

V6

Document Exporter for Outlook

Export emails to PDF/XPS/DOC/MHT/HTM





Welcome to Document Exporter for Outlook- A fast, light-weight add-in for Microsoft® Outlook® that makes it easy and effortless to generate PDF, XPS and other document formats right out of your emails, either manually or automatically. The add-in is an elaborate help documentation that will guide how to work with Document Exporter for Outlook.

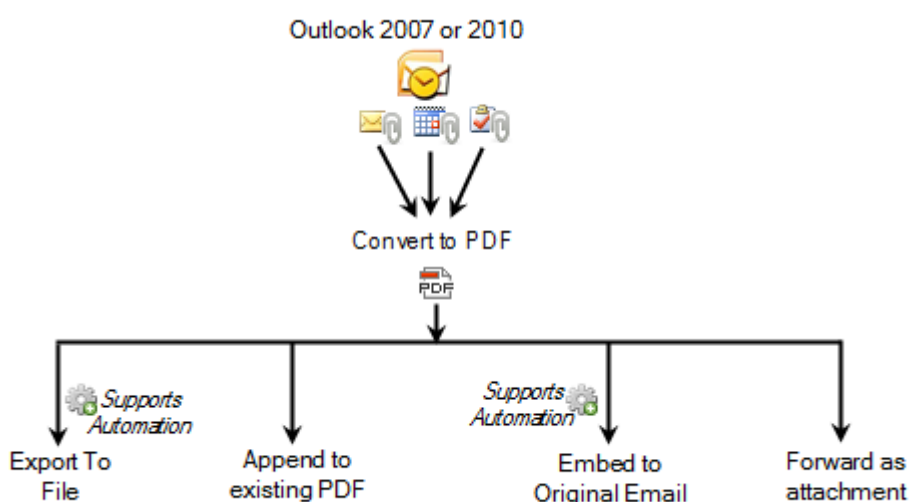
For a quick overview, refer to our [video demonstration](#) available on the product website.

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1. Introduction to Document Exporter

Document Exporter brings support to export Microsoft Outlook items like emails, tasks, appointments and their attachments among others to PDF, XPS and other widely used formats. It can batch convert multiple items to multiple PDF documents in just a single click. Also, it allows merging of the items into a single PDF document. Regardless of the method you use, Document Exporter preserves all the inline or embedded images, hyperlinks and even attachments in the generated PDF documents. Adding to the productivity, you can even automate Document Exporter to generate the PDF files from incoming emails without your actual intervention.



Why another add-in?

Microsoft Office applications can now save documents to PDF/XPS by downloading and installing the FREE '[Microsoft Save as PDF or XPS Add-in for 2007 Microsoft Office programs](#)'. However, unlike other applications in the Office suite, the world most popular email client Microsoft Outlook unfortunately cannot leverage these widely used document formats. As a result, most of us have to either rely on Adobe Acrobat plug-in for Outlook (yes, it costs a lot!) or, have to copy-paste the content of the email to Microsoft Word or convert to PDF/XPS which will eat your precious time.

Document Exporter is designed to bridge this gap by bringing the PDF/XPS support in Microsoft Outlook thereby leveraging your existing investment in Microsoft Office suite.

How does it work?

Internally, Document Exporter makes use of Microsoft Office applications namely Word, Excel, PowerPoint and the likes of to perform the processing/export thereby enabling you to save emails to PDF, XPS and other popular formats such as DOC, DOCX, MHT, ODT and filtered web friendly HTML as well. Using Microsoft Word is totally transparent to the user

and is thread safe-which means your current opened documents in Microsoft Word are not affected.

Automatic Export

With version 4, you can now automatically set Document Exporter to monitor any number of Outlook folders or mailboxes, for real-time document generation from incoming emails or newly added appointments or tasks. It also supports appending the new Outlook items to a single PDF existing file to generate an e-book.

Attachments to PDF

With version 5, Document Exporter can now output attachment files to PDF files. It can generate each attachment to individual PDF, merge all attachments to a single PDF and can also append all the attachments to the PDF file of the email.

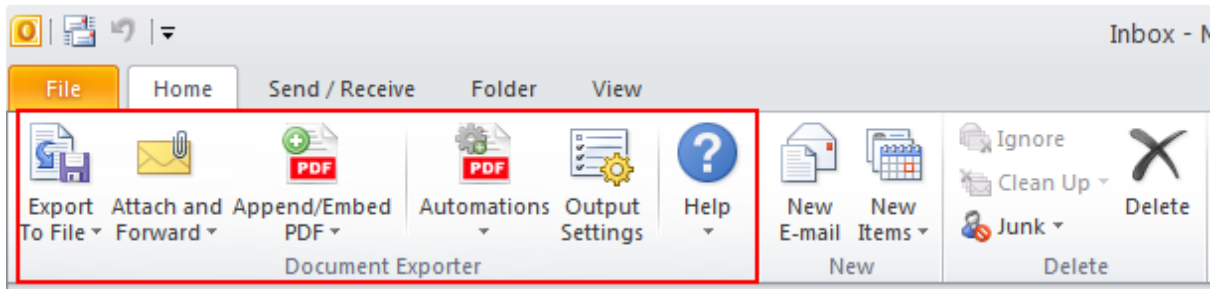
2. Features

- ✔ Seamless integration with Microsoft® Office Outlook
- ✔ Supports export to the following document formats:
 - **Adobe Portable** document (.pdf)
 - **XML Paper Specification** document (.xps)
 - **Microsoft® Word** document (.doc)
 - **Microsoft® Word 2007** document (.docx)
 - **Rich Text** Format (.rtf)
 - **OpenDocument** Text (.opdt)
 - **Web-archive** single page (.mht)
 - Filtered webpage (.htm)

- ✔ Works with **mail, appointment** and **task items**
- ✔ Preserves **inline images** and **hyperlinks** in the output
- ✔ Images with HTTP URLs are automatically saved locally and the links updated to make them available in the generated documents.
- ✔ Process multiple emails, appointments or tasks in **batch mode** and export to **multiple documents**.
- ✔ Use a generic incremental name or the subject of the email, appointment or task to name the output files generated in batch mode.
- ✔ **Merge multiple emails, appointments or tasks into a single document.**
- ✔ Convert selected emails, appointments or tasks into a supported document format and automatically attach them to a new email.
- ✔ Optionally, allow to **export attachments to a subfolder**. You can control if not to save the inline images and hidden attachments.
- ✔ **Append** the selected Outlook items to **an existing PDF file**
- ✔ **Real-time monitoring** and **automatic export** of incoming emails/new items of an Outlook folder or mailbox to a user specified document format such as PDF/XPS/DOC and other formats
- ✔ Optionally, **maintain a single PDF file** on automatic export, on which, every new Outlook item received or added (in the Outlook folder or mailbox) will be appended over this single PDF file
- ✔ Special **MSI** installer available for enterprise wide deployment (upon request)
- ✔ Supports and optimized for the new Microsoft Office 2010
- ✔ **Dynamic naming scheme** for generated documents, by using metadata information from the Outlook item (e.g. Subject, Received Time, Sender....)
- ✔ Convert **attachments to PDF**, either to their respective individual file or merged to a single file
- ✔ Automatically **embed PDF version of the attachment files** back to the original Outlook item for easy viewing on iPad, iPhone and other tablet devices

3. Ribbons/Toolbars in Outlook

Once installed, Document Exporter appears as a ribbon in Outlook 2010. However, in Outlook 2007 and 2003, it exists as toolbars.

