send an e-mail alert and/or run an external process at the end of processing.

To begin, start PDF-eXPLODE.

▶ **Open Completed Processing Notification**

1. On the **Printer** menu, click **PDF-eXPLODE Options...**.
2. In the **Options List**, click **Completed Processing Notification**.

▶ **E-mail Notification**
You may specify the recipient's e-mail address, the e-mail subject and e-mail message.

- **Send a message at the end of a print run processing**: Select this checkbox to enable e-mail alerts.
- **Attach the current run log with this message:** Select this checkbox to attach a log file for the job that is triggering the e-mail notification. The log is in CSV (comma-separated values) format and includes the exploded PDF file name and path, e-mail address, date and time. This is especially helpful for users in a PDF-eXPLODE Server configuration who do not have access to the log file saved on the server. The file can be opened in a program such as Notepad or Microsoft Excel for viewing. Job logs are stored in a folder named with the Windows user account under the LOGS folder in the PDF-eXPLODE program folder. This file will not be created if no e-mails are generated in the job.
- **To** - allows you to enter one or more e-mail addresses separated by commas (,).
- **Subject** - contains the e-mail subject. You may insert variables within the subject to create a mail merge if you have selected **Use variables in e-mail** on the Variable Settings screen.
- **Message** - contains the e-mail message. You may insert **<<Date>>** and **<<Time>>** where you want PDF-eXPLODE to fill-in the current system date and/or time at the moment the e-mail is sent. You may insert variables within the subject to create a mail merge if you have selected **Use variables in e-mail** on the Variable Settings screen.

   ▶ Tips for Using a Variable

   - When using a variable in the Subject or Message, the value should be a constant, i.e. the variable should contain the same value for all tags in the document since only the last instance is used. This capability is useful for inserting the name of the report, for example.

▶ **Program Processing**
You may specify a process to be executed at the end of processing. You might use this feature to copy, move or delete PDF files. For more information on obtaining a program to copy, move and delete files send an e-mail request to mail@3000ad.com.au.

- **Execute a Batch file or Program at the end of the processing run:** Select this checkbox to enable program processing.
- Select whether to execute the Batch file (.BAT) or Program (.EXE) **Before** or **After** the E-mail Notification.
- Enter the full pathname of the **Program to Run** or click **Browse** to select it.
- Enter any necessary **Program Parameter**, or if the parameter is a filename click **Browse** to select it.
- Click **Test Program** to ensure it works as desired.

   ▶ **Tip**

   - Use the PeXPrintPDF print utility (located in the Program folder) and print a PDF. PeXPrintPDF supports the following command line parameters where the first two parameters are required and the last three are optional:
        -PRINT, PDFpathname [,printername] [,#copies] [,password]
        For example, "C:\Program Files\PDF-eXPLODE\PeXPrintPDF.exe" -PRINT, "C:\Program Files\PDF-eXPLODE\PDFS\PDFeXPLODE.pdf",HP LaserJet 3300 Series PCL 6
   - Omit the printername to use the default printer
   - Omit the # of copies to default to 1 copy
   - If you skip a parameter, include the comma, for example, to print 2 copies to the default printer use:
        "C:\Program Files\PDF-eXPLODE\PeXPrintPDF.exe" -PRINT, "C:\Program Files\PDF-eXPLODE\PDFS\PDFeXPLODE.pdf",,2

**PDF-eXPLODE**

# Logging and Utilities

Logging enables you to audit program operations, identify failed e-mails and diagnose unusual issues. Utilities provide capabilities to backup, view and combine PDF files.
To begin, start PDF-eXPLODE.

▶ **Open Logging and Utilities**

1. On the **Printer** menu, click **PDF-eXPLODE Options...**.
2. In the **Options List**, click **Logging and Utilities**.

▶ **Log Maintenance**

- **Log Program Operations**: Select this checkbox to save a detailed log of the steps taken by PDF-eXPLODE including any error messages, a summary transaction log noting the success or failure of each e-mail and any PDFs that failed to be sent.
- **Log details of e-mails sent via SMTP**: Select this checkbox only if you are having trouble sending e-mails via SMTP and want to log the complete details to help diagnose a problem. Disable this feature when not needed to prevent the log file from becoming excessively large. Thisoptions does not apply when sending e-mail via MAPI, or Outlook.
- Click **View Detailed Log** to display a detailed log of PDF-eXPLODE operations in a Notepad window.  The detailed log contains documents each step taken in exploding and e-mailing a PDF so there will be many lines of information per e-mail.  Close the Notepad window when you have finished viewing or editing the log file.  If you continue using PDF-eXPLODE with a log file window opened, changes will not be reflected - you will need to click **View Detailed Log**  again to see any subsequent changes.

    Note: On PDF-eXPLODE Server installations, for example a Printer Server, you may see multiple user accounts listed. Select the desired user account name and then click **View Detailed Log** to view the log for a particular user

    ▶ **Tips**
- The window may be sized and scrolled to facilitate viewing.
- The log is displayed in chronological order with the most recent operations appearing at the bottom.
- You may edit the log file as desired, for example, you may wish to delete older portions no longer needed or save an archive version and clear it entirely.
- To copy text so you can paste it into another application, select the text, right-click the mouse and click **Copy**.
- For the locations of the PDFeXPLODE.log and PDFeXPLODE.ini files, refer to What's Installed Where.
- For more information on diagnosing problems using the log files, refer to Logging Operations.
- Click **View Failed Mail PDFs** to access PDFs that were not sent in an Explorer window.  This feature will facilitate manually resending PDF files that failed to send.▶ Tips
  - You can manually resend a PDF using an e-mail client program such as Microsoft Outlook.
- Click **Delete Log Entries** to reduce the size of the detailed log file by deleting entries dated ON or BEFORE a selected date. You will be prompted to enter the desired date, where the accepted date format will be displayed (it varies depending on your Windows Regional Options**).**

▶ **Tips**

- The detailed log file can grow quite large over time. Deleting older entries periodically can improve performance when viewing the log file and save disk space.
- You may wish to archive a copy of the detailed log file before deleting entries. You can copy the log file the same way you would copy any file using Windows Explorer.
- For the name and location of the log file refer to What's Installed Where for details.

▶ **PDF File Backups**

- **Don't Create BKP (Master) and BAK (Exploded) Back-up Archive files**: If you select this checkbox, backup copies of the master PDF and exploded PDF files will not be created.
- Click **Delete Backup Files** to remove backup copies of PDF files dated ON or BEFORE a selected date. You will be prompted to enter the desired date, where the accepted date format will be displayed (it varies depending on your Windows Regional Options.) You may enter the desired file path where the files to be deleted are located, or click **Browse** to navigate to the desired file path. You may also select whether to delete _bak or _bkp files. Files named *_bkp.pdf are backup copies of the master PDF and files named *_bak.pdf are copies of exploded PDF files. After making your selections, click **Process** to delete the files and then click **Close** when done.▶ Tips
  - Deleting older files periodically will save disk space.
  - For the default location of PDF files refer to What's Installed Where for details.
-

**Auto Backup of Option File to:** If you select this checkbox, the file containing program options will be copied to the specified location each time changes are saved. The default backup location if none is specified is the same directory in which the program options file resides. For the name and location of the program options file refer to [What's Installed Where](#) for details. You may enter the desired file path where you would like the backup copy to be saved, or click **Browse** to navigate to the desired file path.▶  [Tips](#)

- If you need to maintain the same settings in two different user accounts (e.g. Administrator and SYSTEM), use this feature to propagate the changes to the other user account.

▶ **PDF Viewer**

- Click **Browse** to select a PDF file to view.
- Click **Open PDF** to view the selected PDF.
- You can also use the PeXPDFViewer utility (located in the Program folder) to view a PDF from a [command line](#).

▶ **PDF Utilities**

- **Split PDF**: Use this function to split a PDF that does not have <pdfexplode> tags, resulting in a separate PDF file for each page. Files will be named using their corresponding page number, for example, 0001.pdf, 0002.pdf ... 9999.pdf. You can specify a filename prefix to customize the file names.Enter a **File name prefix**: This is optional and will be pre-pended to file names. For example, enter the word *Page* to create files named Page0001.pdf, Page0002.pdf etc.
- Enter the **Folder path** where you want the spilt pdf files to be saved. Use the **Browse** button to navigate to the desired folder.
- Enter the **File Name & Folder Path** for the input PDF file that you want to split. Use the **Browse** button to navigate to the desired file.
- Click **Split PDFs** to perform the operation.
- Click **Close** when you are finished.

- **Combine PDFs**: Use this function to combine multiple unsecured PDF files into a single PDF, which can then be exploded by running PDF-eXPLODE from a [command line](#), or by printing to PDF-eXPLODE from the PDF Viewer. Using PDF-eXPLODE in this manner will enable you to combine multiple PDF reports and documents into a single e-mail attachment. If you want to create several master PDF files without exploding them so that you can combine them and then explode the combined PDF, disable [Silent Mode](#) and then print to PDF-eXPLODE and select [Create PDF](#).Click **Combine PDFs** to select up to five unsecured PDF files to combine. Note: the PDF files cannot have security applied, i.e. you cannot have an Owner or User password applied.
- Click the **Browse** buttons to select the full pathname to the PDF you want to create (the *output* file) and up to five PDF files you want to combine (the *input* files).
- Click **Combine PDFs** to perform the operation.
- Click **Close** when you are finished.

- **Rotate PDF**: Use this function to rotate landscape-oriented pages within a PDF to portrait orientation (counterclockwise 90 degrees).Enter the **File Name & Folder Path** for the output PDF file that you want to create. Use the **Browse** button to navigate to the desired file.
- Enter the **File Name & Folder Path** for the input PDF file that you want to rotate. Use the **Browse** button to navigate to the desired file.
- Click **Rotate PDFs** to perform the operation.
- Click **Close** when you are finished.

- **Explode & E-mail PDF**: Use this function to explode and e-mail a PDF created by another PDF creator. Note that you can also use a [command line](#) or drag-and-drop a PDF file onto the program window to accomplish the same outcome.Enter the **File Name & Folder Path** for the PDF file that you want to explode and e-mail. Use the **Browse** button to navigate to the desired file.
- Click **Explode & E-mail** to perform the operation.
- Click **Close** when you are finished.

  - **Copy Message ID**: this utility copies a default Message ID to another Message ID, Client ID or a specific Client-Message ID. This is useful when creating specific Client
  i. Copy Message ID: Use this utility to copy a default Message ID to another Message ID, Client ID or a specific Client-Message ID. This is useful when creating specific Client exceptions for a particular Message ID processing.
  ii. Select a Message ID from the Input Message ID dropdown list. If no Message IDs have currently been created, then you cannot proceed with this utility.
  iii. Decide on whether you want to duplicate the Input Message ID to a new (Output) Message ID. You cannot insert the name of an existing Message ID.
  iv. Click the appropriate **Copy To** button to copy the Input Message ID to an Output Client ID or Client-Message ID. You cannot insert the name of an existing Client ID.

v. If copying to a Client-Message ID, you must enter either a new or existing Client ID name.

vi. Click **Start Copying** to run the copy process.

vii. Click **Close** when you are finished.

**TIP**

- Make a copy of a default Message ID to an Output Client-Message ID to enable you to create a specific Client exception as part of a Message ID process run.

  For instance:

    - You are running the "Invoices" Message ID with a single e-mail for each exploded invoice PDF. However one destination email client wishes to receive one email with all invoices attached. Copy the default "Invoices" Message ID as "Invoices" to Client-Message ID text entry field. In the Client ID, show the e-mail destnation address as it shows in the tag.

    - Once you create the copy, go to the Client-Message ID in the Options (under Mail Settings) screen and check the flag Attach multiple exploded PDFs to one e-mail. This means that this client will receive all their Invoices in the "Invoices" Message ID batch attached to one email whereas the rest of the destiation Clients will receive one e-mail for each exploded PDF.

**TIP**

- To refresh the Mail Settings/ Default Message ID menu you will need to exit from the Options screen back to the Print Queue and re-open the Print Options from the Printer menu

▶ **PDF Printer Utility**

Use the PeXPrintPDF print utility (located in the Program folder) to print a PDF from a command line.

# Variable Settings

Variables let you customize e-mail subjects and messages and allow you to generate PDF file names and path names at runtime. Variables give you more control over the content of e-mail messages and help you better organize your PDF documents. If you are printing from a program that provides the ability to perform calculations (such as Crystal Reports, SQL Server Reporting Services, R&R Report Writer, Microsoft Access and Microsoft Excel) you can use formulas to compute the values of the variables.

For example, you might save a person's first name into a variable and begin an e-mail message "Dear <Var1>:" where "<Var1>" would be replaced with a person's first name to produce "Dear John:".  You can also use variables in file and folder names, where you might want to save invoices in folders identified by a customer's name, and have the file name be the invoice number, for example, "C:\Invoices\CompanyA\Invoice_12345.pdf".

PDF-eXPLODE allows for up to nine variables. Variables are passed to PDF-eXPLODE by placing them into the PDF-eXPLODE tag inserted into your document.  The format for including variables in the <pdfexplode> tag is as follows :

      `<pdfexplode>Var1,Var2,Var3,Var4,Var5,Var6%Message ID#ClientID</pdfexplode>`

Variables may be omitted, for example, if you only want to pass variable 2 and variable 4, your tag would be in this format:

      `<pdfexplode>,Var2,,Var4%Message ID#ClientID</pdfexplode>`

**NOTE:** Be careful that your variable values do not inadvertently contain commas because the comma is used to separate variables. For example, you might include a customer name as **Smith, John**, which would be interpreted by PDF-eXPLODE as two variables; the first variable's value is **Smith** and the second variable's value is **John**. A similar problem can occur with numbers when a comma is used as a thousands separator. For example, a customer account number  **1234** may be inadvertently formatted as **1,234**, which would be interpreted by PDF-eXPLODE as two variables; the first variable's value is **1** and the second variable's value is **234**.

If you must include a comma within a variable value, you may enclose the value within accent grave characters, i.e. the backwards single quote character (`) or ASCII character 96, which is usually located on the same key as the tilde (~) to the left of the numeral one (1) key on the keyboard. For example, `` `Smith, John` `` or `` `1,234` `` are permissible values that will preserve the embedded commas.

To begin, [start PDF-eXPLODE](#).
▶ **Open Variable Settings**

    1. On the **Printer** menu, click **PDF-eXPLODE Options...**.
    2. In the **Options List**, click **Variable Settings**.


▶ **File Names**
To use a variable to specify the name of the exploded PDF file, make the following selections.

- Select **Use variable for exploded file name** to enable this feature.
  - Choose where you want the variable to appear in the file name.Choose **Leading** to use the variable as a prefix to the default file name. For example, if the exploded file name is "_Invoice" and the variable value is "9995" then the resulting file name will be "99995_Invoice.pdf".
  - Choose **Trailing** to use the variable as a suffix to the default file name. For example, if the exploded file name is "Invoice_" and the variable value is "9995" then the resulting file name will be "Invoice_9995.pdf".
  - Choose **Full name** to use the variable as the complete file name. For example, if the exploded file name is "Invoice" and the variable value is "9995" then the resulting file name will be "99995.pdf".
    - ▶ **Tips**
  - Note that the default file name is the client id in the <pdfexplode> tag, but may be overridden using the Exploded File Name option on a [Default Message ID Tag](#) screen, [Client Details](#) screen or a [Client-specific Message ID Tag](#) screen.
  - Windows does not permit the following characters to be used in file names: < > : " / \ | ? *
  - Period (.) may not be used as the first character in a file name.
  - PDF-eXPLODE does not permit the following characters to be used in file names: # % @ ~
  - Apply a small font to a <pdfexplode> tag that includes variables because the tag can grow very wide and it must fit on a single line. We recommend using **Times New Roman** font in **6 point** font size.
- **Select the variable to use for the file name:** allows you to choose the variable whose value will be used in the file name. Select **Var1**, **Var2**, **Var3**, **Var4**, **Var5** or **Var6**.


▶ **Sub-Folder Names**
A variable may be used to name the folder in which a PDF file is saved. The designated folder is a sub-folder to the Default Document Path specified on the [General Settings](#) screen, or the file path override specified on a [Default Message ID Tag](#) screen, for a specific client on a [Client Details](#) screen or for a client-specific e-mail message on a [Client-specific Message ID Tag](#) screen.
To use a variable to create a sub-folder in which to save the exploded PDF files:

- Select **Use variable to create a sub-folder** to enable this feature.
- **Select the variable for sub-folder name:** allows you to choose the variable whose value will be used as the complete sub-folder name. Select **Var1**, **Var2**, **Var3**, **Var4**, **Var5** or **Var6**. If you specify a relative pathname, the parent folder must exist at runtime - PDF-eXPLODE will not create it.

- Select **Use ^ character in variable to indicate nested sub-folder** to pass multiple levels of sub-folders in a single variable. The carat (^) takes the place of the backslash (\) as the delimiter since the backslash would produce an invalid temporary file name during processing.

▶ **File Password**

A variable may be used to supply a user password to secure a PDF. If used, a password variable will override any other password settings specified on [Default Message ID Tag](#), [Client Details](#), [Client-specific Message ID Tag](#) or [PDF Security Settings](#). Use **PDF Security Settings** to select desired permissions (for example, Allow Printing). If **Security Mode** is set to **Do not secure any PDF document after exploding** then all permissions will be disallowed.