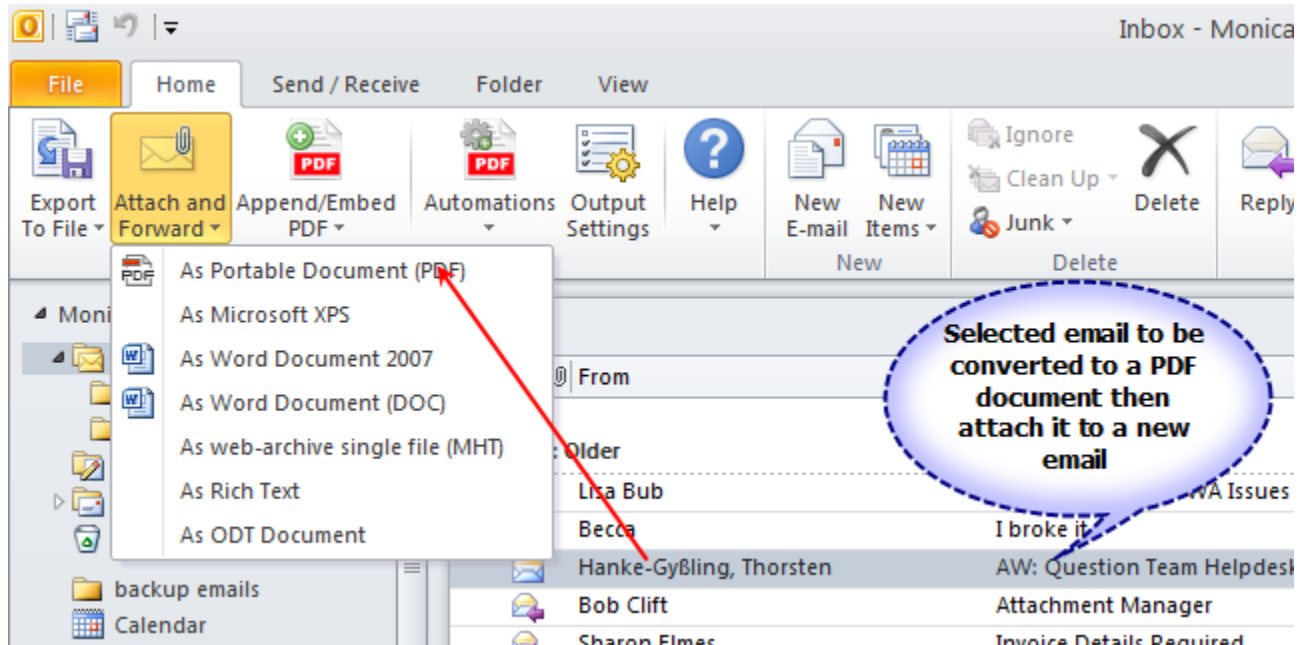


Document Exporter supports the following two mode of operation: single and batch processing. The output document format available in the '**Attach and Forward**' and '**Export**' menus depend on the number of selected items in the current Outlook folder.

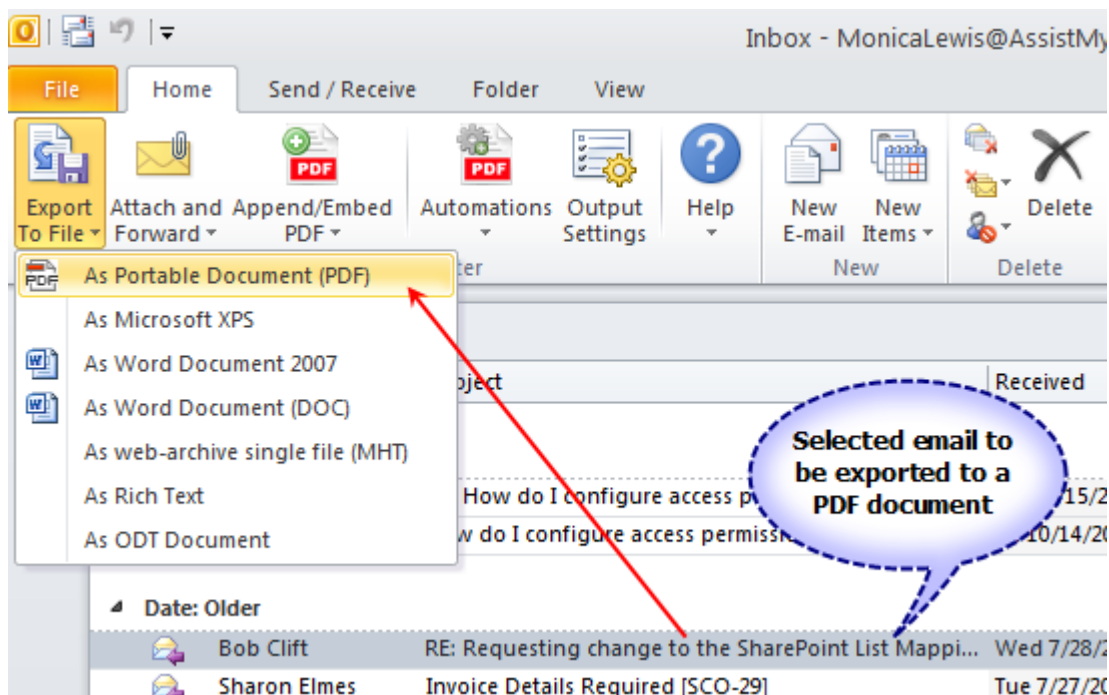
With version 4, Document Exporter also supports adding and appending the selected Outlook items to an existing PDF file. (**Add to existing PDF...**). In addition, it also supports automating the document generation from incoming emails or new items from an Outlook folder. For more, refer to the section '**Automation – automatically process incoming mails/new items to a document format**'

4. Converting a single email (or any Outlook items) to PDF or other document formats

Attach and Forward: The first drop down button on the toolbar is called Attach and Forward, and you can see that you can convert the selected email to Microsoft Word, Web Archive, Adobe PDF or XPS document and, then attach it to a new email automatically.