- Select **Use variable as a PDF password** to enable this feature.
- **Select the variable to use as Password:** allows you to choose the variable whose value will be used as the password. Select **Var1**, **Var2**, **Var3**, **Var4**, **Var5** or **Var6**.
- Enter the **Owner Password**. The owner password is required. It must be entered by a person who has opened a PDF and wants to gain access to, and modify, the document security permissions.

    ▶ **Tips**

    - Use this feature when the password is stored in a database for securing confidential documents such as Payroll direct deposit advice.
    - If you select this feature but do not include a password variable in a document tag, the resulting exploded PDF file will not have security applied (even if you set [Security Mode](#) to **Secure all PDF documents after exploding**).
    - The entire <pdfexplode>...</pdfexplode> tag is used as a temporary file name, therefore do not use any of the following characters in a password variable because Windows does not permit them to be used in file names: < > : " / \ | ? *

▶ **From Address**

A variable may be used as the e-mail from (i.e. return) address. The designated e-mail address is an override to the default **Sender Name** specified on [Mail Settings](#) or the **Sender E-mail** override specified on a [Default Message ID Tag](#) screen, for a specific client on a [Client Details](#) screen or for a client-specific e-mail message on a [Client-specific Message ID Tag](#) screen.

- Select **Use variable as the E-mail FROM/Return Address** to enable this feature.
- **Select the variable for FROM address:** allows you to choose the variable whose value will be used as the complete e-mail FROM address. Select **Var1**, **Var2**, **Var3**, **Var4**, **Var5** or **Var6**.
- Select **Make 'From Address' and 'Return Path/Reply To' same** to set the return path in the internet header to be the same as the from address.
- Note: The FROM address value passed in the variable must be in one of the following formats:An e-mail address, for example, **jsmith@smithcompany.com**
- A sender name followed by exclamation point (!) followed by an e-mail address, for example, **John Smith! jsmith@smithcompany.com**

▶ **Select Variable Usage in E-mail Merge**

You may opt to have PDF-eXPLODE perform a mail merge in the e-mail from address, subject and message using the variables from the PDF-eXPLODE tags in the document being printed.

- Select **Use variables in e-mail** to enable this feature.  Place variable names within angle brackets in your e-mail subject or message where you want their values to appear.  For example, if variable 1 contains an invoice number, type "Invoice #<Var1>" to produce something like "Invoice #12345". An example is given on the program screen.
- You may insert [programming functions](#) within the subject and message to manipulate and format the contents of variables.
- Note: Do not insert a variable in Default Document Title on [General Settings](#) or in Exploded Filename on a [Default Message ID Tag](#) screen, for a specific client on a [Client Details](#) screen or for a client-specific e-mail message on a [Client-specific Message ID Tag](#) screen. as these settings will *not* be replaced with the variable value at runtime.

# PDF Security Settings

PDF Security Settings let you protect the PDF files you create with PDF-eXPLODE. PDF-eXPLODE can protect your PDF documents from unauthorized viewing, copying, sharing, modifying or printing.

By default, all PDF documents created with PDF-eXPLODE do not have security enabled. Security may be applied:

- globally to all exploded PDF files by assigning the same password to every PDF file (see Specify Passwords below),
- globally to all exploded PDF files by assigning an individual password to each PDF using Variables in the PDFeXPLODE tag, which override the settings on this screen,
- on an exception basis to exploded PDF files for specific recipients for whom you create a Client Details screen and select the option labeled **Protect Resulting PDF document**.

PDF-eXPLODE lets you choose security settings for each security-enabled PDF document you create. While it is not necessary to secure your PDF documents, you should consider the purpose for which a document will be used, the sensitivity of the contents and who will be receiving it.
Note: Security is not applied to Cover Sheets that are sent as a separate PDF attachment or to Quick Mail PDF files.
To control access to your PDF files, you enable **encryption**, select the **permissions** you wish to grant and apply **passwords**.
To begin, start PDF-eXPLODE.

▶ **Open PDF Security Settings**

1. On the **Printer** menu, click **PDF-eXPLODE Options...**.
2. In the **Options List**, click **PDF Security Settings**.

▶ **Set Security Mode**
Set a security mode to specify whether and how to apply security to the PDF files created. If you opt to secure PDF files, then you must enter an Owner Password (see below). Note that security applied using variables will override the settings on this screen.

- **Do not secure any PDF document after exploding** offers no security but should be compatible with all PDF viewing programs.
- **Secure all PDF documents after exploding** allows you to secure all documents using the same password, i.e. a global password. This option provides convenience while sacrificing security, since all PDF files will have the same password as entered below. You may override the default passwords specified below for specific documents and clients on a Client Details screen or a Client-specific Message ID Tags screen. Note: The use of password variables in the <pdfexplode> tag takes precedence over these settings.
- **Secure just the PDF documents for the selected clients after exploding** allows for greater security by providing for different passwords to be assigned to different PDF files. You may override the default passwords specified below for specific documents and clients on a Client Details screen or a Client-specific Message ID Tags screen.

▶ **Set Encryption Level**
Encryption allows you to control access to the PDF files generated by PDF-eXPLODE.  If you select to secure PDF files using **Security Mode**, specify whether to use 40 bit or 128 bit encryption.

- 40 bit encryption provides some security but is compatible only with Adobe Acrobat or Reader v4 or below. We recommend not using this setting unless you know you must. Selecting this option will allow you to specify some permissions.
- 128 bit encryption offers the greatest degree of security but is compatible only with Adobe Acrobat or Reader v5.0 or higher. Most users should have v5.0 or higher, so this is the recommended setting for users wanting encryption security. Selecting this option will allow you to specify all available permissions.

▶ **Set Permissions**
Select the permissions you wish to apply to your PDF documents. Permissions for the document can be set separately from access to the document. For instance, with Password Security, it's possible to require different passwords to open (a User Password) and manipulate (an Owner Password) the document, meaning that you can allow one set of users to view the document, and another, smaller set to copy or print the document.

- **Allow Printing** - print the document (possibly not at the highest quality level, depending on whether allow-degraded-printing is also set).  To disallow printing, de-select this permission *and also* the permission labeled **Allow Degraded Printing.**
- **Allow Modify Contents** - modify the contents of the document by operations other than those controlled by Allow Modify Annotations, allow Fill In and Allow Assembly
- **Allow Copy** - copy or otherwise extract text and graphics from the document by operations other than that controlled by Allow Screen Readers

- **Allow Modify Annotations** - add or modify text annotations, fill in interactive form fields and, if Allow Modify Contents is also set, create or modify interactive form fields (including signature fields )
- **Allow Fill In** - fill in existing interactive form fields (including signature fields), even if Allow Modify Annotations is not set
- **Allow Screen Readers** - extract text and graphics (in support of accessibility to disabled users or for other purposes)
- **Allow Assembly** - assemble the document (insert, rotate or delete pages and create bookmarks or thumbnail images), even if Allow Modify Contents is not set
- **Allow Degraded Printing** - when this is set (and allow-printing also is set), printing is limited to a low level representation of the appearance, possibly of degraded quality.  To disallow printing, de-select this permission *and also* the permission labeled **Allow Printing.**

To view permission settings in resulting PDF documents, open a PDF generated by PDF-eXPLODE using Adobe Acrobat or Adobe Reader and select Document Properties from the File menu.  Permission settings appear on the Security dialog window.
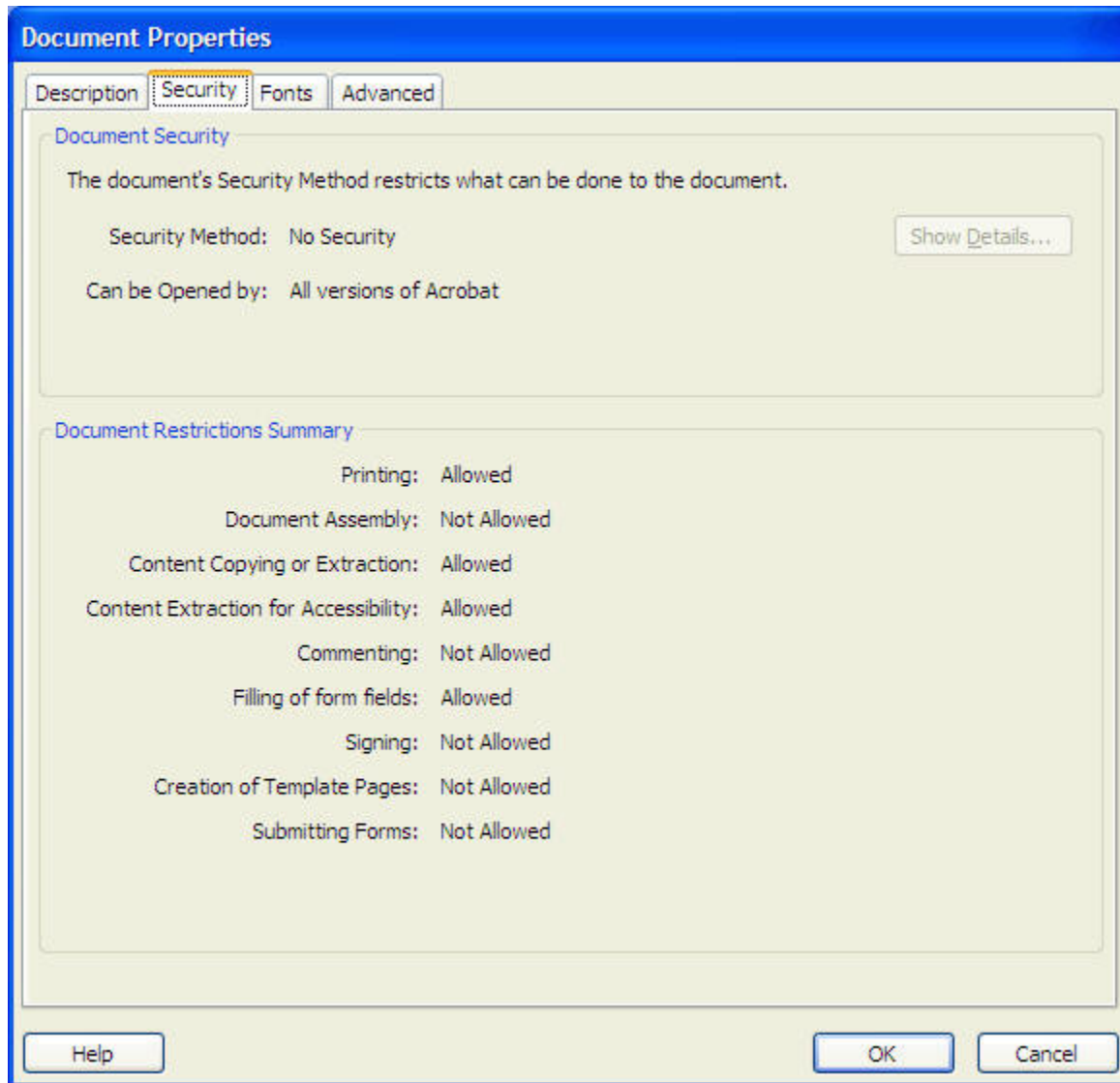


▶ **Specify Passwords**
You can specify two passwords for PDF documents created by PDF-eXPLODE: a User Password and an Owner Password.  The "user" is the person to whom you are sending a PDF and the "owner" is you.  You should specify different passwords for the User and Owner or else a user will have access to change permissions.  You may override these general passwords with passwords specific to an e-mail message defined on a Default Message ID Tag screen, which may be overridden by passwords specific to an e-mail recipient defined on a Client Details screen, which may be overridden by passwords for a client-specific message on a Client-specific Message ID Tags screen.

- User Password if specified, must be entered by a user to open and view a PDF document generated with this password.    User Password must be different than Owner Password to protect the document against users changing the document's permissions.

- Owner Password is required if Encryption Level is set to either 40 bit or 128 bit. If specified, the owner password must be entered by a person who has opened a PDF and wants to gain access to, and modify, the document security permissions.

# Mail Settings

Mail Settings let you configure PDF-eXPLODE to communicate with your e-mail server and construct the default e-mail message.

To begin, start PDF-eXPLODE.

▶ **Open Mail Settings**

1. On the **Printer** menu, click **PDF-eXPLODE Options...**.
2. In the **Options List**, click **Mail**.

▶ **Default E-Mail Setting**

The default e-mail **Subject** and **Message** appear when your e-mails are viewed by recipients.  You can change them each time you send e-mail using PDF-eXPLODE, or you may override the default message for a specific e-mail message on a Default Message ID Tags screen, for a specific client on a Client Details screen or for a client-specific e-mail message on a Client-specific Message ID Tags screen.

- Select **Send e-mail message as HTML** if you want to send e-mail messages in HTML format. Using HTML enables you to format e-mail messages using fonts and images, etc. If you do not select this option, e-mail messages will be sent in plain text format. Note that you can override this setting for a specific e-mail message on a Default Message ID Tags screen, for a specific client on a Client Details screen or for a client-specific e-mail message on a Client-specific Message ID Tags screen. An HTML editor is provided with PDF-eXPLODE, or you may use another editor and specify the file to be used.
- **Subject**: Enter an e-mail Subject. You may insert variables and programming functions within the subject to create a mail merge if you have selected **Use variables in e-mail** on the Variable Settings screen.
- **Message File**: If you selected **Send e-mails as HTML**, enter a full pathname to the file containing the HTML message. To browse to the file that you want to select or create, clear the contents of **Message File** and click **Edit HTML File** (see below). You may insert variables and programming functions within the message to create a mail merge if you have selected **Use variables in e-mail** on the Variable Settings screen.
- **Message Text**: If you selected the Send e-mails as HTML option, the HTML file contents are displayed. If you did not select the Send e-mails as HTML option, you may edit the message text here. You may insert variables and programming functions within the message to create a mail merge if you have selected **Use variables in e-mail** on the Variable Settings screen. You may insert **<<Date>>** and **<<Time>>** where you want PDF-eXPLODE to fill-in the current system date and/or time at the moment the e-mail is sent.

▶ **Exploding Rules**

**Attachment Rules**
Change the default method of attaching each exploded PDF to one e-mail. You can select between No exploded attachment or Multiple exploded attachments to the one email. This will override the default behaviour of one exploded PDF attached to one email.

- **Do NOT attach exploded PDFs to e-mail**: Select this option if you want to use PDF-eXPLODE to do an e-mail blast without the PDF attachments. You can use variables to mail-merge data into the e-mail subject and message.

- **Attach multiple exploded PDFs to one e-mail where the PDFs all have the same destination**: Select this checkbox if you want to send multiple attachments to the same e-mail address. The default behaviour is to send one PDF per e-mail. You can use this feature in combination with variables to name the PDF files so they have distinct names.

**Exploding Method**
Select from the dropdown:

1. **Only pages containing a TAG will be exploded**:

This is the default method where every page must contain a tag. A blank Tag page will be ignored in the exploding process.

> **For example:**
>
> **Example 1:**
> <pdfexplode>mail@3000ad.com.au </pdfexplode>
> Page 1: This is the first tag page text
>
> Page 2 : No Tag on this page

This is intentionally blank

<pdfexplode>info@pdf-explode.com </pdfexplode>
Page 3: This page has a different tag

Page 4 : No Tag on this page
This is intentionally blank

**Result:**
Page 1 will be exploded to Mail@3000ad.com.au.pdf (1 Page PDF)
Page 3 will be exploded to info@pdf-explode.com.pdf (1 Page PDF)

**2. Blank TAG pages are exploded using the previous Tag page:**
Select this option if your document does not contain TAGs on every page. Here the engine will explode the blank TAG page using  the last Tag found on a page immediately prior to the blank Tag page. You can also 'tag' a page again in the batch which will also be picked up and combined with previous pages. The Tag must be the exact same including spaces between the values. For example:

**Example 1:**
<pdfexplode>mail@3000ad.com.au </pdfexplode>
Page 1: This is the first tag page text

Page 2 : No Tag on this page
This is intentionally blank

<pdfexplode>info@pdf-explode.com </pdfexplode>
Page 3: This page has a different tag

**Result:**
Page 1 and 2 will be exploded to Mail@3000ad.com.au.pdf (2 Page PDF)
Page 3 will be exploded to info@pdf-explode.com.pdf (1 Page PDF)

_____

**Example 2:**
<pdfexplode>mail@3000ad.com.au </pdfexplode>
Page 1: This is a tagged page

Page 2 : No Tag on this page
This is intentionally blank

<pdfexplode>info@pdf-explode.com </pdfexplode>
Page 3: This is a different tag

Page 4 : No Tag on this page
This is intentionally blank

<pdfexplode>mail@3000ad.com.au </pdfexplode>
Page 5 : This page is the same Tag as appeared on Page 1

**Result:**
Page 1, 2 and 5 will be exploded to Mail@3000ad.com.au.pdf (3 Page PDF)
Page 3 and 4 will be exploded to info@pdf-explode.com.pdf (2 Page PDF)

_____

**Example 3:**
<pdfexplode>mail@3000ad.com.au </pdfexplode>
Page 1: This is a tagged page

Page 2 : No Tag on this page
This is intentionally blank

info@pdf-explode.com

Page 3: This is a different tag

Page 4 : No Tag on this page
This is intentionally blank

<pdfexplode>mail@3000ad.com.au </pdfexplode>
<pdfexplode>info@pdf-explode.com </pdfexplode>
Page 5 : There are 2 Tags on this page - one the same as Page 1 and the other similar to Page 3

**Result:**
Page 1, 2 and 5 will be exploded to Mail@3000ad.com.au.pdf (3 Page PDF)
Page 3, 4 and 5 will be exploded to info@pdf-explode.com.pdf(3 Page PDF)

▶ **E-Mail Connection Setting**
You can send e-mail using either PDF-eXPLODE (an SMTP client) or through Microsoft Outlook (a **MAPI** client).
    ▶ **Use PDF-eXPLODE (SMTP)**
    To send e-mail using PDF-eXPLODE's SMTP client, you need to tell PDF-eXPLODE your Connection Settings as follows.  After
    supplying the necessary information, click the **Test Connection** button to send a test e-mail to the **Sender Name** e-mail address
    and confirm the settings are correct and working.

- Select **Use PDF-eXPLODE (SMTP)**.
- The **Sender Name** can be whatever name you wish to appear in the **From** field as viewed by recipients of your e-mail.
  Undeliverable e-mails may return error notification e-mails to this address, which can be used to help clean your e-mail list and
  re-send important documents.  Enter a name followed by an e-mail address within angle brackets, for example:

      John Smith <jsmith@smithcompany.com>

- Enter a **Reply To** e-mail address if it is different than the sender name. This setting may be overridden using a variable From
  Address or by setting **Reply To** on a specific Default Message ID Tag, Client Details or a Client-specific Message ID Tag.

The following information usually supplied to you by your organization's e-mail administrator or your Internet Service Provider (ISP):

    1. Name of your **Outgoing Mail SMTP Server.**  This may be entered in one of three formats:DNS Name, for example:
       *smtp.mycompany.com*
    2. IP Address, for example: *192.168.10.25*
    3. Server Name: for example: *smtp_srvr1*
- Your **Sign-on Username**, if you use a web hosting service this will often be your e-mail address (for example:
  *myname@mycompany.com*), whereas if your company has its own e-mail server you may only need to enter your login name
  (for example, *myname*).
- Your **Sign-on Password**.  (The password is not displayed and is encrypted before being saved by PDF-eXPLODE to protect
  your privacy.)
- The **Authentication Type** required by your e-mail server. Select; **None**, **POP**, **Login** or **Plain**.
- The **Port** number used by your e-mail server (usually 25)
- Name of your **Incoming Mail (POP3) Server** (for example *pop.mycompany.com*).  This is only required when you have set
  **Authentication Type** to **POP3**.
- Select **Delay each E-Mail** to set the time delay between sending each e-mail (after the first one is sent) to between 1 and 60
  seconds. This can help prevent errors such as 'Too Many Connections' from occurring when the SMTP (e-mail) server limits the
  number of e-mail that can be sent simultaneously.
- Select a security protocol, either **SSL or TLS** if your e-mail server requires an encrypted (i.e. a secure) connection, for example
  Gmail. TLS security is required where an *explicit* security connection is required (for example, Office 365 cloud-based Microsoft
  Exchange server), or security is set up by PDF-eXPLODE e-mail engine before opening communication with the e-mail server.
  This is sometimes referred to as StartTLS. In contrast to TLS, SSL is an *implicit* connection, which is only established when
  sending a message. In both cases (TLS and SSL) the e-mail message is encrypted.
- Click **Test Connection** to test the e-mail settings and send a test e-mail to the Sender Name.

    ▶ **Use Microsoft Outlook (MAPI)**
    To send e-mail using Microsoft Outlook (a MAPI client) client, you only need to ensure Outlook is installed, set as the default e-mail
    client and configured properly. The following options are available.

- Select **Use Microsoft Outlook (MAPI)**.
-

Select **Send as a DRAFT** to place the e-mail into the Outlook *Drafts* folder. A benefit of doing so is that the Outlook security will not ask for manual confirmation. If you do not select this option, the e-mail will be placed into the *Outbox* folder, which requires clicking **Yes** in response to an Outlook security warning dialog that asks you to confirm mail sending from third party applications.

> Note: This means that PDF-eXPLODE Silent and Very Silent modes will stop processing until receiving a manual response. To maintain continuity of the PDF-eXPLODE processing in silent (unattended) mode, it will be necessary to install a software utility like ClickYES, which will automaticallyclick the Yes button and continue processing in your absence. There are free programs available on the Internet that will automatically click **Yes** in response to the Outlook security warning dialog. Search for "ClickYes", or you may download ClickYes from http://www.3000ad.com.au/ClickYesSetup.exe. For PDF-eXPLODE Server, you'll need ClickYes Pro available at www.contextmagic.com.

- Select **Send FROM address as 'on behalf of'** to specify the FROM e-mail address if you have permission to send messages on behalf of another person. Enter the desired e-mail address in **Sender Name <Sender E-mail Addr>** (see below), or you may override the From address for a specific e-mail message on a Default Message ID Tags screen, for a specific client on a Client Details screen or for a client-specific e-mail message on a Client-specific Message ID Tags screen.
- The **Sender Name <Sender E-mail Addr>** is used in conjunction with **Send FROM address as 'on behalf of'** to specify the FROM e-mail address if you have permission to send messages on behalf of another person. It can be whatever name and e-mail address you wish to appear in the **From** field as viewed by recipients of your e-mail, provided you are permitted to send messages on behalf of that e-mail address. Enter a name followed by an e-mail address within angle brackets, for example:

> John Smith <jsmith@smithcompany.com>

▶ **Tips**

- This is the **From** e-mail address not to be confused with the **Reply-To** e-mail address, which will be the default e-mail address specified in your MAPI client (e.g. Microsoft Outlook) and is also the e-mail address to which undeliverable e-mails may return error notification e-mails.
- If you do not set Microsoft Outlook to **Send immediately when connected**, the e-mail(s) will not be sent and will remain in the **Outbox** folder. You will need to move the e-mails to the **Drafts** folder and open and re-send them and then click **Send/Receive**.

▶ **Exploded File Details**

Set the default name and folder for exploded PDF files. You may override these default settings for a specific e-mail message on a Default Message ID Tags screen, for a specific client on a Client Details screen or for a client-specific e-mail message on a Client-specific Message ID Tags screen.

- **Exploded File Name** will replace the e-mail address in each exploded PDF file name with text of your choice.

  Example: The exploded PDF files created by PDF-eXPLODE are named according to the e-mail recipient and, optionally, the date and time of creation. For example, an e-mail sent to nancy@pdf-explode.com on May 28, 2007 at 1:23 PM will have an attachment PDF file named:

  > nancy@pdf-explode.com070528_132300.pdf

  If you enter **Invoice** in this field then the resulting attachment PDF filename will be:

  > Invoice070528_132300.pdf

  To remove the date and time from PDF filenames, use the options **Don't add DATE_TIME to exploded filename** and **Don't add DATE_TIME to e-mail attachment file**, which are located on the General Settings screen. Following the example above, these options enable you to set the e-mailed and archived filenames to: Invoice.pdf

- **Exploded File Path** allows you to select a folder where exploded PDF files will be saved (i.e. archived). Type the desired pathname (e.g. C:\Documents and Settings\Nancy\My Documents\Archived PDF-eXPLODE Files) or click **Browse** to locate and select the desired path without typing it. ▶ Tips
  - Do not insert variables (for example, <var1>) or keywords (for example <date>) into the exploded file name or exploded file path. Windows does not allow the use of angle bracket characters (<>) in file names.
  - Windows does not permit the following characters to be used in file names: < > : " / \ | ? *

Click **Save** to save your settings.
On the **Printer** menu, click **Exit** to close PDF-eXPLODE.

# Default Message ID Tags

Default Message ID Tags allow you to specify whether a particular type of document should be printed, e-mailed or both.  If e-mail is selected, you may also define the subject and message. For example, you could define a Default Message ID Tag "Invoice" to have a default e-mail subject and message applied to all of the invoices you e-mail. In addition, you can specify the PDF file name, path name and security passwords.
You may override the default message settings by creating a Client-specific Message ID Tag with the same name.
To begin, start PDF-eXPLODE.

▶ **Open Default Message ID Tags**

1. On the **Printer** menu, click **PDF-eXPLODE Options…**.
2. In the **Options List**, click the plus sign (+) to the left of **Mail Settings**.
3. Click the plus sign (+) to the left of **Default Message ID Tags**.

▶ **Create a Default Message ID Tag**

1. If there are no existing message ID tags, click **New Message ID**.
   -or-
   If there are existing message ID tags, click any existing message ID tag.
2. Click the button labeled **New**.
   - Complete the following fields:**Message ID** is the tag or name you use to identify this set of options in the PDF-eXPLODE tag inserted into your report or document. The Message ID may not include any spaces. Do not use a message id like PRN, which results in PDF-eXPLODE trying to create a file with an invalid filename. The following device names are reserved by Windows and cannot be used as a filename: CON, PRN, AUX, NUL, COM1, COM2, COM3, COM4, COM5, COM6, COM7, COM8, COM9, LPT1, LPT2, LPT3, LPT4, LPT5, LPT6, LPT7, LPT8, and LPT9.
   - Select **Apply E-Mail Notification** to receive an e-mail notification (called a "read receipt") when a recipient reads an e-mail sent by PDF-eXPLODE. You must also choose **Notify me on Read** on the General Settings screen for this option to take effect. Note that not all e-mail servers support this option and also a recipient may optionally deny sending a read notification.
   - Select **Apply E-Mail Flags** to set the Importance and Sensitivity flags specified on the General Settings screen. Note that some e-mail clients, such as Outlook Express, do not display all of the e-mail flags.
   - Select **Send e-mails as HTML** to format e-mail messages using HTML. Using HTML enables you to format e-mail messages using fonts and images, etc. If you do not select this option, e-mails will be sent as text (i.e. without formatting such as fonts, etc.) An HTML editor is provided with PDF-eXPLODE, or you may use another editor and specify the file to be used. The Message ID may not include any spaces.
   - Choose **Print** if you want to print documents. Note: If security is applied to a PDF then printing will not occur. Only one copy may be printed.Choose **ONLY (don't E-Mail)** to print documents with this message ID but not e-mail them.
     -or-
     Choose **ALSO ( print and E-Mail)** to print in addition to e-mailing the documents.
   - Select a printer from the dropdown list of available printers.
   - Select the number of copies, which defaults to 1.

      ▶ **Tips**
   - Use Print Only in combination with Variables when you need to e-mail some documents and print others, based on whether you have the recipient's e-mail address in your database. For example, you may be e-mailing invoices but need to print and mail hard-copy invoices to customers who do not have an e-mail address. You could use a formula in your report to conditionally insert into the <pdfexplode> tag a Message ID whose purpose is to Print Only for those customers without an e-mail address. Customers with e-mail addresses would have a different Message ID inserted into their <pdfexplode> tag whose purpose is to specify the e-mail subject and message.
   - Use Print Also when you want to send documents by e-mail but also need to keep a hard-copy for your physical files.

      ▶ **Message ID Configuration**
         ▶ **E-mail Setting**

   - **Sender E-mail** can be filled in if you want to override the default sender e-mail address specified on the Mail Settings screen.  The **Sender Name** can be   whatever name you wish to appear in the **From** field as viewed by recipients of your e-mail.  Undeliverable e-mails may return error notification e-mails to this address, which can be used to help clean your e-mail list and re-send important documents.  Enter a name followed by an e-mail address within angle brackets, for example:John Smith <jsmith@smithcompany.com>

**PDF-eXPLODE**

As an alternative to entering sender e-mail address here, a [variable](#) may be used to provide the sender e-mail address. For example, if the e-mail address is contained in variable 3, enter **<var3>**.

- Enter a **Reply To** e-mail address if it is different than the sender name. This setting may be overridden using a variable [From Address](#) or by setting **Reply To** on [Client Details](#) or a [Client-specific Message ID Tag](#).
- **CC** can be checked to send a copy of each e-mail to one or more e-mail recipients.  Multiple CC e-mail addresses must be separated with a comma (,) or semicolon (;). Unlike BCC, recipients will see each other's e-mail addresses.
- **BCC** can be checked to send a blind copy of each e-mail to one or more e-mail recipients.  Multiple BCC e-mail addresses must be separated with a comma (,) or semicolon (;). Unlike CC, BCC recipients will not see each other's e-mail address.
- **Subject** is the subject that appears on the e-mail when received by your clients. You may insert variables and [programming functions](#) within the subject to create a mail merge if you have selected **Use variables in e-mail** on the [Variable Settings](#) screen.
- **Message File** should contain a full pathname to the file containing the HTML message if you selected the Send e-mails as HTML option. If you are sending e-mails in text format, leave this field blank. To browse to the file that you want to select, clear the contents of **Message File** and click **Edit HTML File** (see below). You may insert variables and [programming functions](#) within the message to create a mail merge if you have selected **Use variables in e-mail** on the [Variable Settings](#) screen.
- **Message** is the message that will appear in the body of the e-mail received by your clients. You may insert variables and [programming functions](#) within the message to create a mail merge if you have selected **Use variables in e-mail** on the [Variable Settings](#) screen. You may insert **<<Date>>** and **<<Time>>** where you want PDF-eXPLODE to fill-in the current system date and/or time at the moment the e-mail is sent.
- If you are sending e-mails in text format, click **Edit Text** to enlarge the area for editing the message, and then click **Update** to save the changes or **Cancel** to discard any changes.
- If you are sending e-mails in HTML format, click **Edit HTML File** to use the PDF-eXPLODE [HTML Editor](#) to edit the HTML file specified in Message File, or to create a new HTML file if the Message File option is blank. You may optionally use another HTML editor and specify the **Message File** above.

  ▶ **Exploded File**
  Set the default name and folder for exploded PDF files, and options for inserting a cover page. These settings override those specified on the [Mail Settings](#) screen.
- **File Name** will replace the e-mail address in each exploded PDF file name with text of your choice.

  Example: The exploded PDF files created by PDF-eXPLODE are named according to the e-mail recipient and, optionally, the date and time of creation.  For example, an e-mail sent to nancy@pdf-explode.com on January 28, 2009 at 1:23 PM will have an attachment PDF file named:

  nancy@pdf-explode.com090128_132300.pdf

  If you enter **Invoice** in this field then the resulting attachment PDF filename will be:

  Invoice090128_132300.pdf

  After being e-mailed, the exploded PDF filename will be the same unless you select [Suppress DATE_TIME on exploded filename](#), in which case the filename will be:
  Invoice.pdf
- **File Path** allows you to select a folder where exploded PDF files will be saved (i.e. archived).  Type the desired pathname (e.g. C:\Documents and Settings\Nancy\My Documents\Archived PDF-eXPLODE Files) or click **Browse** to locate and select the desired path without typing it.▶ [Tips](#)
  - Do not insert variables (for example, <var1>) or keywords (for example <date>) into the exploded file name or exploded file path as PDF-eXPLODE does not merge any variable Database values from the tag into this field. The name you use here is taken as a lieral in the filename and Windows does not allow the use of angle bracket characters (<>) in file names.
  - Windows does not permit the following characters to be used in file names: < > : " / \ | ? *
- **Cover Sheet (CS) Fixed** specifies whether to insert an existing PDF file into each exploded PDF, and specifies the full pathname to the selected PDF.  (To specify the coversheet file name in a variable in the <pdfexplode> tag, see the option for CS Variable below.) The selected PDF may be any number of pages. Use this feature for such applications as including a generic newsletter or promotion in every PDF file created by PDF-eXPLODE. Note: This cover sheet is *in addition to* any cover sheet defined in [General Settings](#). PDF-eXPLODE will not insert a cover sheet if the exploded PDF file is password protected. If the cover sheet is attached separately, it can be any file type (i.e. not restricted to PDF.)
- Select the checkbox to enable insertion of the cover sheet, or de-select the checkbox to disable this feature.
- Select whether to position the cover sheet file in the **Front** or **Back** of the exploded PDF file or as a **Separate** attachment. If you select Front or Back, the cover sheet file must be a PDF. If you select Separate, the file can be any type.

- Click **Browse** to navigate to the desired coversheet file name. If you select to attach the cover sheet as a separate file, you can select multiple files by separating the filenames with a vertical bar (|) character. For example, to attach three files, you could enter:

  C:\CoverSheet1.pdf|D:\CoverSheet2.doc|C:\CoverSheet3.xls

- ▶ **Tips**
  - You may use this feature in combination with the the Default Cover Sheet PDF defined in <u>General Settings</u> for cover sheets inserted in the **Front** or **Back** of the exploded PDF files. Both cover sheets will be included.
  - If you select to include *both* the Default Cover Sheet PDF as a **Separate** attachment and also specify a Cover Sheet PDF as a **Separate** attachment on a Default Message ID Tags screen, Client Details screen or a Client-specific Message ID Tags screen, the default cover sheet attachment will not be included.

    ▶ **Attachment**
    Change the default method of attaching each exploded PDF to one e-mail. You can select between No exploded attachment or Multiple exploded attachments to the one email. This will override the default behaviour of one exploded PDF attached to one email. You can optionally elect to rotate any exploded PDF page which has a landscape orientation in the PDF, back to portrait. This is necessary to prevent an exploded landscape PDF pagewidth being truncated from: 11 inches to 8.5 inch (Letter) or 11.7 inches to 8.29 inch (A4), when fed through an electronically transmitted fax.