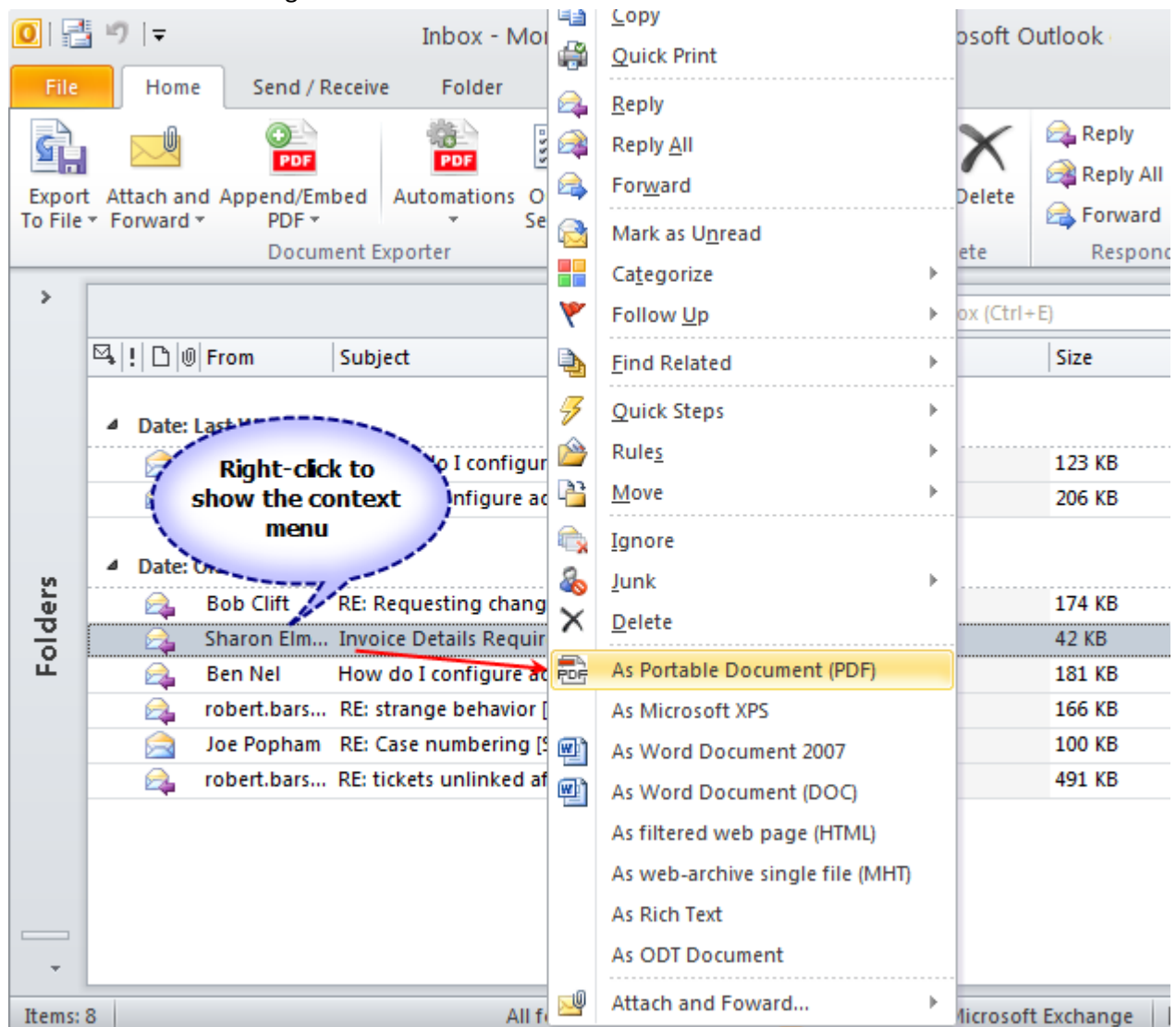


Export: The second drop down button Export would allow you to save the converted document to your local folder.

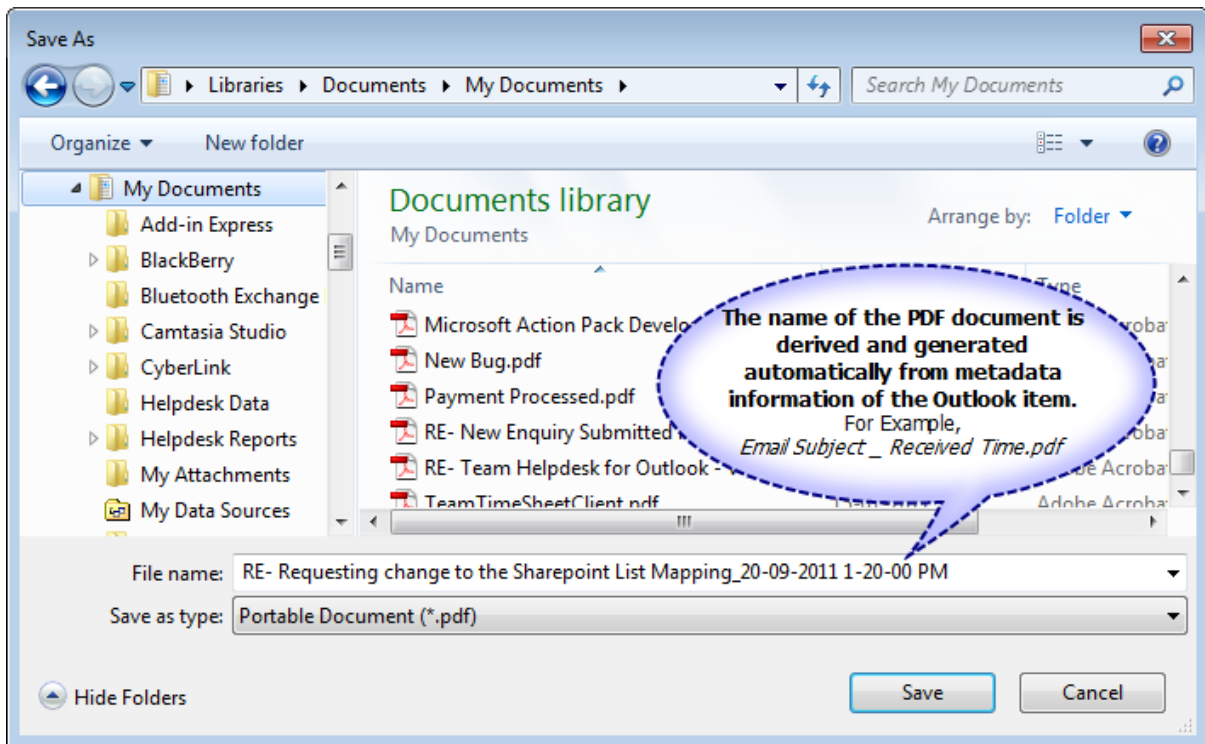


In Outlook 2010, these menu items are available under the context menu (i.e., pop-up menu you get when you right-click the selected items).

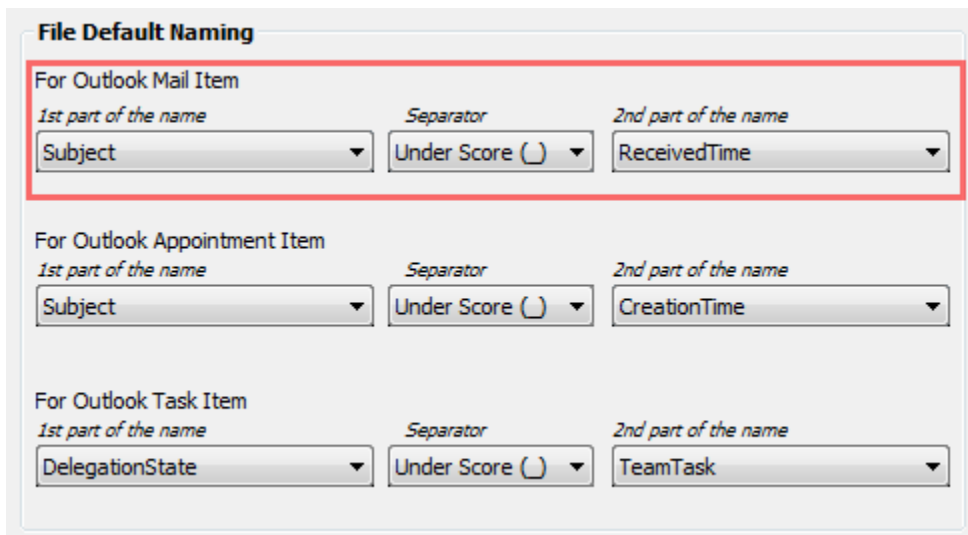
Context menu when a single item is selected:



After that, you can export the selected email or any Outlook items to a PDF or other support document formats. In the 'Save As' dialog, the file name of the document to be generated is pre-filled with metadata information of the selected email or any other selected Outlook item. For example, in the given below screenshot, the file name is in the format *Subject + Underscore (_) + Received Time*. In this way, you don't even need to input and key in the name of the document.



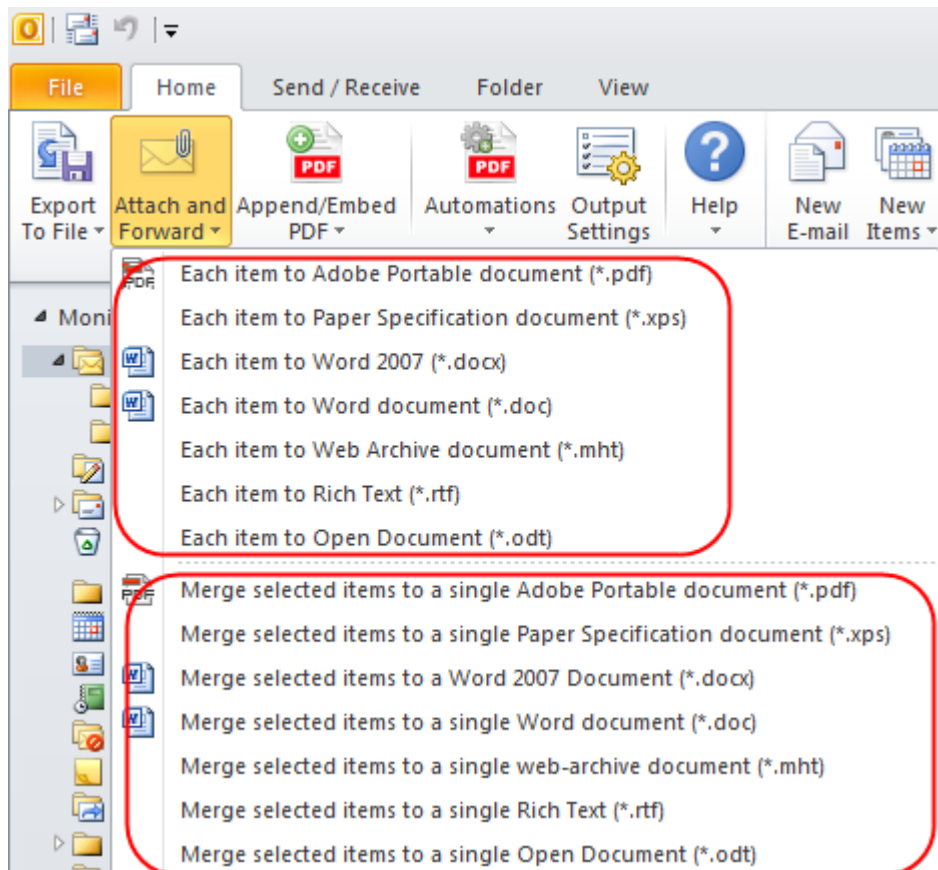
Of course, you can customize what metadata information is used from the email or the Outlook item to name the generated document from *Outlook > Document Exporter toolbar/ribbon > Settings*. You can customize the default naming scheme for different type of Outlook items such as mails, appointments or tasks separately.



5. Converting multiple emails in batch to a PDF or other document formats

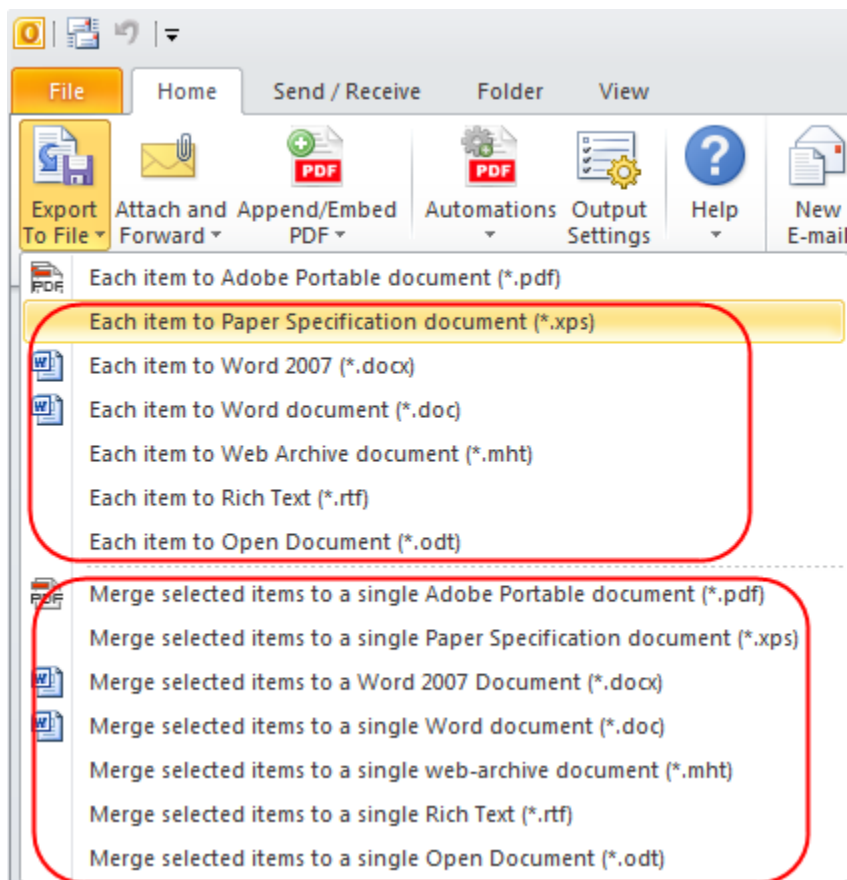
Attach and Forward: The output document format available on the 'Attach and Forward' and 'Export' menus depend upon the number of selected items in the current Outlook folder.