- **Do NOT attach exploded PDFs to e-mail**: Select this option if you want to use PDF-eXPLODE to do an e-mail blast without the PDF attachments. You can use <u>variables</u> to mail-merge data into the e-mail subject and message. Plus, you can use the cover sheet feature (see below) to include a generic attachment on every e-mail.
- **Attach multiple exploded PDFs to one e-mail where the PDFs all have the same destination**: Select this checkbox if you want to send multiple attachments to the same e-mail address. The default behavior is to send one PDF per e-mail. You can use this feature in combination with <u>variables</u> to name the PDF files so they have distinct names.
- **Rotate Landscape pages to Portrait in the exploded PDF:** Select this checkbox to ensure landscape oriented pages are not cut off along the width when sending through a fax server. Pages are not reformatted - they are rotated counterclockwise 90 degrees. Portrait-oriented pages are not affected by this option.

    ▶ **Variable**
    Use this feature to add cover sheets that are customised to each exploded PDF. You could for example, add a PDF timsheet for each exploded Paystub (aka Payslip) when sending employees their pay details. Each variable file name in the tag must be just a filename and extension. For example: **Mark.PDF**. You can add multiple attachments like this: **Mark.PDF&Mark1.XLS**. Files shown in the tag must be saved to the path shown at '**Variable File Path**'.

- Select **Insert Coversheet from Variable** to allow the name of a cover sheet (i.e. any related document to be attached to the same e-mail as the exploded PDF) to be specified in a <u>variable</u>. The file name is only the name of the file, not the complete path (see below).
- **Coversheet position in the exploded file**: Select whether to position the cover sheet file in the **Front** or **Back** of the exploded PDF file or as a **Separate** attachment. If you select Front or Back, the cover sheet file must be a PDF. If you select Separate, the file can be any type.
- **Select the variable for Coversheet attachment** that will contain the name of the coversheet file.
- Enter the **Variable File Path** where the coversheet file is saved.


▶ **PDF Security**

- Select **Protect Exploded PDF** to enable security and enter the passwords described below.
- **User Password** is a general password for viewing documents sent with this message that is applied to all clients you have specified to receive protected PDF files. You may override this password for a specific client on a <u>Client Details</u> screen or on a <u>Client-specific Message ID Tags</u> screen. User Password must be different than Owner Password to protect the document against users changing the document's permissions.
- **Owner Password** is a general password for manipulating permissions in documents sent with this message that is applied to all clients you have specified to receive protected PDF files. You may override this password for a specific client on a Client Details screen or on a Client-specific Message ID Tags screen.


Click **Apply** to save your changes and remain in PDF-eXPLODE Options. -or-
Click **Save** to save your changes and exit PDF-eXPLODE Options. -or-
Click a different option in the Options List on the left to discard changes and remain in PDF-eXPLODE Options. -or-
Click **Cancel** to discard unsaved changes and exit PDF-eXPLODE Options.

**PDF-eXPLODE**

## ▶ Edit a Default Message ID Tag

- Click an existing message ID.Click **Edit**.
- Make your desired changes.
- Click **Apply** to save your changes and remain in PDF-eXPLODE Options.
    -or-
    Click **Save** to save your changes and exit PDF-eXPLODE Options.
    -or-
    Click **Cancel** to discard unsaved changes and exit PDF-eXPLODE Options.

## ▶ Delete a Default Message ID Tag

- Click an existing message ID.Click **Remove**.
- Click **Yes** to confirm the deletion or **No** to cancel.

## ▶ Rename a Default Message ID Tag

1. To rename a message ID you must delete it and re-create it.

# Client-specific Message ID Tags

Client-specific Message ID Tags allow you to define the subject and message specific to both a particular type of document *and* a specific client. For example, you could define a Default Message ID Tag named "Invoice" and, in addition, define a Client-specific Message ID Tags named "Special Invoice" to send to clients requiring special attention.  The Client-specific Message ID Tags override the Default Message ID Tag screen and the Client Details screen.
To begin, start PDF-eXPLODE.

▶ **Open Client-specific Message ID Tags**

1. On the **Printer** menu, click **PDF-eXPLODE Options...**.
2. In the **Options List**, click the plus sign (+) to the left of **Mail Settings**.
3. Click the plus sign (+) to the left of **Clients**.
4. Click the plus sign (+) to the left of the specific client for whom you want to add a client-specific e-mail message.

▶ **Create a Client-specific Message ID Tag**

1. If there are no existing message ID tags, click **New Message ID**.

   -or-

   If there are existing message ID tags, click any existing message ID tag.
2. Click the button labeled **New**.
3. Complete the following fields:▶ Client Details
   - **Client ID or E-mail Address** is a displayed for reference only.
   - **Message ID** is the client-specific Message ID tag used to identify this set of options in the PDF-eXPLODE tag inserted into your report or document. The Message ID may not include any spaces.
   - Select **Apply E-Mail Notification** to receive an e-mail notification (called a "read receipt") when a recipient reads an e-mail sent by PDF-eXPLODE. You must also choose **Notify me on Read** on the General Settings screen for this option to take effect. Note that not all e-mail servers support this option and also a recipient may optionally deny sending a read notification.
   - Select **Apply E-Mail Flags** to set the Importance and Sensitivity flags specified on the General Settings screen. Note that some e-mail clients, such as Outlook Express, do not display all of the e-mail flags.
   - Select **Send e-mails as HTML** to format e-mail messages using HTML. Using HTML enables you to format e-mail messages using fonts and images, etc. If you do not select this option, e-mails will be sent as text (i.e. without formatting such as fonts, etc.) An HTML editor is provided with PDF-eXPLODE, or you may use another editor and specify the file to be used.
   - Choose **Print** if you want to print documents. Note: If security is applied to a PDF then printing will not occur. Only one copy may be printed.Choose **ONLY (don't E-Mail)** to print documents with this message ID but not e-mail them
      -or-
      Choose **ALSO ( print and E-Mail)** to print in addition to e-mailing the documents.
   - Select a printer from the dropdown list of available printers.
   - Select the number of copies, which defaults to 1.

      ▶ **Client Specific Message ID Configuration**
         ▶ **E-mail Setting**
      - **Sender E-mail** can be filled in if you want to override the default sender e-mail address specified on the Mail Settings screen.  The **Sender Name** can be whatever name you wish to appear in the **From** field as viewed by recipients of your e-mail.  Undeliverable e-mails may return error notification e-mails to this address, which can be used to help clean your e-mail list and re-send important documents.  Enter a name followed by an e-mail address within angle brackets, for example:John Smith <jsmith@smithcompany.com>
               As an alternative to entering sender e-mail address here, a variable may be used to provide the sender e-mail address. For example, if the e-mail address is contained in variable 3, enter **<var3>**.
   - Enter a **Reply To** e-mail address if it is different than the sender name. This setting may be overridden using a variable From Address.
   - **CC** can be checked to send a copy of each e-mail to one or more e-mail recipients.  Multiple CC e-mail addresses must be separated with a comma (,) or semicolon (;). Unlike BCC, recipients will see each other's e-mail addresses.
   - **BCC** can be checked to send a blind copy of each e-mail to one or more e-mail recipients.  Multiple BCC e-mail addresses must be separated with a comma (,) or semicolon (;). Unlike CC, BCC recipients will not see each other's e-mail address.
   - **Subject** is the subject that appears on the e-mail when received by your clients. You may insert variables and programming functions within the subject to create a mail merge if you have selected **Use variables in e-mail** on the Variable Settings screen.
   - **Message File** should contain a full pathname to the file containing the HTML message if you selected the Send e-mails as HTML option. If you are sending e-mails in text format, leave this field blank. To browse to the file that you want to select,

clear the contents of **Message File** and click **Edit HTML File** (see below). You may insert variables and programming functions within the message to create a mail merge if you have selected **Use variables in e-mail** on the Variable Settings screen.

- **Message** is the message that will appear in the body of the e-mail received by your clients. You may insert variables and programming functions within the message to create a mail merge if you have selected **Use variables in e-mail** on the Variable Settings screen. You may insert **<<Date>>** and **<<Time>>** where you want PDF-eXPLODE to fill-in the current system date and/or time at the moment the e-mail is sent.
- If you are sending e-mails in text format, click **Edit Text** to enlarge the area for editing the message, and then click **Update** to save the changes or **Cancel** to discard any changes.
- If you are sending e-mails in HTML format, click **Edit HTML File** to use the PDF-eXPLODE HTML Editor to edit the HTML file specified in Message File, or to create a new HTML file if the Message File option is blank. You may optionally use another HTML editor and specify the **Message File** above.

  ▶ **File Details**
  Set the default name and folder for exploded PDF files, and options for inserting a cover page. These settings override those specified on the Mail Settings screen.

- **Do NOT attach exploded PDFs to e-mail**: Select this option if you want to use PDF-eXPLODE to do an e-mail blast without the PDF attachments. You can use variables to mail-merge data into the e-mail subject and message. Plus, you can use the cover sheet feature (see below) to include a generic attachment on every e-mail.
- **Rotate Landscape pages to Portrait in the exploded PDF:** Select this checkbox to ensure landscape oriented pages are not cut off along the width when sending through a fax server. Pages are not reformatted - they are rotated counterclockwise 90 degrees. Portrait-oriented pages are not affected by this option.
- **File Name** will replace the e-mail address in each exploded PDF file name with text of your choice.

    Example: The exploded PDF files created by PDF-eXPLODE are named according to the e-mail recipient and, optionally, the date and time of creation.  For example, an e-mail sent to nancy@pdf-explode.com on January 28, 2009 at 1:23 PM will have an attachment PDF file named:

    nancy@pdf-explode.com090128_132300.pdf

    If you enter **Invoice** in this field then the resulting attachment PDF filename will be:

    Invoice090128_132300.pdf

    After being e-mailed, the exploded PDF filename will be the same unless you select Suppress DATE_TIME on exploded filename, in which case the filename will be:

    Invoice.pdf

- **File Path** allows you to select a folder where exploded PDF files will be saved (i.e. archived).  Type the desired pathname (e.g. C:\Documents and Settings\Nancy\My Documents\Archived PDF-eXPLODE Files) or click **Browse** to locate and select the desired path without typing it. ▶ Tips
  - Do not insert variables (for example, <var1>) or keywords (for example <date>) into the exploded file name or exploded file path. Windows does not allow the use of angle bracket characters (<>) in file names.
  - Windows does not permit the following characters to be used in file names: < > : " / \ | ? *
- **Cover Sheet (CS) Fixed** specifies whether to insert an existing PDF file into each exploded PDF, and specifies the full pathname to the selected PDF.  (To specify the coversheet file name in a variable in the <pdfexplode> tag, see the option for CS Variable below.) The selected PDF may be any number of pages. Use this feature for such applications as including a generic newsletter or promotion in every PDF file created by PDF-eXPLODE. Note: This cover sheet is *in addition to* any cover sheet defined in General Settings. PDF-eXPLODE will not insert a cover sheet if the exploded PDF file is password protected. If the cover sheet is attached separately, it can be any file type (i.e. not restricted to PDF.)
- Select the checkbox to enable insertion of the cover sheet, or de-select the checkbox to disable this feature.
- Select whether to position the cover sheet file in the **Front** or **Back** of the exploded PDF file or as a **Separate** attachment. If you select Front or Back, the cover sheet file must be a PDF. If you select Separate, the file can be any type.
- Click **Browse** to navigate to the desired coversheet file name. If you select to attach the cover sheet as a separate file, you can select multiple files by separating the filenames with a vertical bar (|) character. For example, to attach three files, you could enter:

    C:\CoverSheet1.pdf|D:\CoverSheet2.doc|C:\CoverSheet3.xls

- ▶ **Tips**
  - You may use this feature in combination with the the Default Cover Sheet PDF defined in General Settings for cover sheets inserted in the **Front** or **Back** of the exploded PDF files. Both cover sheets will be included.
  - If you select to include *both* the Default Cover Sheet PDF as a **Separate** attachment and also specify a Cover Sheet PDF as a **Separate** attachment on a Default Message ID Tags screen, Client Details screen or a Client-specific Message ID Tags screen, the default cover sheet attachment will not be included.

      ▶ **Variable**

- Select **Insert Coversheet from Variable** to allow the name of a cover sheet (i.e. any related document to be attached to the same e-mail as the exploded PDF) to be specified in a [variable](variable). The file name is only the name of the file, not the complete path (see below).
- **Coversheet position in the exploded file**: Select whether to position the cover sheet file in the **Front** or **Back** of the exploded PDF file or as a **Separate** attachment. If you select Front or Back, the cover sheet file must be a PDF. If you select Separate, the file can be any type.
- **Select the variable for Coversheet attachment** that will contain the name of the coversheet file.
- Enter the **Variable File Path** where the coversheet file is saved.
  - ▶ **PDF Security**
- Select **Protect Exploded PDF** to enable security and enter the passwords described below.
- **User Password** is a general password for viewing documents sent with this message that is applied to all clients you have specified to receive protected PDF files.  You may override this password for a specific client on a [Client Details](Client Details) screen or on a [Client-specific Message ID Tags](Client-specific Message ID Tags) screen.  User Password must be different than Owner Password to protect the document against users changing the document's permissions.
- **Owner Password** is a general password for manipulating permissions in documents sent with this message that is applied to all clients you have specified to receive protected PDF files.  You may override this password for a specific client on a Client Details screen or on a Client-specific Message ID Tags screen.


1. Click **Apply** to save your changes and remain in PDF-eXPLODE Options.
   - -or-
   Click **Save** to save your changes and exit PDF-eXPLODE Options.
   - -or-
   Click a different option in the Options List on the left to discard changes and remain in PDF-eXPLODE Options.
   - -or-
   Click **Cancel** to discard unsaved changes and exit PDF-eXPLODE Options.


▶ **Edit a Client-specific Message ID Tag**

1. Click an existing message ID.
2. Click **Edit**.
3. Make your desired changes.
4. Click **Apply** to save your changes and remain in PDF-eXPLODE Options.
   - -or-
   Click **Save** to save your changes and exit PDF-eXPLODE Options.
   - -or-
   Click **Cancel** to discard unsaved changes and exit PDF-eXPLODE Options.


▶ **Delete a Client-specific Message ID Tag**

1. Click an existing message ID.
2. Click **Remove**.
3. Click **Yes** to confirm the deletion or **No** to cancel.


▶ **Rename a Client-specific Message ID Tag**

- To rename a message ID you must delete it and re-create it.

![PDF-eXPLODE logo]

# HTML Editor

HTML Editor enables you to create e-mail messages formatted in HTML, allowing you to use fonts, colors, images, etc. You may optionally use another HTML editor and specify the HTML file name in Default E-Mail Settings, for a specific type of mailing on a Default Message ID Tags screen, for a specific client on a Client Details screen or for a client-specific e-mail message on a Client-specific Message ID Tags screen.

▶ **Basic Editing Steps**

1. To begin, click **Edit HTML File**.
2. If you have not yet specified a **Message File**, the Open dialog is displayed. Navigate to the desired folder and enter the name of the file you would like to create and click **Open**. If you omit a file name extension, it will default to **.html**.
3. Edit and format the message using the toolbar buttons (explained below) to enter HTML commands.
4. When you are finished editing, click the **Save** button or select **Save** from the **File** menu to save your changes.
5. Select **Close** from the **File** menu to return to PDF-eXPLODE.

▶ **Toolbar Buttons**

The toolbar buttons display a tooltip when you hover the mouse over the button. Following is a description of each button in the order they appear, with subheads to reflect the button groupings. You may insert variables within the message to create a mail merge if you have selected **Use variables in e-mail** on the Variable Settings screen. For example, if you want to personalize a message with the recipient's first name, which is in variable 4, you could enter **Dear <var4>:**.

**File**

- **Save**: To save the HTML you are editing, click **Save** or press **CTRL+S**.
- **Preview**: To preview the HTML message as it will appear in the e-mail message, click **Preview**. Click **Preview** again to continue editing.

**Edit**

- **Cut**: To remove text and save it to the Windows Clipboard, highlight the text and click **Cut** or press **CTRL+X**.
- **Copy**: To copy text to the Windows Clipboard, highlight the text and click **Copy** or press **CTRL+C**.
- **Paste**: To paste the contents of the Windows Clipboard at the cursor location, click **Paste** or press **CTRL+V**.
- **Delete**: To delete a portion of text, highlight the text and click **Delete** or press **CTRL+X**.
- **Undo**: To undo the last change, click **Undo** or press **CTRL+Z**.
- **Redo**: To redo the last undone change click **Redo** or press **CTRL+Y**.
- **Find**: To find text, click **Find** or press **CTRL+F** and enter the text to search for. To find the next instance, press **F3**.

**Emphasis**
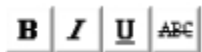
- **Bold**: To add bold emphasis to a portion of text, highlight the text and click **Bold** or press **CTRL+B**.
- **Italic**: To italicize a portion of text, highlight the text and click **Italic** or press **CTRL+I**.
- **Underline**: To underline a portion of text, highlight the text and click **Underline** or press **CTRL+U**.
- **Strikethrough**: To strike out a portion of text, highlight the text and click **Strikethrough**.