When you select multiple emails or any Outlook items, the drop down options under the 'Attach and Forward' will change reflecting the several ways of batch processing the emails or the other items.



1. Generating individual PDF or document format from each of the selected email or Outlook item in batch is one of the striking options.
2. Merging all selected emails into one, and then converting it to a single PDF or document format is another option.

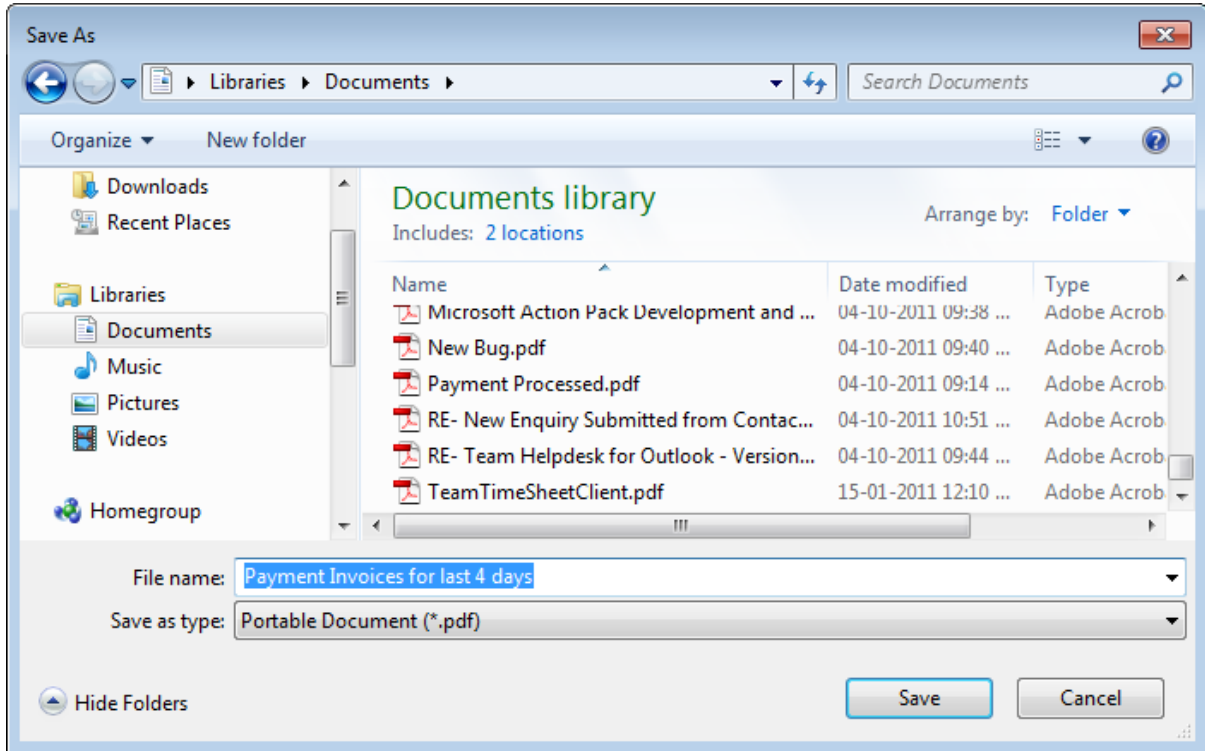
Export: Similarly, when you select multiple emails, the 'Export' drop down button will appear like given below screenshot:



1. Converting each selected email to a corresponding document format in batch. Merging all selected emails into one, and then converting those to a single PDF or document format is another option. With this Batch Export, you also have the option to choose what file title the generated documents would take - either a defined generic name or use the subject of the Outlook item.

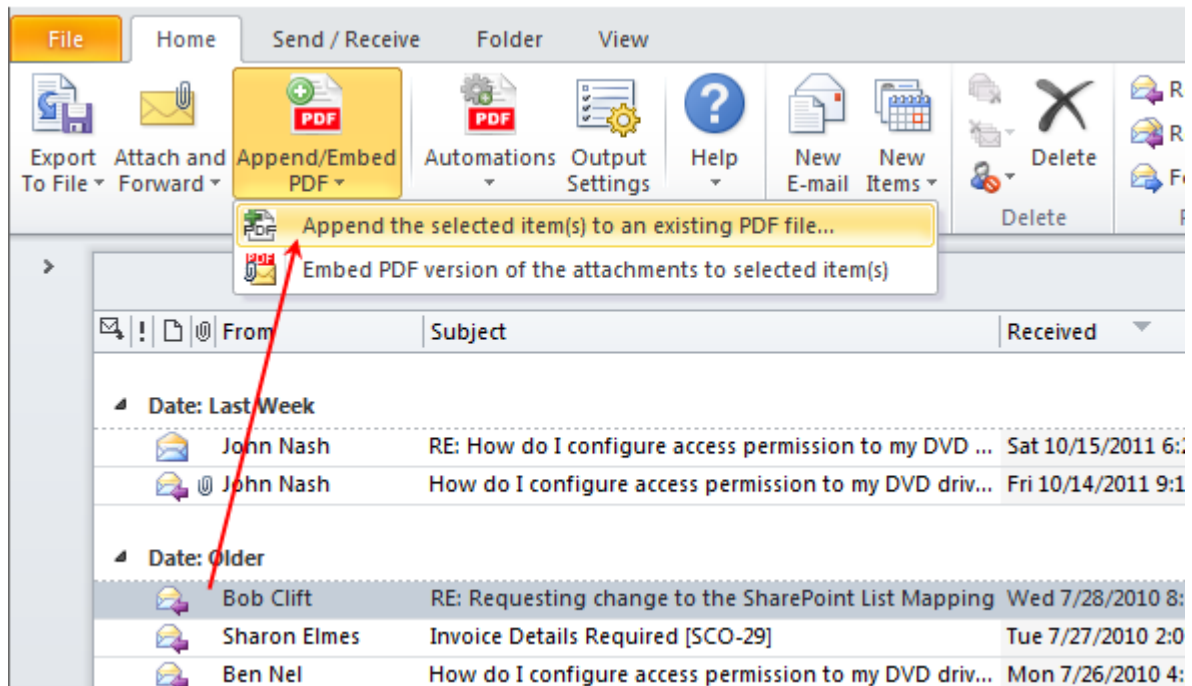
2. When you select 'Merge all selected emails into one' you will get a Prompt Dialog. In the prompt dialog, you can specify a filename and the folder location to save the single

document. Please have a look into the below screenshot:



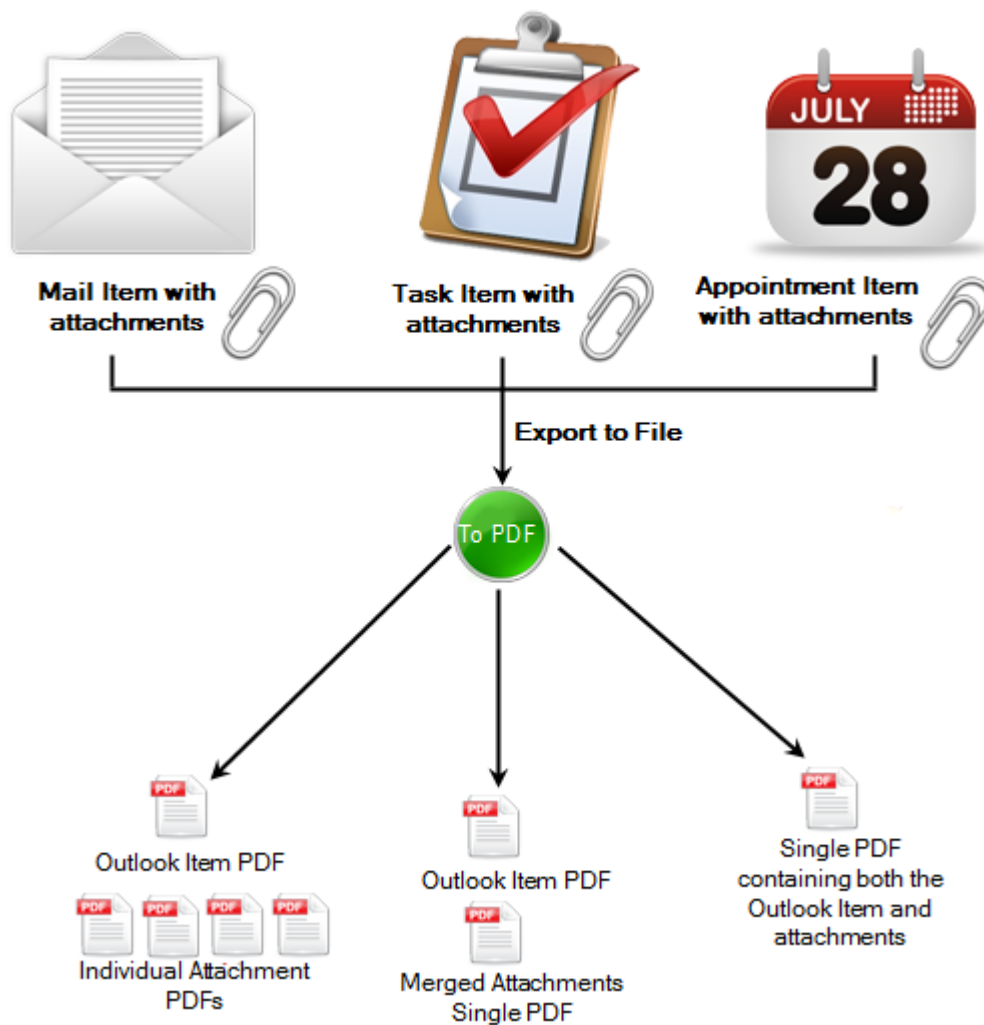
6. Appending selected Outlook items to an existing PDF file

With version 4, Document Exporter now supports appending any selected Outlook items, single or multiple, to a specified existing PDF file. The selected items will be converted to PDF format and would be appended at the end of the specified existing PDF file.

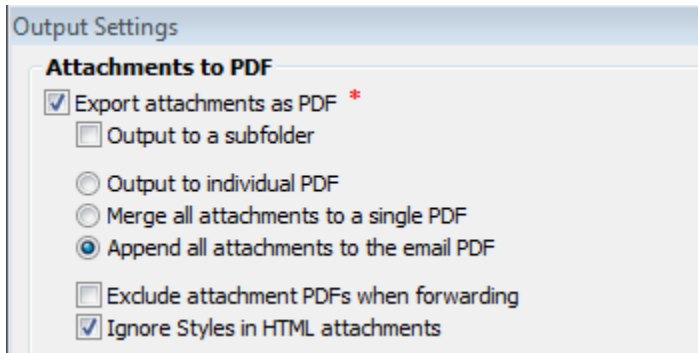


7. Converting attachments to PDF

No matter what form of attachments is in your email or any other Outlook items, now through Document Exporter you can simply convert any kind of attachments to PDF.



Now, you can set Document Exporter add-in to include attachments when generated PDF document from Outlook items. There are three ways to output attachments into PDF - as separate PDF file for each attachment, or, merge all attachments to a single PDF file, or merge all the attachments along with the email content to one single PDF file. Whether the attachments are Word, Excel, PowerPoint, Web, images or simply plain text documents, Document Exporter would automatically convert to PDF.



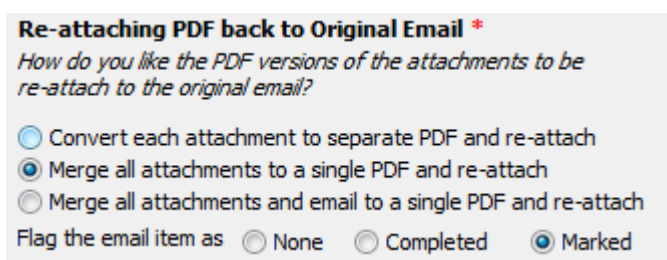
Attachment formats that are supported for conversion to PDF files:

- Word Files (*.docx, *.docm, *.doc, *.dot, *.dotx, *.dot, *.dotm)
- Excel files (*.xl, *.xlsx, *.xlsm, *.xlsb, *.xlam, *.xltx, *.xltm, *.xls, *.xlt, *.xla, *.xlm, *.xlw)
- PowerPoint Presentation files (*.pptx, *.ppt, *.pptm, *.ppsx, *.pps, *.ppsm, *.potx, *.pot, *.potm, *.odp)
- Images (*.bmp, *.gif, *.png, *.jpg, *.jpeg, *.tif, *.tiff, *.pcx, *.psd)
- Single File Web Page (*.mht; *.mhtml)
- Web Page (*.htm; *.html)
- Rich Text Format (*.rtf)
- Plain Text (*.txt; *.prn; *.csv)
- XML Document (*.xml)
- OpenDocument Text (*.odt)
- Works 6.0 - 9.0 (*.wps)

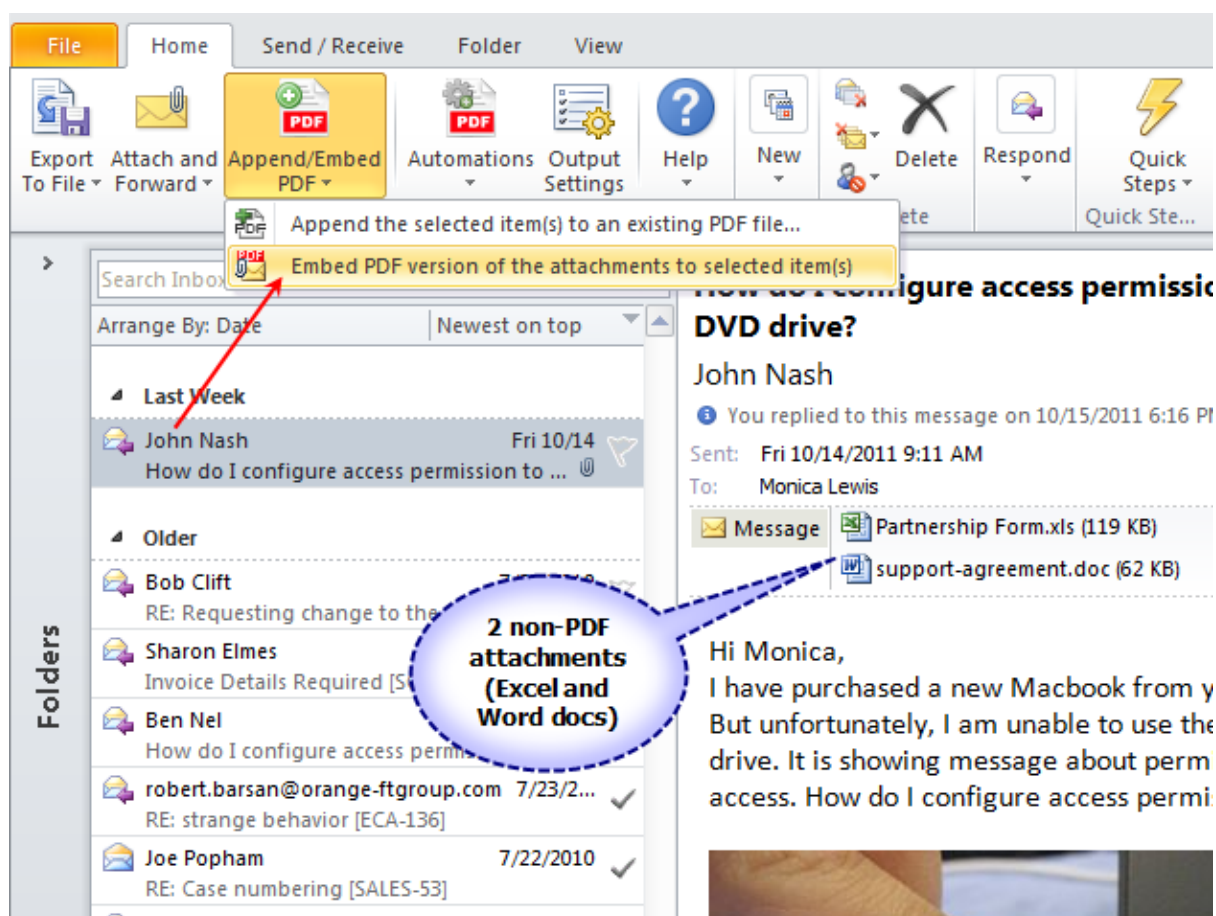
8. Embed PDF version of the attachments back to the Outlook item

Inability to view various attachment file formats within an email is a common problem for those who own an iPad, iPhone or other tablet devices. PDF format support is, however, built-in natively in most of these devices and you can easily preview the PDF attachment within the email. Keeping this limitation in mind, Document Exporter now supports embedding the PDF version of the attachments back to the email item, so that you can easily preview all the non-PDF attachments in your hand-held device. You can choose to merge all attachments to a single PDF, or to separate PDF files, and embed to the original email.

PDF embedding options under Output Settings:



Email before embedding the PDF version of the attachments:



Email after embedding a single PDF version, merged of all the attachments:

How do I configure access permission to my DVD drive?

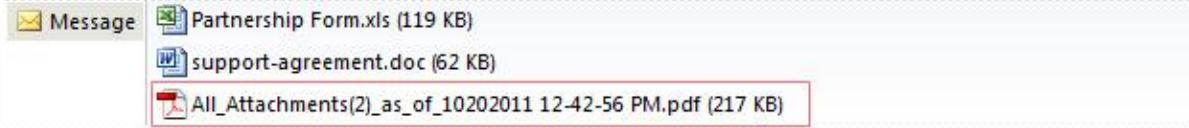
John Nash

Follow up.

You replied to this message on 10/15/2011 6:16 PM.

Sent: Fri 10/14/2011 9:11 AM

To: Monica Lewis



Hi Monica,

I have purchased a new Macbook from your store. But unfortunately, I am unable to use the C drive. It is showing message about permission for access. How do I configure access permission?



A single PDF merged from the 2 attachments (excel and word docs)

Email after embedding separate PDF version of each non-PDF attachment:

How do I configure access permission to my DVD drive?

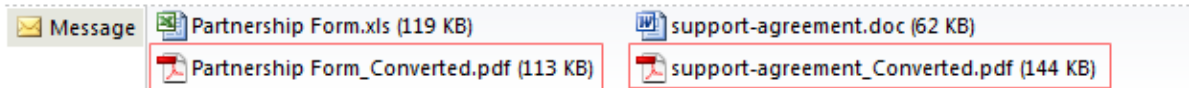
John Nash

Follow up.

You replied to this message on 10/15/2011 6:16 PM.

Sent: Fri 10/14/2011 9:11 AM

To: Monica Lewis



Hi Monica,

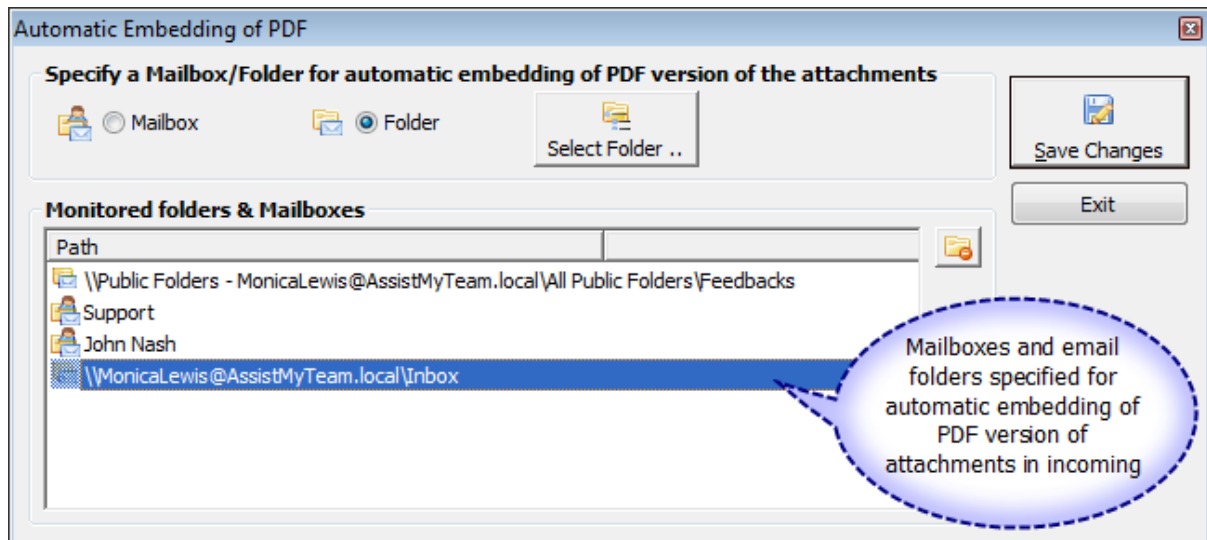
I have purchased a new Macbook from your store. But unfortunately, I am unable to use the C drive. It is showing message about permission for access. How do I configure access permission?