**Insert**

- **Insert Paragraph**: To insert a paragraph at the cursor location, click **Insert Paragraph** or press **CTRL+P** and begin typing.
- **Insert image:** To insert an image at the cursor location, such as a logo or photo, click Insert image and enter a URL for the desired image if you wish to link to a web image. Alternatively, you can select an image on your local computer hard drive by clicking the BROWSE button to locate the file. This file-path will remain a link in the HTML file but converted to an embedded image at the time of e-mail sending.

- **Insert Web address link**: To insert a link to a web address at the cursor location, click **Insert Web address link** and enter the URL.
- **Insert E-mail address link**: To insert a mail-to link at the cursor location, click **Insert E-mail address link** and enter an e-mail address.
  - **Insert Quick Text**: You can create and insert named blocks of text using the Quick Text feature. To create, edit or delete a Quick Text, click **Insert Quick Text** to open the Quick Text dialog. To create a Quick Text, enter a **Name** and **Text** and then click **Add**.
  - To edit a Quick Text, select a Quick Text in the list, edit **Text** and click **OK**.
  - To delete a Quick Text, select a Quick Text in the list and click **Delete**.
  - To add a Quick Text to the **Insert Quick Text** dropdown list, select a Quick Text in the list and click **Favorite**.
- To insert a Quick Text at the cursor location, click **Insert Quick Text**, select the desired name and click **Insert**.
- To insert a Favorite Quick Text at the cursor location, click the dropdown arrow next to **Insert Quick Text** and select the desired name.
- **Insert Heading**: You can create headings up to six levels deep. To insert a heading at the cursor location, click the dropdown arrow next to **Insert Heading** and select a heading level. Then type the heading.
- To insert another heading at the same level you can just click **Insert Heading** (not the dropdown arrow) as a shortcut.
- To format existing text as a heading, highlight the text and click the dropdown arrow next to **Insert Heading** to select a heading level, or click Insert Heading to select the current heading level.

**Font**

- **Select Font**: To apply a font to a portion of text, highlight the test and select a font name from the dropdown list.
- **Select Font Size**: To apply a font size to a portion of text, highlight the test and select a size name from the dropdown list. You can select a relative size by selecting a numbers preceded by a minus (-) or plus (+) sign, or an absolute point size by selecting a number without a leading sign. A relative size will make it the specified number of point sizes smaller (-) or larger (+) than the size of the preceding text.
- **Select Font Color**: To apply a color to a portion of text, highlight the test and select a color or define a custom color.

**Alignment**
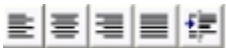
- **Align Left**: To left-align a paragraph, highlight the paragraph (beginning with <p> and ending with </p>) and click **Align Left**.
- **Align Center**: To center a paragraph, highlight the paragraph (beginning with <p> and ending with </p>) and click **Align Center**.
- **Align Right**: To right-align a paragraph, highlight the paragraph (beginning with <p> and ending with </p>) and click **Align Right**.
- **Justify**: To justify a paragraph, highlight the paragraph (beginning with <p> and ending with </p>) and click **Justify**.
- **Indent Text**: To indent a block of text, highlight the text and click **Text Indent**.

**Organization**

- **Unordered List**: To insert a bulleted list at the cursor location, click **Unordered List**.
- **Ordered List**: To insert a numbered list at the cursor location, click **Ordered List**.
- **Insert New List Item**: To insert a new item into an unordered or ordered list, click **Insert New List Item**.
- **Horizontal Line**: To insert a horizontal rule at the cursor location, click **Horizontal Line**.

**Other**

- You can use programming functions to manipulate and format variables within an e-mail subject or message if mail-merge is enabled.

▶ **Keyboard Shortcuts**

| Key | Function |
| --- | --- |
| CTRL+A | Select all text |
| CTRL+B | Apply bold to selected text |
| CTRL+C | Copy to clipboard |
| CTRL+F | Find |
| CTRL+I | Apply italics to selected text |
| CTRL+P | Insert paragraph |

| | |
|---|---|
| CTRL+S | Save HTML file |
| CTRL+X | Cut selected text |
| CTRL+V | Paste from clipboard |
| CTRL+Y | Redo last undone change |
| CTRL+Z | Undo last change |
| F1 | Display help |
| F3 | Find next instance |
| SHIFT+Enter | Insert carriage return |

# Preparing a Document

This section discusses the PDF-eXPLODE Tag rules with a practical review
of how this tag can hange from Text Documents to various Report Writers

# PDF-eXPLODE Tag

## What is a "Tag"?

A Tag is a text string, embedded invisibly in your document and formatted to business rules that you configure within PDF-eXPLODE so you can achieve your document delivery objectives.

PDF-eXPLODE uses the tag to "explode" your master document into multiple pages and based on your configured tag rules, it knows where to send the document, how to name the file and where to save it on your hard drive.

The tag consists of 3 parts, each optional but at least one part must exist on a page between a pair of front and back nodes (**<pdfexplode></pdfexplode>**)
You insert PDF-eXPLODE tags in your documents to indicate which settings to use when exploding and e-mailing documents. The general format is:  **<pdfexplode>variables%messageID# e-mails</pdfexplode>**
The '%' indicates the end of Variables, whereas as '#' confirms that the word in front of it is a Message ID. **The email address must always be at the end of the tag.**

## Tag Format Rules

A PDF-eXPLODE tag must be formatted according to specific rules.

- A PDF-eXPLODE tag must begin with a <pdfexplode> open tag and end with a </pdfexplode> close tag. Optionally, curly braces ({})or square brackets ([]) may be used instead of angle brackets (<>), for example, {pdfexplode}...{/pdfexplode} or [pdfexplode...[/pdfexplode] are valid, but you cannot mix angle brackets, curly braces and square brackets within a tag.
- Within the open <pdfexplode> tag and the close </pdfexplode> tag you must specify at least one of three optional sections: variables, a message ID and/or e-mail address(es) or Client Id. The general format is: <pdfexplode>variables%messageID#e-mails</pdfexplode> - see examples below.
- You may optionally specify multiple e-mail addresses separated with a comma (,) or semicolon (;).   Only the first Client ID e-mail address will be used to search for a Client Details screen or on a Client-specific Message ID Tags screen.  Also, only the first Client ID e-mail address will be used in naming the attachment PDF file.
- You may optionally precede the first Client ID or e-mail address with a Message ID tag followed by a pound sign (#).
- You may optionally precede the first Client ID or e-mail address, or an optional Message ID, with up to nine variables followed by a percent sign (%).  Variables must be separated with a comma (,).
- The case of the open <pdfexplode> tag and the close </pdfexplode> tag must match.
- The case of the text between the open <pdfexplode> tag and the close </pdfexplode> tag can be upper or lower.
- The entire tag must have a standard Windows font applied to it, such as **Arial** or **Times New Roman**, and must be a minimum size of 7 points.
- A tag must fit entirely on a single line.  Apply a small font size to minimize the risk of a tag not fitting entirely on a single line.
- A tag must not be overshadowed by an image in close proximity to it, as this can mask the text thereby making it difficult to "read" the tag when exploding.
- A tag may not contain more than 240 characters, for example, the tag <pdfexplode>MyDocument</pdfexplode> contains 10 characters.

## Document Tagging Rules

A PDF-eXPLODE tag must be inserted within a document according to specific rules.

- If you are operating with the default exploding rule, then only pages that begin with a PDF-eXPLODE tag will be included in exploded PDF files, so the page header in your document template,  is the ideal location of the tag, to ensure each page is included.
- (From V4.0.9.97 Feb 2014) If you have selected the rule (under Mail Setting/Exploding Rules) *'Blank TAG pages are exploded using the previous Tag page'* , then blank-tag pages are permitted in the document. The first blank page prior to any tag in the document will be ignored.  To see how exploding will occur in this exploding method, click here
- You may include multiple PDF-eXPLODE tags per page if you want to send a page to multiple recipients.
- All of the pages associated with the same tag content will be combined into a single PDF file.
- You may change the color of the tag to white to make it invisible in the resulting document.

Note: An empty tag, for example <pdfexplode></pdfexplode>, will create an exploded PDF file with a name determined as follows:

1. If **Suppress DATE_TIME on exploded filename** *is not* selected in **General Settings** and **Exploded File Name** *is* blank in **Mail Settings**, then the file name will be **yyyymmdd_hhmmss.pdf**, where the name represents the system date and time when the file was created.
2. If **Suppress DATE_TIME on exploded filename** *is* selected in **General Settings** and **Exploded File Name** *is* blank in **Mail Settings**, then the file name will be **.pdf**.
3. 

PDF-eXPLODE

If **Suppress DATE_TIME on exploded filename** *is* selected in **General Settings** and **Exploded File Name** *is not* blank in **Mail Settings**, then the file name will be the name specified in **Mail Settings** followed by **.pdf**.

4. If **Suppress DATE_TIME on exploded filename** *is not* selected in **General Settings** and **Exploded File Name** *is not* blank in **Mail Settings**, then the file name will be the name specified in **Mail Settings** with **yyyymmdd_hhmmss.pdf** appended.

5. The location of the exploded PDF file will be the path specified in **Mail Settings**, or if blank then the **Default Document Path** specified in **General Settings**.

**PDF File Name Rules**

- PDF-eXPLODE creates each exploded file with a temporary file name using the full tag (excluding the open /close < pdfexplode > nodes). This filename can be recognized from the **_expl.pdf** end.
- Windows does not permit the following characters to be used in file names, and therefore they cannot be used in a tag: < > : " / \ | ? *
- Period (.) may not be used as the first character in a file name.
- PDF-eXPLODE does not permit the following characters to be used in file names, message IDs or in variables unless the variable is surrounded within the backwards single quote character (`) or ASCII character 96, which is usually located on the same key as the tilde (~) to the left of the numeral one (1) key on the keyboard: # % ~ ^ `

**Example Tag to Specify a PDF File Name**

&lt;pdfexplode&gt;MyDocument&lt;/pdfexplode&gt;
&lt;pdfexplode&gt;MyDocument, mail@3000ad.com.au&lt;/pdfexplode&gt;

1. In the first example above, the standard tag has no email address, a file name MyDocument.pdf is created and the process ends. No e-mail address exists in the tag.
2. In the second example, the filename is followed by a comma (,) and an e-mail address; hence a file (MyDocument.pdf) will be created and delivered to mail@3000ad.com.au subject to the General Settings option' Explode and e-mail to all Tag e-mail addresses'.

**Example Tag to Specify an E-mail Address**

&lt;pdfexplode&gt;JohnSmith@SmithCompany.com&lt;/pdfexplode&gt;

In addition to the **Standard** e-mail format shown above, you may optionally specify in General Settings that e-mail addresses in tags are in **Full Name** format.

- Example Tag to Specify an E-mail Address in Full Name Format, will be sent to **JohnSmith&lt;Sales@SmithCompany.com&gt;**:&lt;pdfexplode&gt;John Smith!Sales@SmithCompany.com&lt;/pdfexplode&gt;

**Example Tag to Specify an E-mailable Fax Number**

Many fax servers allow you to send a PDF e-mail attachment by forming an e-mail address with the fax number followed by the fax server domain name, for example:

&lt;pdfexplode&gt;9780001234@MyFaxServer.net&lt;/pdfexplode&gt;

In addition to the **Standard** e-mail format shown above, you may optionally specify in General Settings that e-mail addresses in tags are in **Fax Sending** format.

- Example Tag to Specify an E-mail Address in Fax Sending Format, will be sent to
- **9780001234&lt;JohnSmith@MyFaxServer.net&gt;:&lt;pdfexplode&gt;9780001234!JohnSmith@MyFaxServer.net&lt;/pdfexplode&gt;**

**Example Tag to Specify an E-mail Message**

&lt;pdfexplode&gt;Invoice#JohnSmith@SmithCompany.com&lt;/pdfexplode&gt;

- The above example assumes you have created a Default Message ID Tag named **Invoice**. In addition to defining a default e-mail message for invoices, you may also have created a Client-specific Message for invoices under the Client Details for JohnSmith@SmithCompany.com.

**Example Tag to Specify Multiple E-mail Addresses**

&lt;pdfexplode&gt;JohnSmith@SmithCompany.com,AccountsReceivable@SmithCompany.com&lt;/pdfexplode&gt;

- Remember that the tag must fit entirely on a single line in the document. You may reduce the font size to fit, if necessary.
- Separate e-mail addresses with a comma (,) or semicolon (;).
  - Files are named based on the first tag unless you specify a variable as the filename (see example below). Therefore, do not use multiple different tags that begin with the same e-mail address or else PDF-eXPLODE may mix up the documents. For example, if you have the following tags:<pdfexplode>John@SmithCompany.com,Mary@SmithCompany.com,Susan@SmithCompany.com</pdfexplode>
    <pdfexplode>John@SmithCompany.com,David@SmithCompany.com,Andrew@SmithCompany.com</pdfexplode>
    change the order of one of the tags so that John is not first in both tags, for example:
    <pdfexplode>John@SmithCompany.com,Mary@SmithCompany.com,Susan@SmithCompany.com</pdfexplode>
    <pdfexplode>David@SmithCompany.com,John@SmithCompany.com,Andrew@SmithCompany.com</pdfexplode>

## Example Tag to Specify a CC or a BCC e-mail address

You can include CC and BCC e-mail addresses in a tag *in addition to* the TO address(es).

- To include one or more CC e-mail addresses, precede the CC addresses with a tilde (~), for example:

<pdfexplode>JohnSmith@SmithCompany.com,~BobJones@SmithCompany.com,MaryBrown@SmithCompany.com</pdfexplode>

- To include one or more BCC e-mail addresses, precede the BCC addresses with BC-, for example:

<pdfexplode>JohnSmith@SmithCompany.com,BC-BobJones@SmithCompany.com,MaryBrown@SmithCompany.com</pdfexplode>

- If you use both CC and BCC, the CC addresses must come before the BCC addresses:

<pdfexplode>JohnSmith@SmithCompany.com,~BobJones@SmithCompany.com,BC-MaryBrown@SmithCompany.com</pdfexplode>

- You cannot include CC or BCC address *without* a TO address.

## Example of Multiple Tags per Page

<pdfexplode>President@SmithCompany.com</pdfexplode>
<pdfexplode>Vice-President@SmithCompany.com</pdfexplode>
<pdfexplode>Director@SmithCompany.com</pdfexplode>

- This is an alternative if a tag with multiple e-mail addresses does not fit on a single line.

## Example Tag to Specify a Folder and File Name Using Variables

<pdfexplode>November,Invoice_12345%JohnSmith@SmithCompany.com</pdfexplode>

- In the above example, an invoice will be e-mailed to John Smith and the PDF will be archived in \November\Invoice_12345.pdf, where the PDF file folder name is in variable 1 and the PDF file name in variable 2.
- You can specify the pathname to \November\Invoice_12345.pdf, for example, G:\Invoices, using the File Path on a Default Message ID Tag, Client Details or a Client-specific Message ID Tag screen. If you are not using either Message IDs or Client IDs or these have been left blank, you will need to specify an exploded file path under Mail Settings for use. If those File Path settings are blank, the most recently used folder will be used, which may or may not be the Default Document Path on the General Settings screen.
- Remember that the tag must fit entirely on a single line in the document. You may reduce the font size to fit, if necessary.

# Text-based Documents

Text based documents like MS Word and how the PDF-eXPLODE tag rules apply

# Tagging a Microsoft Word Document

Microsoft Word® documents are text-based documents.  A text-based document is a document in which you type literal tags to indicate which pages go in which PDF files.  For example, you might send different sections of a document to different people.  All of the pages associated with the same e-mail address will be combined into a single PDF file.  The best way to insert a [PDF-eXPLODE tag](#) into a Word document is to type it directly into the page header.  Only pages that begin with a PDF-eXPLODE tag will be included in a PDF file.

▶ **Insert a PDF-eXPLODE Tag**

- To type text in the page header of a Microsoft Word document, on the **View** menu click **Header and Footer**.  After typing the text, click anywhere outside the header.
- Type a PDF-eXPLODE tag with the name of the desired PDF file, which may be an e-mail address if you want PDF-eXPLODE to send the PDF file as an e-mail attachment.  The following example PDF-eXPLODE tag will not be sent by e-mail:

     <pdfexplode>mydocument_</pdfexplode>The following example PDF-eXPLODE tag contains an e-mail address:
     <pdfexplode>JohnSmith@SmithCompany.com</pdfexplode>
- The case of the open <pdfexplode> tag and the close </pdfexplode> tag must match, so always use lowercase to be safe.
- A tag must fit entirely on a single line.  Apply a small font size to minimize the risk of a tag not fitting entirely on a single line.
- The entire tag must have a standard Windows font applied to it, such as **Arial** or **Times New Roman**.
- You may change the color of the tag to white to make it invisible in the resulting document.
- You may include multiple PDF-eXPLODE tags per page if you want to include a page in multiple exploded documents.
- All of the pages associated with the same filename will be combined into a single PDF file.

# Data-driven Documents

Data driven documents produced by Report Writers like Crystal Reports and MS Access and the tag rules that apply.

# Tagging a Crystal Report

Crystal Reports® stores documents in .rpt files, which are data-driven documents.  A data-driven document is one in which you insert placeholders where you want information from the fields in your database to appear within the report.  If your database has a field containing e-mail addresses, you can send different sections of a report to selected e-mail addresses.  For example, if you are sending invoices, you might insert the e-mail address of your clients' account payable contact into the invoice page header so that each invoice is sent to the correct client contact person.  All of the pages associated with the same e-mail address will be combined into a single PDF file.

Instead of using a database field to supply the e-mail address, you may optionally use a text object for the e-mail address if you always send a report to the same e-mail address, for example you may have a report you always send to JohnSmith@SmithCompany.com.  Another alternative is to use a formula field to supply the e-mail address if you have special requirements for computing an e-mail address, for example if-then logic to select from among several e-mail addresses for each client. In any case, you insert a PDF-eXPLODE tag into a Crystal report using a text object.

▶ **Insert a PDF-eXPLODE Tag**

- On the Insert menu Click Text Object.
- Place the text object in a Page Header section beginning at the left margin. Make sure the selected section is not suppressed.
- Within the text object, type the following:

    <pdfexplode></pdfexplode>
    If you are using a Message ID Tag, for example invoice, then your tag would look as follows:
    <pdfexplode>invoice#</pdfexplode>

- In the Field Explorer, click on the desired e-mail field.  You may use a database field, formula field or even a running total field.
- Drag the selected field and drop it immediately before the close </pdfexplode> tag.
- Make the text object as wide as necessary for the entire PDF-eXPLODE tag to appear in its entirety for the longest e-mail address. Click and drag the right handle of the text object all the way to the right margin.
- A tag must fit entirely on a single line.  Apply a small font size to minimize the risk of a tag not fitting entirely on a single line.  Select the text object and click Format Text on the Format menu.  Click the Font tab, enter 6 for the Size and click OK.
- The entire tag must have a standard Windows font applied to it, such as Arial or Times New Roman.  Select the text object and click Format Text on the Format menu.  Click the Font tab, set Font to Arial and click OK.
- You may change the color of the tag to white to make it invisible in the resulting document.  Select the text object and click Format Text on the Format menu.  Click the Font tab, set Color to White and click OK.

# Tagging a Microsoft Access Report

Microsoft Access® reports are data-driven documents.  A data-driven document is one in which you insert placeholders where you want information from the fields in your database to appear within the report.  If your database has a field containing e-mail addresses, you can send different sections of a report to selected e-mail addresses.  For example, if you are sending invoices, you might insert the e-mail address of your clients' account payable contact into the invoice page header so that each invoice is sent to the correct client contact person.   All of the pages associated with the same e-mail address will be combined into a single PDF file.  The easiest way to insert a PDF-eXPLODE tag into an Access report is using a text box.

▶ **Insert a PDF-eXPLODE Tag**

- 
  Click the Text Box tool ab| in the toolbox.
- Click the upper left corner of the page header section to indicate where you want to place the text box.
- Place the insertion point in the text box and type an expression that includes the e-mail address or the name of the field containing the e-mail address, and an optional Message ID Tag.  For example, if your database has a field named Email, you would enter the following expression

      ="<pdfexplode>" + [Email] + "</pdfexplode>"
      If you are using a Message ID Tag, for example invoice, then your tag would look as follows:
      ="<pdfexplode>invoice#" + [Email] + "</pdfexplode>"

- Make the text field as wide as necessary for the entire PDF-eXPLODE tag to appear in its entirety for the longest e-mail address. Click and drag the right handle of the text field all the way to the right margin.
- A tag must fit entirely on a single line.  Apply a small font size to minimize the risk of a tag not fitting entirely on a single line.  Right-click the text box, click Properties and click the Format tab.  Enter 6 for the Font Size.
- The entire tag must have a standard Windows font applied to it, such as Arial or Times New Roman.  Right-click the text box, click Properties and click the Format tab.  Set Font Name to Arial.
- You may change the color of the tag to white to make it invisible in the resulting document.  Right-click the text box, click Properties and click the Format tab.  Set Fore Color to White.

# Tagging a Microsoft Word Mail Merge Document

Microsoft Word® provides a Mail merge Wizard that enables the creation of data-driven documents. A data-driven document is one in which you insert placeholders where you want information from the fields in your database to appear within the report. If your database has a field containing e-mail addresses, you can send different sections of a report to selected e-mail addresses. For example, if you are sending invoices, you might insert the e-mail address of your clients' account payable contact into the invoice page header so that each invoice is sent to the correct client contact person. All of the pages associated with the same e-mail address will be combined into a single PDF file. The best way to insert a PDF-eXPLODE tag into a Word document is to type it directly into the page header. Only pages that begin with a PDF-eXPLODE tag will be included in a PDF file.

## ▶ Insert a PDF-eXPLODE Tag

- On the Tools menu, point to Letters and Mailings and click Mail Merge Wizard.
- Follow Steps 1-3 of the wizard.
- When you reach Step 4 of the wizard, click Header and Footer on the View menu.
- Type the PDF-eXPLODE open tag as follows:

    <pdfexplode>
- In the wizard window, click More items... to display the Insert Merge Field dialog.
- Click the e-mail address field and then click Insert and Close.
- Type the PDF-eXPLODE close tag so that the completed tag looks as follows, where Email_Address would be the actual field name in your database:

    <pdfexplode>«Email_Address»</pdfexplode>
- Within the text object, type the following:

    <pdfexplode></pdfexplode>
    If you are using a Message ID Tag, for example invoice, then your tag would look as follows:
    <pdfexplode>invoice#</pdfexplode>

- A tag must fit entirely on a single line. Apply a small font size to minimize the risk of a tag not fitting entirely on a single line. Select the tag and click Font on the Format menu. Click the Font tab, enter 6 for the Size and click OK.
- The entire tag must have a standard Windows font applied to it, such as Arial or Times New Roman. Select the tag and click Font on the Format menu. Click the Font tab, set Font to Arial and click OK.
- You may change the color of the tag to white to make it invisible in the resulting document. Select the tag and click Font on the Format menu. Click the Font tab, set Font color to White and click **OK**.

# Tagging an R&R Report

R&R Report Writer® stores documents in .rrw or .rsw files, which are data-driven documents.  A data-driven document is one in which you insert placeholders where you want information from the fields in your database to appear within the report.  If your database has a field containing e-mail addresses, you can send different sections of a report to selected e-mail addresses.  For example, if you are sending invoices, you might insert the e-mail address of your clients' account payable contact into the invoice page header so that each invoice is sent to the correct client contact person.  All of the pages associated with the same e-mail address will be combined into a single PDF file.  Instead of using a database field to supply the e-mail address, you may optionally use a text field for the e-mail address if you always send a report to the same e-mail address, for example you may have a report you always send to JohnSmith@SmithCompany.com.  Another alternative is to use a calculated field to supply the e-mail address if you have special requirements for computing an e-mail address, for example if-then logic to select from among several e-mail addresses for each client. In any case, the easiest way to insert a PDF-eXPLODE tag into an R&R report is using a calculated field.

▶ **Insert a PDF-eXPLODE Tag**

- If your report does not already have a Page Header band, insert one.  On the Insert menu Click Create Band Line.  Click Select Band, leave the default band as Page Header and click OK.
- Create a calculated field that includes the field with the e-mail address.  On the Calculations menu click Calculated Fields and then click New.  Enter a field name such as PDFeXPLODE and then enter an expression such as the following example, where you will replace e_mailAddr with the actual name of the field in your report that contains the e-mail address.  When you are finished, click OK and Close.

    "<pdfexplode>" + e_mailAddr + "</pdfexplode>"
    If you are using a Message ID Tag, for example invoice, then your tag would look as follows:
    "<pdfexplode>invoice#" + e_mailAddr + "</pdfexplode>"

- Place the cursor in the upper left corner of the report at the beginning of the first Page Header line and insert the field you just created.  On the Insert menu click Field.  In the Insert Field dialog box, click Insert and Close.
- Make the text field as wide as necessary for the entire PDF-eXPLODE tag to appear in its entirety for the longest e-mail address. Click and drag the right handle of the text field all the way to the right margin.
- A tag must fit entirely on a single line.  Apply a small font size to minimize the risk of a tag not fitting entirely on a single line.  Select the text field and click Font on the Format menu.  Enter 6 for the Size and click OK.
- The entire tag must have a standard Windows font applied to it, such as Arial or Times New Roman.  Select the text field and click Font on the Format menu.  Set Font to Arial and click OK.
- You may change the color of the tag to white to make it invisible in the resulting document.  Select the text field and click **Font** on the **Format** menu.  Set **Color** to **White** and click **OK**.

# Printing to PDF-eXPLODE

This section discusses the Printing and Logging options available

# Print Options

When you click **Print** on the **File** menu in most Windows Applications, you may select PDF-eXPLODE as your "printer."  Doing so instructs PDF-eXPLODE to intercept the output rather than sending it to a printer.  After capturing your printer output, PDF-eXPLODE displays the **Print Options** dialog.

Using the print Options dialog, you can save the document to a "master" PDF file instead of printing it.  In addition to creating the master PDF file, you can explode the master PDF file into separate "exploded" PDF files each of which may contain all or just selected pages from the master PDF file according to the PDF-eXPLODE Tags you inserted.  Finally, you may optionally e-mail the exploded PDF files.

All of the steps in the process described above (create, explode, e-mail) can be initiated by the user manually or can be set to run unattended in an automated fashion, called "Silent Mode".  You select whether PDF-eXPLODE operates in silent mode on the General Settings screen.

In silent mode, the Print Options dialog is not displayed. If you print a document containing no PDF-eXPLODE tags, the Print Options dialog will display regardless of the Silent Mode setting (except on PDF-eXPLODE Printer Server and PDF-eXPLODE Report Server, since dialogs cannot be displayed on the workstation.)  When silent mode is not selected, you may interact with the Print Options dialog to control the process of document creation, exploding and e-mailing.  The remainder of this help topic describes the options on the Print Options dialog when silent mode is not selected and you are operating PDF-eXPLODE manually.

▶ **Summary**
You may optionally specify the following PDF document properties.

- **File Name** is both the Windows filename and the PDF file title given to the master PDF file.
- **Author** might be useful for identifying your name or your company's name.
- **Subject** might be useful for identifying the type of document, such as "Invoice" or "Monthly Statement".
- **Keywords** might be useful for searching documents.

Not to be confused with Windows file properties, PDF file properties may be viewed using either of the following methods:

- Click **Start**, point to **Programs**, point to **Accessories**, and then click **Windows Explorer**.
- Select the folder in which you saved your PDF file.
- Double-click the PDF file you created to open it in your PDF viewer
- Click **Document Properties** on the **File** menu.
- When you are finished viewing the properties, click **OK** and then click **Exit** on the **File** menu.

-or-

- Right-click **Start** and click **Explore**.
- Select the folder in which you saved your PDF file.
- Right-click the PDF file you created and click **Properties**.
- Click the **PDF** tab.
- When you are finished viewing the properties, click **OK**.

▶ **Quick Mail**
Quick Mail enables you to convert a document into a PDF file and send it as an e-mail attachment *without* placing a PDF-eXPLODE tag in the document.  This is handy for ad-hoc and one-off documents.  Any PDF-eXPLODE tags embedded in the document will be ignored and PDF Security Settings will be ignored, i.e. the behavior will be the same as when Security Mode is set to **Do Not Secure any PDF document after**
**exploding**.

The Print Options dialog will display if you print a document that contains no <pdfexplode> tags. To disable this feature, select **Suppress Quick Mail when the document has no <pdfexplode> Tags** in General Settings.

- Select **Send PDF created as attachment to Quick Mail** to enable Quick Mail options.
- **To:** is the e-mail address to which the e-mail will be sent.  Multiple e-mail addresses must be separated with a comma (,) or semicolon (;). Click **To:** to display a list of e-mail addresses from your Microsoft Outlook address book. Select one or more addresses and click **Continue** to enter the addresses or click **Close** to cancel.
- **Cc:** works like **To:**, enabling you to send a copy of the e-mail to one or more e-mail recipients.  Multiple CC e-mail addresses must be separated with a comma (,) or semicolon (;). Unlike BCC, recipients will see each other's e-mail addresses.
- **Bcc:** works like **To:**, enabling you to send a blind copy of the e-mail to one or more e-mail recipients.  Multiple BCC e-mail addresses must be separated with a comma (,) or semicolon (;). Unlike CC, BCC recipients will not see each other's e-mail address.
- Select **Send e-mails as HTML** to format e-mail messages using HTML. Using HTML enables you to format e-mail messages using fonts and images, etc. If you do not select this option, e-mails will be sent as text (i.e. without formatting such as fonts, etc.)

- **Subject** is the subject that appears on the e-mail when received by your clients.
- **Attachment** is the pathname of an optional PDF file to attach (in addition to the PDF file created by PDF-eXPLODE). You may enter the pathname or click **Browse** to select a file.
- **Message** is the message that will appear in the body of the e-mail received by your clients. If you selected **Send e-mails as HTML**, click **Create HTML Message** to write a message using the HTML Editor, and when you are finished save your changes and close the HTML Editor to return to this dialog. If you did not select **Send e-mails as HTML**, type your message in the area provided.
- Select e-mail flags for Importance and Sensitivity, if desired. Note that some e-mail clients, such as Outlook Express, do not display all of the e-mail flags.
  - Set **Importance** to **Normal**, **Low** or **High**. Press the Delete key to clear the selection.
  - Set **Sensitivity** to **Normal**, **Personal** , **Private** or **Confidential**. Press the Delete key to clear the selection.
- Select **Read Receipt** to receive an e-mail notification when a recipient reads the e-mail sent by PDF-eXPLODE. Note that not all e-mail servers support this option and also a recipient may optionally deny sending a read receipt.

▶ **Options Button**

Click **Options** to to display and/or modify options including General Settings, Security Settings and Mail Settings, as well as Default Messages, Client Details and Client-specific Messages.

▶ **Explode Later Button**

Click **Explode Later** to save the master PDF file in the PDF-eXPLODE queue if you want to explode and e-mail it later.  PDF-eXPLODE will automatically select **Suspend Printer** on the Main Menu, placing a check mark next to the menu item.  When you de-select **Suspend Printer**, processing continues.  If silent mode is selected on General Settings, the pending documents are exploded and e-mailed immediately.  If silent mode is not selected then the **Print Options** dialog is displayed to allow the user to control processing.

▶ **Explode Now Button**

Click **Explode Now** to explode the master PDF file into separate PDF files according to the embedded PDF-eXPLODE tags.  If the Quick Mail options are specified, the exploded PDF files will be e-mailed.  If Quick mail is not selected, the exploded PDF files will be e-mailed according to the Mail option on General Settings. The the current mail option is displayed for easy reference and may be changed by clicking the Options button.

▶ **Create PDF Button**

Click **Create PDF** to save the master PDF file without exploding it or e-mailing the exploded PDF files. This button does not appear when you have selected **Send PDF created as attachment to Quick Mail**.

▶ **Create & E-Mail PDF Button**

Click **Create & E-Mail PDF** to save the master PDF file and explode and e-mail the exploded PDF files.  This button only appears when you have selected **Send PDF created as attachment to Quick Mail**.

▶ **Cancel Button**

Click **Cancel** to remove the document from the PDF-eXPLODE queue without saving, exploding or e-mailing.

# Logging Operations

When you use PDF-eXPLODE to explode and send PDF attachments by e-mail, you may want to check the status of the PDF files and the e-mails that were sent.  Below are some suggested ways to monitor the status.

▶ **View the Exploded PDF Files**
You may view the PDF file you just created if you have a PDF viewer installed such as the free Adobe Reader, available at www.adobe.com. If you do not have a PDF viewer installed, PDF-eXPLODE includes one named PeXPDFViewer, which can be accessed from the Logging and Utilities screen.

1. Click Start, point to Programs, point to Accessories, and then click Windows Explorer.

   -or-

   Right-click Start and click Explore.
2. Select the folder in which you save your exploded PDF files.▶ Tips

   - The Default Document Path is displayed on the General Settings screen.
   - If the Default Document Path is blank, the location will be in the folder named PDFs located in the directory where the PDF-eXPLODE program is installed (refer to What's Installed Where for the location.)
3. Double-click the PDF file you want to view to open it.  (The filenames will be your clients' e-mail address followed by the date and time.)  Close your PDF viewer when done.

▶ **View the PDF-eXPLODE Log Files**
It is a good idea to check the PDF-eXPLODE Log Files to be sure no errors occurred sending the e-mails.  Log files are accessible from the Logging and Utilities screen. If you are sending e-mail via SMTP, this is the best way to check on the success or failure of each e-mail. Use the option labeled Log details of SMTP e-Mails to get details if e-mails are failing and you are sending via SMTP (not available for MAPI, or Outlook).

▶ **View Sent E-mails**
If you are sending e-mail via Microsoft Outlook (MAPI), you can look for e-mails in your Sent folder. Make sure they are not stuck in the Drafts folder. If so, you must open and send them.

▶ **Monitor the Return Address Inbox**
It is a good idea to specify an e-mail account in the Sender Name field of Mail Settings where you can easily check for return e-mails when delivery problems occur.  Delivery errors may result if someone typed an e-mail address incorrectly, or an employee is no longer be with a company.  Undeliverable e-mails may also return error notification e-mails to this address.
For example, you might create an e-mail account named "CustomerService@YourCompany.com".  Then, in the Sender Name field you would enter the following (be sure to leave a space before the left angle bracket (<):
        Customer Service <CustomerService@yourcompany.com>
For e-mails that are delivered successfully, the recipient will see the sender name in their "From" field.  However, if the receiving e-mail server encounters an error, it may send a reply e-mail back to this e-mail account to help you resolve the error.  You may need to work with your intended recipient to resolve the error if their e-mail server has blocked your e-mail for some reason.

▶ **Advanced Diagnostics**
If documents accumulate in the queue with the status "Waiting", make sure you have not suspended PDF-eXPLODE by opening PDF-eXPLODE and checking the Printer menu. To diagnose other processing issues, use the PDF-eXPLODE. log and PDF-eXPLODESPL.log (refer to What's Installed Where for the location.)  Information that can be found in these files includes:
PDF-eXPLODE.log - Logs operations of the main program.
If no log entries are created in the PDF-eXPLODE.log then check the PDF-eXPLODESPL.log as PDF-eXPLODE executable may have failed to launch.

- Creation of the Master PDFIf no master PDF is created, then no exploding, e-mailing or archiving will occur.
- Exploding the master PDF
- Sending exploded PDF files via e-mail or FTPIf no e-mails are sent, make sure the E-mail option on General Settings is not set to "Do not send by e-mail to Clients after exploding".
    If e-mails fail to send, check the log for the phrase "Unable to relay" and if present, you must configure your outgoing e-mail server (SMTP server) to allow relays from the computer on which PDF-eXPLODE is installed.
    If e-mails do not include attachments, make sure you have not selected the option "Do NOT attach exploded PDFs to ANY e-mails" on General Settings.
- 

*PDF-eXPLODE*

Archiving exploded PDF filesIf no archive files are not created, make sure your Windows user account has Full control permissions for the destination folder.

**PDF-eXPLODESPL.log** - Logs the process that moves files from the Windows printer spooler to the PDF-eXPLODE program.

- Communication/handover of the Windows document file output (in postscript format) to PDF-eXPLODE's print spooler
- Launching of the PDF-eXPLODE executableIf launching PDF-eXPLODE fails, make sure your Windows user account has the permissions described in the [Installation](#) instructions.

# Command Line Usage

This describes the command line processes available to Users.
This command line is useful when scheduling the processing; or
where the PDF-eXPLODE which is your connection (from PDF-eXPLODE).

# Run PDF-eXPLODE from a Command Line

If you need to explode and e-mail an existing PDF file, besides the conventional end-to-end method of clicking PRINT from within your Report Writer or document application, you can :

- drag-and-drop the PDF file onto the PDF-eXPLODE program window,
- use the PDF-eXPLODE Utilities, or
- use a command line, or
- send the PDF with an embedded tag to a folder monitored every 10 minutes by PDFeMONITOR.

PDFeMONITOR is our auto monitoring tool (further information from info@pdf-explode.com). This software will automatically launch PDF-eXPLODE and explode , email and archive any 3rd party PDF with tags.

**All of the four methods assumes you have separately created a PDF with embedded tag using PDF-eXPLODE or a third party software.** This 'master' PDF containing all pages to be distributed can be created by PDF-eXPLODE PDF engine or by some third party PDF creation software. The PDF file format in all above cases, must be version 1.7 or earlier - check PDF file properties if unsure, by opening it in Adobe Reader, select File/Properties menu. PDF Version shows under 'Advanced' on the Description tab.

Each method has its own advantages: drag-and-drop is fast and convenient, PDF-eXPLODE Utilities provides a user-friendly interface, using the PDFeMONITOR tool allows you to automate the explode and emailing process from a third party PDF source,  and running PDF-eXPLODE from a command line can be used to accomplish such applications as:

- Using Window Task Scheduler to automate the execution of PDF-eXPLODE
- Exploding an existing PDF created by another application.

### For example:

- Some applications (e.g. SQL Server Reporting Services) print an image rather than text which makes the PDF-eXPLODE tags unreadable. So, instead of printing to PDF-eXPLODE you need to export to PDF and then explode the PDF.
- Some applications produce smaller PDF files so it may be advantageous to create the PDF using software other than PDF-eXPLODE.

## ▶ Drag-and-drop

- Open PDF-eXPLODE.
- Using Windows Explorer, navigate to the desired PDF file.
- Using the mouse, drag the PDF file to the PDF-eXPLODE window and when the cursor changes to plus sign release the mouse. If the mouse cursor fails to turn to a plus from a circle, then you may like to read this article

## ▶ PDF-eXPLODE Utilities

- Open PDF-eXPLODE.
- Click the Printer menu and select PDF-eXPLODE Options.
- Select Logging and Utilities.
- Click Explode & E-mail PDFs.
- Click Browse and select the file.
- Click Explode & E-mail.

## ▶ Command Line Format
"Program Path" -PRINTFILE"master PDF path/file name"

For example:

"C:\Program Files\PDF-eXPLODE\PDF-eXPLODE.exe" -PRINTFILE"C:\Program Files\PDF-eXPLODE\PDFS\PDF-eXPLODE.pdf"

Note that there is no space between -PRINTFILE and the name of the PDF.

### ▶ Detailed Instructions

-

First, you must verify the location of the PDF-eXPLODE.exe file on your computer. If you accepted the default folder location when you installed PDF-eXPLODE, the PDF-eXPLODE.exe file is probably located at: C:\Program Files\PDF-eXPLODE\PDF-eXPLODE.exe

- If you do not find the PDF-eXPLODE.exe file at that location, search for the file and make a note of the full path.
-

  Do one of the following Windows Vista:  Click the Start button [image], point to All Programs, click Accessories, and then click Run.
- Windows XP, 2000,2003:  Click the Start button, and then click Run.

1. In the **Run** dialog box, type a double quote (") followed by the full pathname for the PDF-eXPLODE.exe file (including the file name) and another double quote, or click **Browse** to locate it.
2. At the end of the path, type a space, and then type the switch -PRINTFILE, a double quote, the full path of the master PDF file to be exploded and another double quote.  Note that there is no space between -PRINTFILE and the name of the PDF. For example, you can type (or copy, paste and edit the following example):

   > 32-bit systems:
   > "C:\Program Files\PDF-eXPLODE\PDF-eXPLODE.exe" -PRINTFILE"C:\Program Files\PDF-eXPLODE\PDFS\PDF-eXPLODE.pdf"
   >
   > 64-bit systems:
   >
   > "C:\Program Files (x86)\PDF-eXPLODE\PDF-eXPLODE.exe" -PRINTFILE"C:\Program Files\PDF-eXPLODE\PDFS\PDF-eXPLODE.pdf"

   > ▶ **Tips**
- Switches and parameters are not case sensitive. For example, -PRINTFILE is the same as -printfile
- Remember to include one blank space before the -PRINTFILE switch and NO SPACE after it.
- If the PDF pathname has spaces in it, enclose the complete name in quotation marks; for example, "C:\Program Files\PDF-eXPLODE\PDFS\PDF-eXPLODE.pdf".

1. Click **OK**.
2. The exploded files are created in the same folder as the master PDF, unless there is an **Exploded File Path** specified in Mail Settings.

## ▶ **Using PDFeMONITOR**

PDFeMONITOR is an auto monitoring tool that is capable of launching PDF-eXPLODE and passing to it any PDF containing tags, for exploding and delivery. It is especially useful    where you the Client, are using a third party PDF engine to create tagged PDFs directly from your accounting or reporting software.  PDFeMONITOR's process is  automatic with no human intervention required. Just save your PDFs to a pre-configured (in PDFeMONITOR) folder and set the time intervals (from 10 minutes to 2 hours) for PDFeMONITOR to scan the folder path. PDFeMONITOR is not a scheduler but it certainly will benefit you in a similar way. Once PDFeMONITOR is started, it sits silently in the Windows system tray (where the clock resides in the lower right corner of your screen) all the time monitoring your nominated folder.

PDFeMONITOR installs into a subfolder of PDF-eXPLODE. It create 3 subfolders relative to its location - INBOX, OUTBOX, PROCESSED at installation time. By default all polling (aka 'monitoring') of the INBOX for any incoming PDFs, will be set to every 10 minutes.

Once a PDF is found in the INBOX, PDFeMONITOR first moves the PDF to OUTBOX and will then start PDF-eXPLODE, passing the PDF to it to explode, deliver and archive according to the Tag found. PDFeMONITOR will then move the processed PDF to the PROCESSED folder and write a log line in the PDFeMONITOR log. If no tag exists in the PDF, then the PDF will be closed and moved to the PROCESSED folder. You will need to directly save all PDF created by your business software into the PDFeMONITOR INBOX subfolder.

In the Windows system tray, PDFeMONITOR is accessible with a right mouse click. The monitoring process can be paused, reconfigured  or shut down. It is ideal for automating the exploding process from your business system which creates the PDFs.

**If you need a free copy of PDFeMONITOR to automate your process, please request it here**

## ▶ **Restarting an Incomplete Job**
If the PDF-eXPLODE process is interrupted after creating the temporary exploded PDF files (named *_expl.pdf), you can manually restart the process and complete the naming, e-mailing and archiving steps using the command:
"Program Path"  -CONTINUE"FolderPath of the_expl.pdf"
Note there is no space after the word CONTINUE. For example:

**PDF-eXPLODE**

"C:\Program Files\PDF-eXPLODE\PDF-eXPLODE.exe" -CONTINUE"C:\PROGRAM FILES\EXPLODED PDFS"

If you are unsure of where the _expl.pdf temporary files are located, you can use an alternate form of the command that will use the last saved folder name (in pdfexplode.ini, the settings file):

"Program Path" -CONTINUETRUE

Note that CONTINUETRUE is one word. For example:

"C:\Program Files\PDF-eXPLODE\PDF-eXPLODE.exe" -CONTINUETRUE

## ▶ Setup User Accounts on Printer Server

The PDF-eXPLODE Printer Server default configuration provides for all users to share the same settings. Alternatively, the administrator may create a separate user settings file for each user. This procedure must be done on the server. Execute the Turn_Admin_Ini_OFF registry setting in the REG folder and then create individual user settings (the pdfexplode.ini file) with the following command. Replace *username* with the Windows user account name:

"C:\Program Files\PDF-eXPLODE\PDF-eXPLODE.exe" -CONFIGURE"username"

This will open PDF-eXPLODE. You may then select **Options** from the Printer menu and you will see the username displayed in the window title bar. A blank settings file will be created in the INI folder under the user account name and you may edit the options. To edit the administrator's settings use the command:

"C:\Program Files\PDF-eXPLODE\PDF-eXPLODE.exe" -CONFIGURE"administrator"

## ▶ Combine PDF Files

The PDF combine utility can be automated from the command line. Up to five PDF files can be combined using the command:

"Program Path" -CombineOutput"output file pathname" -CombineInput1"input file 1 pathname" ... -CombineInput5"input file 5 pathname"

For example:

"C:\Program Files\PDF-eXPLODE\PDF-eXPLODE.exe" -CombineOutput"C:\Output.pdf" -CombineInput1"C:\Report1.pdf" -CombineInput2"C:\Report2.pdf" -CombineInput3"C:\Report3.pdf" -CombineInput4"C:\Report4.pdf" -CombineInput5"C:\Report5.pdf"

## ▶ View PDF Files

The PDF viewer utility can be automated from the command line. :

"Program Path" "file pathname"

For example:

"C:\Program Files\PDF-eXPLODE\PeXPDFViewer.exe" "C:\MyFile.pdf"

## ▶ PDF Printer Utility

Use the PeXPrintPDF print utility (located in the Program folder) and print a PDF. PeXPrintPDF supports the following command line parameters where the first two parameters are required and the last three are optional:

-PRINT, PDFpathname [,printername] [,#copies] [,password]

For example, "C:\Program Files\PDF-eXPLODE\PeXPrintPDF.exe" -PRINT, "C:\Program Files\PDF-eXPLODE\PDFS\PDFeXPLODE.pdf",HP LaserJet 3300 Series PCL 6

- Omit the printername to use the default printer
- Omit the # of copies to default to 1 copy
- If you skip a parameter, include the comma, for example, to print 2 copies to the default printer use:

"C:\Program Files\PDF-eXPLODE\PeXPrintPDF.exe" -PRINT, "C:\Program Files\PDF-eXPLODE\PDFS\PDFeXPLODE.pdf",,2

# Technical Support

This section details the different aspect to configuring PDF file creation and the mail settings

# System Requirements

- Operating System: Microsoft Windows XP, Windows Server 2003, Windows Server 2008, Windows Vista or Windows 7
- Hard Drive: Minimum 52.5MB of free disk space, plus additional space for PDF files created
- RAM: At least 64MB of available memory, more during PDF creation. The size of the PDF that can be created is limited by the amount of available memory.

# Advanced Configuration

This section descibes in some detail, the available configuration for PDF creation with PDF-eXPLODE.
It also sets out the programming functionality capability of PDF-eCPLODE.

# PDF File Creation Properties

PDF-eXPLODE includes a process that creates PDF files.  While every effort has been made to optimize the resulting PDF files for the widest audience, there may be times where you need to customize the default properties as noted below.
Properties that affect the creation of PDF files are stored in the file named **pdfexplode.properties** located in the PDF-eXPLODE program folder (see [What's Installed Where](#) for the specific location).  The properties file may be edited using the Windows Notepad text editor.  It is highly recommended that a backup copy of the original pdfexplode.properties file be saved before changes are made.

*Note: Properties are case-sensitive.  You must enter them in the case indicated.*

To begin, close PDF-eXPLODE if it is currently open.  Navigate to the PDF-eXPLODE program folder and make a copy of the file named pdfexplode.properties to save as a backup.  Open pdfexplode.properties in Notepad and make changes as necessary and then save the file.

▶ **JPEG Compression**
To further compress any gray or color raster images using the JPEG method use the **-J <quality>** property where <quality> may be a value between 0 and 100 (best).  Note that this option has no effect on text, vector images or black & white images, only gray-scale and color raster images are affected. If using a BMP (for example, a signature), a high value for compression may distort rather than improve quality.

- To reduce the PDF file size and still maintain good quality, set this property as follows:

    -J 60

- To increase quality while increasing file size, set this property as follows:

    -J 70

- To set very high quality while further increasing file size, set this property as follows:

    -J 90

▶ **Paper Size**
To specify a default paper size format use the **-F <format>** property where <format> may be a2, a3, a4, a5, letter or legal.

- To set the default paper size format to letter, set this property as follows:

    -F letter

- To set the default paper size format to A4, set this property as follows:

    -F a4

▶ **Rotate Page**
The page may be rotated for proper onscreen viewing of landscape pages using the **-R <degrees>** property, where <degrees> may be 0, 90, 180 or 270.

- To prevent pages from being rotated, allowing landscape pages to be viewed normally, set this property as follows:

    -R 0

▶ **Text Print Quality**
The dots-per-inch resolution may be varied to affect the quality, size and speed using the **-d <dpi>/<dpi>/<dpi>** property, where <dpi> may be a number between 72 and 600.  The first <dpi> number is text resolution, the second <dpi> number is color graphics and the third <dpi> number is monochrome graphics.  In general, a higher value for <dpi> will produce higher quality output but will cause PDF-eXPLODE to use more memory and take longer to create a PDF file and the resulting file will be larger.

- For draft quality office work at a resolution of 150 dpi, set this property as follows:

    -d 150/150/150

- For higher quality output, for example if your PDF result shows slightly misplaced characters in text (usually horizontally by a tiny amount),  set this property to 300 dpi as follows:

    -d 300/150/200

-

For the highest quality output, for example if your PDF contains high-resolution graphics, set this property to 600 dpi as follows. Setting text resolution greater than 300 is not recommended:

    -d 300/600/600

# Programming Functions

Programming functions allow you to manipulate and format the contents of variables within an e-mail subject or message if mail-merge is enabled. They work in both text and HTML messages if you have selected **Use variables in e-mail** on the Variable Settings screen. The following functions are supported. The names are not case-sensitive, but you must not insert any spaces between the function name and the open parenthesis.

▶ **Keywords**

- **<<Date>>:** Insert the current date. Format a date using the FormatDate() function described below.
- **<<Time>>:** Insert the current time.

▶ **Functions**

- **FormatDate():** Format a date by supplying a format code. For example, to format a date in variable 1 in mm/dd/yyyy format, insert **FormatDate(<var1>, "mm/dd/yyyy")**. The variable must be a number containing 4, 6 or 8 characters, or the date parts can optionally be separated by a punctuation character such as slash (/), dot (.), hyphen (-) or comma (,). For example, the value 12102013 would be interpreted as December 10, 2013

▶ **Tips**

The following format codes can be used. Note that the codes are case sensitive and must be enclosed within double quotes and may contain slash (/) or hyphen (-) as a separator.For example: "ddmmyyyy", " yyyymmdd" "dd/mm.yyyy" or "dd-mm-yyyy".

| d | Displays the day as a number without a leading zero (for example, **1**). Use **%d** if this is the only character in your user-defined date format. |
|---|---|
| dd | Displays the day as a number with a leading zero (for example, **01**). |
| ddd | Displays the day as an abbreviation (for example, **Sun**). |
| dddd | Displays the day as a full name (for example, **Sunday**). |
| M | Displays the month as a number without a leading zero (for example, January is represented as 1). Use **%M** if this is the only character in your user-defined date format. |
| MM | Displays the month as a number with a leading zero (for example, **01**/12/01). |
| MMM | Displays the month as an abbreviation (for example, **Jan**). |

- **NDays()**: Calculate the number of days between two dates. For example, NDays(2012/01/01,<<Date>>) will calculate the number of days since January 1, 2012. If you omit the second date it is assumed to be the current date. The order of the two dates does not matter - the result is always a positive number. For example, NDays(2013/01/01,2013/12/31) and NDays(2013/12/31,2013/01/01) will both return the number of days in the year, 365. Note that date constants should be entered in the format YYYY/MM/DD.

- **VSplit():** Extract a portion of a variable, delimited by hyphen (-). For example, assuming variable 2 contains the text *Apples-Oranges-Bananas*, **VSplit(<var2>,3)** returns the third term, in this case, *Bananas*.

- **MSplit():** Extract a portion of a variable, specified by the starting position and number of characters. For example, assuming variable 2 contains the text Apples-Oranges-Bananas, **MSplit(<var2>,16,7)** returns the seven characters beginning at position 16, in this case, *Bananas*. If you omit the length of the substring to extract it is assumed to be the length of the string starting at the specified position. Using the previous example, **MSplit(<var2>,16)** also returns *Bananas*.

- **Upper()**: Convert a character string into all uppercase letters. For example, assuming variable 1 contains the text *Apples*, **Upper(<var1>)** returns *APPLES*.

- **Lower()**: Convert a character string into all lowercase letters. For example, assuming variable 1 contains the text *Apples*, **Lower(<var1>)** returns *apples*.

- **Proper()**: Convert a character string into proper case format, i.e. initial caps. For example, assuming variable 1 contains the text *john smith*, **Proper(<var1>)** returns *John Smith*.

- **Replace()**: Replace one character string with another character string. For example, assuming variable 1 contains the text *Apples-Oranges-Bananas*, **Replace(<var1>,"Oranges","Grapes")** results in the text *Apples-Grapes-Bananas*. The double quotes are optional, so the same result could be achieved using **Replace(<var1>,Oranges,Grapes)**.

- **Trim()**: Trim leading and trailing spaces from a character string. For example, assuming variable 1 contains the text "   *john smith*   ", **Trim(<var1>)** returns "*john smith*".

▶ **Tips**

You can nest functions. The order of evaluation is important. First variables are expanded and then keywords and functions are evaluated in the following order:

- <<Date>>
- <<Time>>
- FormatDate()
- Replace()
- Trim()
- VSplit()
- MSplit()
- Upper()
- Lower()
- Proper()
- NDays()

# Fast Start Guide

The purpose of this help topic is to assist users who want to use PDF-eXPLODE to send an e-mail as soon as possible after installing the product before reviewing all the options and capabilities of PDF-eXPLODE.

Please note the default paper size supported by PDF-eXPLODE is Letter.  If your paper size is different, for example A4, you must edit the PDF File Creation Properties and set the appropriate Paper Size before proceeding.

## Mail Settings

To send e-mails using PDF-eXPLODE, you must set up an e-mail account much like you would in an e-mail client program such as Microsoft Outlook. The steps below are designed to get Microsoft Outlook users going quickly.  Refer to the Mail Settings help topic for general documentation.

To begin, start PDF-eXPLODE.

▶ **Open Mail Settings**

1. On the **Printer** menu, click **PDF-eXPLODE Options...**.
2. In the Options List, click **Mail Settings**.  You will see the two tabbed forms displayed in the right-hand pane of the PDF-eXPLODE window: **Default E-mail Setting** and **E-mail Connection Setting**.

▶ **Default E-Mail Setting**

Enter the default e-mail **Subject** and **Message Text** you want to appear when your e-mail is viewed by recipients.  You can change them each time you send e-mail using PDF-eXPLODE, or you can create Subject/Message definitions that are associated with specific types of mailings such as monthly statements or invoices (called Default Message ID Tags)  or with specific recipients (called Client-specific Message ID Tags).

▶ **E-Mail Connection Settings**

Click the tab labeled **E-mail Connection Setting**. To prepare Microsoft Outlook to lookup the proper settings, perform the following steps. Leave the Outlook screen open to refer to as you fill in the PDF-eXPLODE Mail Settings.

1. Open Microsoft Outlook.
2. Click **E-mail Accounts** on the **Tools** menu.
3. Select **View or change existing e-mail accounts** and click **Next**.
4. Select the e-mail account you wish to use and click **Change**.
5. You will see a dialog box like the one below.

**PDF-eXPLODE**

Fill in the following fields in PDF-eXPLODE as described:

- **Sender Name:** Refer to the Microsoft Outlook screen and enter the value from **Your Name** (e.g. John Smith) followed by a space, followed by the value from **E-mail Address** within angle brackets (e.g. John Smith <jsmith@pdfexplode.com>.
- **Reply To:** By default this will be the email address part (within the <> brackets); however you can nominate any address to which a "Reply" e-mail will be directed.
- **Outgoing Mail SMTP Server:** Refer to the Microsoft Outlook screen and enter the value from **Outgoing mail server (SMTP)**.
- **Sign-on Username:** Refer to the Microsoft Outlook screen and enter the value from **User Name**.
- **Password:** Refer to the Microsoft Outlook screen and enter the same **Password**. Note that passwords are displayed as asterisks and stored encrypted for security.

For the next field on the PDF-eXPLODE screen, click the **More Settings...** button in Microsoft Outlook to bring up the following dialog window, and click on the tab labeled **Advanced**.
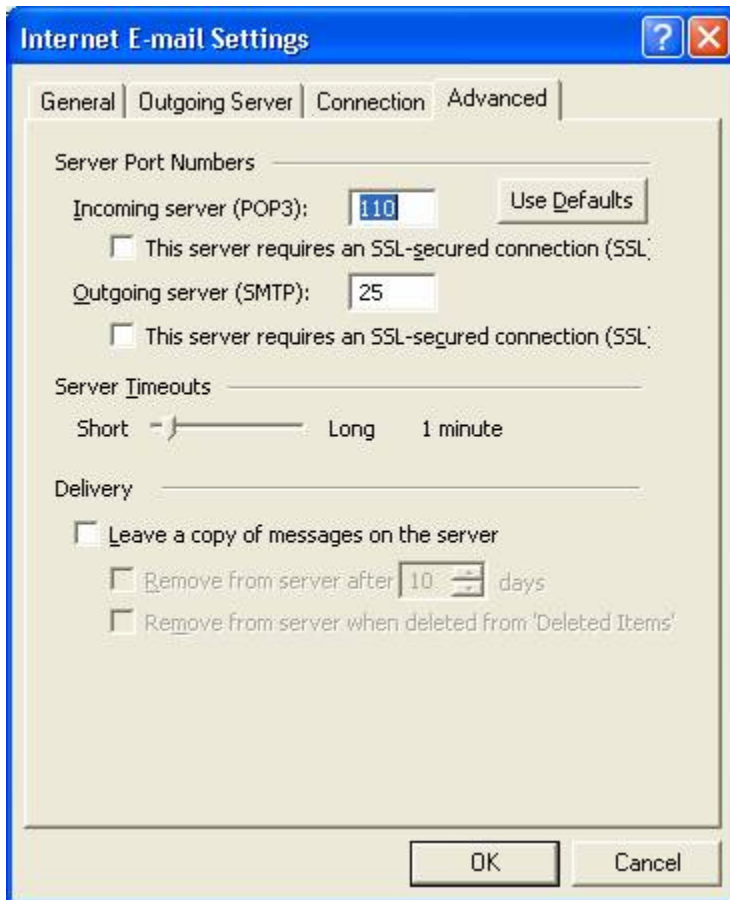
- **Port:** Refer to the Microsoft Outlook screen and enter the value from **Outgoing server (SMTP)**.

For the next fields on the PDF-eXPLODE screen, in Microsoft Outlook click on the tab labeled **Outgoing Server** to display the following dialog.

- **Authentication Type:** Refer to the Microsoft Outlook screen and:
  - If the box labeled **My outgoing server (SMTP) requires authentication** is not checked, select **None**, otherwise if it is checked:
  - If the Option labeled **Use same settings as my incoming mail server** is selected, select **Login**.
  - If, when you try sending an e-mail using the **Login** setting, the e-mail does not get sent, select **Plain** instead of **Login**.
  - If the option labeled **Log on to incoming mail server before sending mail** is selected, select **POP**.
- **Incoming Mail (POP3) Server:** Refer to the Microsoft Outlook screen and if the box labeled **My outgoing server (SMTP) requires authentication** is checked and the option labeled **Log on to incoming mail server before sending mail** is selected, click **Cancel** in Microsoft Outlook return to the previous screen and enter the value from **Incoming mail server (POP3)**. Otherwise, leave this field blank.
- **Delay each E-Mail:** you can optionally set a delay (in seconds) between each e-mail sending so as to allow the e-mail server to recover between each "send". This is especially recommended with slow and/or busy servers which take some time to send the e-mail thereby putting the e-mail send at risk of timing out. A maximum of 2 seconds should not be exceeded as a delay time on large e-mail sending batches.
- **Security Protocol:**  Where the SMTP server requires "an SSL secured connection" you would check **SSL**. This refers to an (implicit) secured connection where a connection is established when the e-mail is about to send. You will need to use **StartTLS** where an explicit secured connection is created BEFORE SMTP server handshaking protocol begins. This connection is used mostly with Cloud based SMTP servers.
- Your e-mail connection settings should now look like this:

- Click **Test Connection** and check the sender name e-mail account (jsmith@pdfexplode.com in this example) to ensure the test e-mail was delivered and received. If you do not receive the test e-mail, chances are the settings are incorrect. You may need assistance from your e-mail administrator to ensure the settings are correct.
- Click **Save** to save your settings.
- On the **Printer** menu, click **Exit** to close PDF-eXPLODE.

## E-mailing a Document

At the heart of PDF-eXPLODE is the ability to explode, or separate, a PDF file into individual PDF files to e-mail different people different sections of a document.

To get your documents where they need to go, you need to inset PDF-eXPLODE tags in the documents to indicate which settings to use when exploding and e-mailing documents.

▶ **Tagging a Document**

- Open a short test document in a program such as Microsoft Word or Crystal Reports.
    - In the page header, or at the top of the page, type a PDF-eXPLODE e-mail tag in the following format, replacing the example e-mail address with your own e-mail address.<pdfexplode>jsmith@pdfexplode.com</pdfexplode>
- If you are using Crystal Reports, make sure the entire tag is visible. (Hint: Click and drag the right handle of the text object all the way to the right margin.)
- A tag must fit entirely on a single line. Position the tag starting at the left margin. Apply a smaller font size if necessary.
- Apply the Times New Roman font to the entire tag.
- You may change the color of the tag to white to make it invisible in the resulting document. However, we recommend leaving the color black so the tag is visible until you have fully tested the document.
- The case of the open <pdfexplode> tag and the close </pdfexplode> tag must match, so always use lowercase to be safe.
- Do not include spaces within a PDF-eXPLODE tag.
- Only pages that begin with a PDF-eXPLODE tag will be included in the PDF file attached to the e-mail.
- All the pages associated with the same e-mail address will be combined into a single PDF file.

## ▶ **Printing to PDF-eXPLODE**

PDF-eXPLODE will create, explode and e-mail PDF files. The following instructions assume you will create the master PDF with PDF-eXPLODE. However, if you have an existing PDF created by another process, you can still use PDF-eXPLODE to explode and e-mail it - refer to the instructions for using PDF-eXPLODE from a command line.

**PDF-eXPLODE**

- Set the document to print to the PDF-eXPLODE printer.
- Print the document. For testing purposes, we recommend that you select just a few pages.
- If you have not configured PDF-eXPLODE to e-mail in "Silent Mode" in General Settings and the following dialog appears, select **Explode Now** and then click **Save**.



▶ **View the Resulting E-mail**

You may view the PDF file you just e-mailed yourself if you have a PDF viewer such as the free Adobe Reader, available at www.adobe.com.
 If you do not have a PDF viewer installed, PDF-eXPLODE includes its own viewer named PeXPDFViewer, which is fast and simple to use. PeXPDFViewer can be accessed from the program folder, from the Logging and Utilities screen, or from a command line. To set PeXPDFViewer as your default PDF viewer, right-click a PDF and select **Open With**, select **Choose Program**, navigate to the PDF-eXPLODE program folder and select PeXPDFViewer.exe. Make sure the checkbox labeled "*Always use the selected program to open this kind of file*" is checked.

1. In your e-mail inbox, locate the e-mail you just sent yourself.
2. Open the e-mail and then open the PDF attachment. If you want to use Foxit Reader, first save the PDF attachment to a disk file.
3. Close your PDF viewer when done.

▶ **Troubleshooting**

- It is a good idea to check the PDF-eXPLODE Log Files to be sure no errors occurred sending the e-mails.  Log files are accessible from the General Settings screen.
- Check the Inbox for the e-mail account in the Sender Name field of the PDF-eXPLODE Mail Settings where you may find return e-mails when delivery problems occur.  Delivery errors may result if you typed the e-mail address incorrectly in the document you printed to PDF-eXPLODE.
- The default paper size supported by PDF-eXPLODE is Letter.  If your paper size is different, for example A4, you must edit the PDF File Creation Properties and set the appropriate Paper Size.

# PDF-eXPLODE Developer's Website
Please click here to visit this site



**[PDF-eXPLODE Developer's website]**

PDF-eXPLODE has been in the market for close to seven years. During that time the product has evolved such that it is now one of the best feature rich product in the market.

# About 3000AD Systems



**v4.0.15.97 Nov 2014**

3000AD Systems, an incorporated company, commenced business in March 1999 in Sydney Australia. At 3000AD Systems, we are committed to excellence in product delivery and customer service. Our vision is the delivery of innovative, time and cost saving products to market. Our business partners are our Clients who we work with to supply superior (and simple) solutions to complex problems. We believe our products represent the best value for money and we back them up with excellent support services - just ask any of our Users.  Here is what some of our Users say:

*".... It goes without saying that the savings in time, postage and labor paid for the system within a short space of time. And the after sales support from 3000AD Systems, developers of the product, is courteous, fast and second to none."*

**Robert Jurewicz**
Business Development Coordinator
GARDENS HOME MANANGEMENT SERVICES, Florida USA

*"PDF-eXPLODE support has been excellent. PDF-eXPLODE is a program that does what it says it's going to do. The bottom line is it works and saves me a tremendous amount of time on a weekly basis...."*

**Brad Barron, R.Ph.**
Pharmacy Systems Coordinator
Bashas Grocers, Arizona USA

*"... It is saving two of my customers HOURS AND HOURS of time every month - and the support is superior. Prompt responses to emails and questions, and a tireless search for the best solution to any problem we may have encountered. Do not hesitate to buy and use PDF-eXPLODE."*

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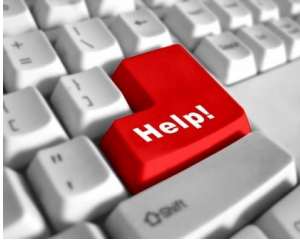www.crystalreportsgoddess.com,
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# Support Desk



We have developed the following support options that take advantage of our highly acclaimed service at very affordable prices. If PDF-eXPLODE is a business critical process then we strongly recommend you consider your options below.

You have a choice of service types as follows:

## 1. Priority Paid Support

Our premium priority annual support contract with turnaround times of up to 48 business hours or less. Priority Support is provided at no charge during the startup period of the first 60 days following purchase. Once 60 days have elapsed, Priority Support is available for purchase for a 12-month period provided that Priority Support has been purchased for all current licenses and includes:

- Help installing, configuring and validating proper operation of PDF-eXPLODE software.
- Help diagnosing and solving problems with PDF-eXPLODE software where the software does not perform as advertised or documented.
- Product updates (e.g. V 4.0 to V 4.1) and temporary fixes but not major upgrades (e.g.V 4 to V 5).
- Responses will be made by e-mail, phone or Skype at the support provider's discretion and may require use of a remote connection to the customer's PC.
- A response will be provided within 24 hours from the time of initial contact, excluding weekends and holidays.

## 2. Per-incident Support
Priority support will be provided on a per-incident basis for US $150 in the event the start-up period has passed and Priority Support has not been purchased.

## 3. Free Support

Priority Support (see definition #1 above) will be provided at no charge during the Startup Period, defined as the first 60 days beginning on the date of purchase of a product license. After the start up Period, free support will be limited to:

- Self-service using resources provided on the product website.
- License activation reset for the purpose of re-imaging the disk on which PDF-eXPLODE was installed or moving the license to a different PC
- Providing a download link for the current or previously purchased versions of the PDF-eXPLODE setup program
- Customer database lookup/update of contact information, license ID and password
- Re-send a copy of an invoice

## Search the Knowledge Base

[PDF-eXPLODE Knowledge Base](#)

The Knowledge Base covers in excess of 30 articles spread over Installing, Licensing, Configuring, Processing, Emailing, Archiving and Tips. It provides detailed solution instructions.