PDF version of each non-attachment embedded

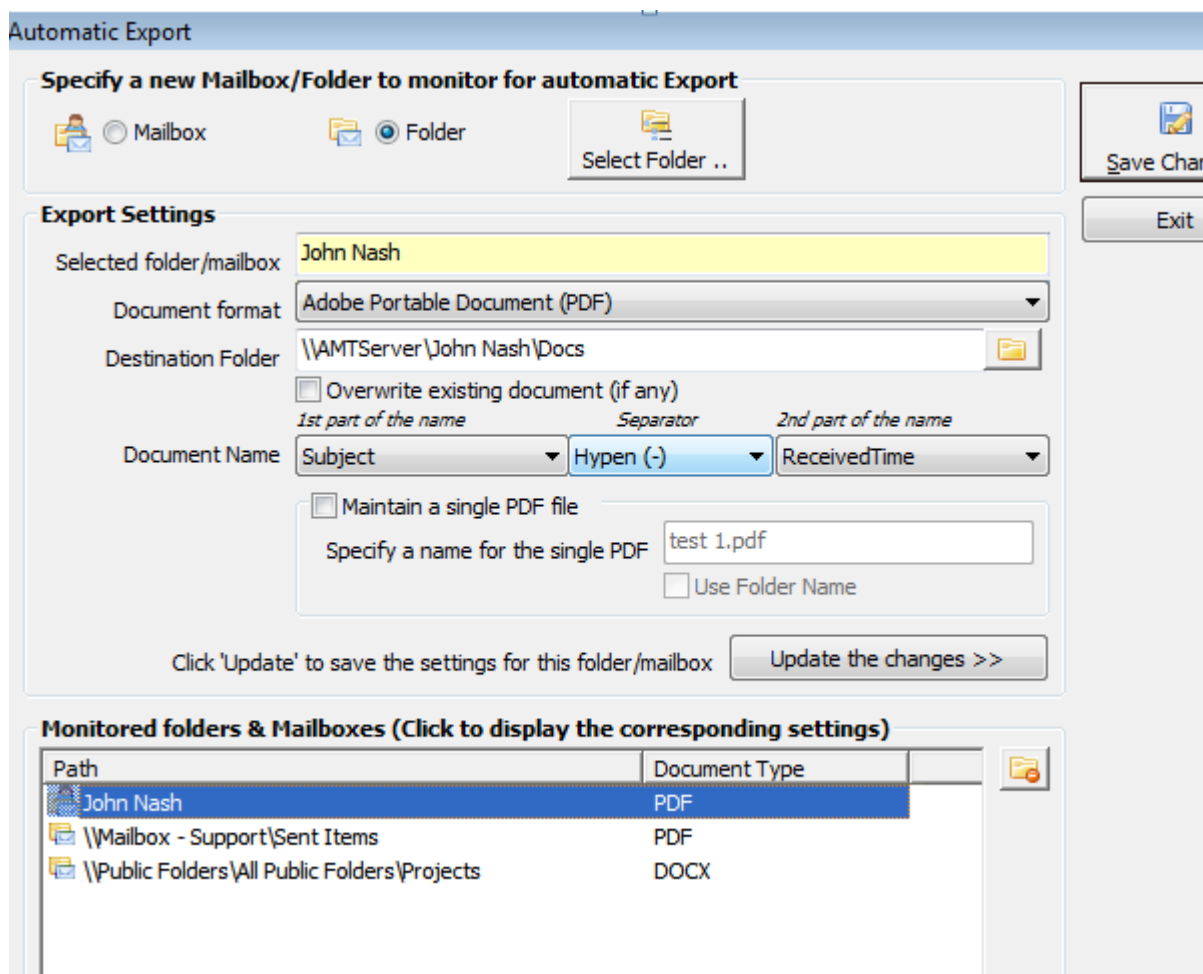
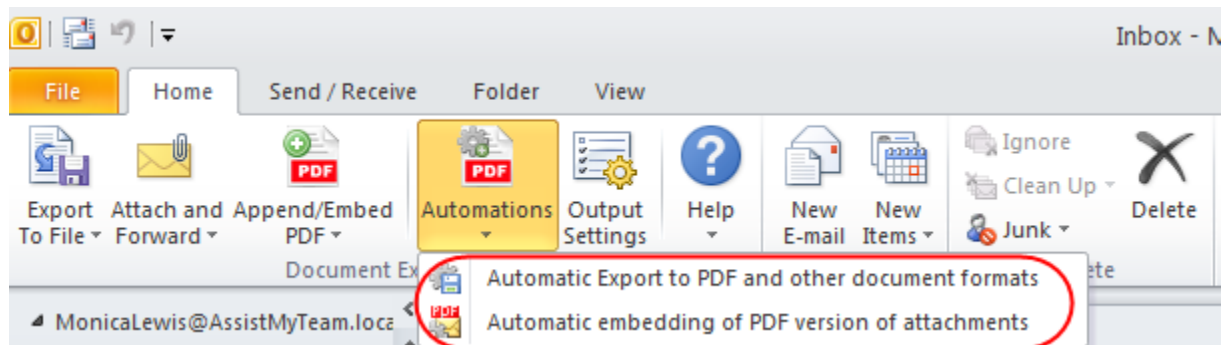
9. Automatic embedding of PDF attachments back to the Outlook items

Embedding of PDF version of the attachments to incoming emails can be automated without requiring your action, from under Document Exporter toolbar/ribbon > 'Automations' drop down > 'Automatic Embedding of PDF version of the attachments'.



10. Real-time monitoring of Outlook folders and automatic document generation

The real-time monitoring of any number of Outlook folders or Exchange mailboxes is one of the major features introduced in Document Exporter version 4. This will automatically process incoming mails or newly added appointments and tasks items thereby generating PDF or other documents based on a predefined format, without any intervention from the user. This automatic conversion of Outlook items into PDF or XPS or other documents can help you maintain a parallel copy or backup of your current Outlook items very easily.

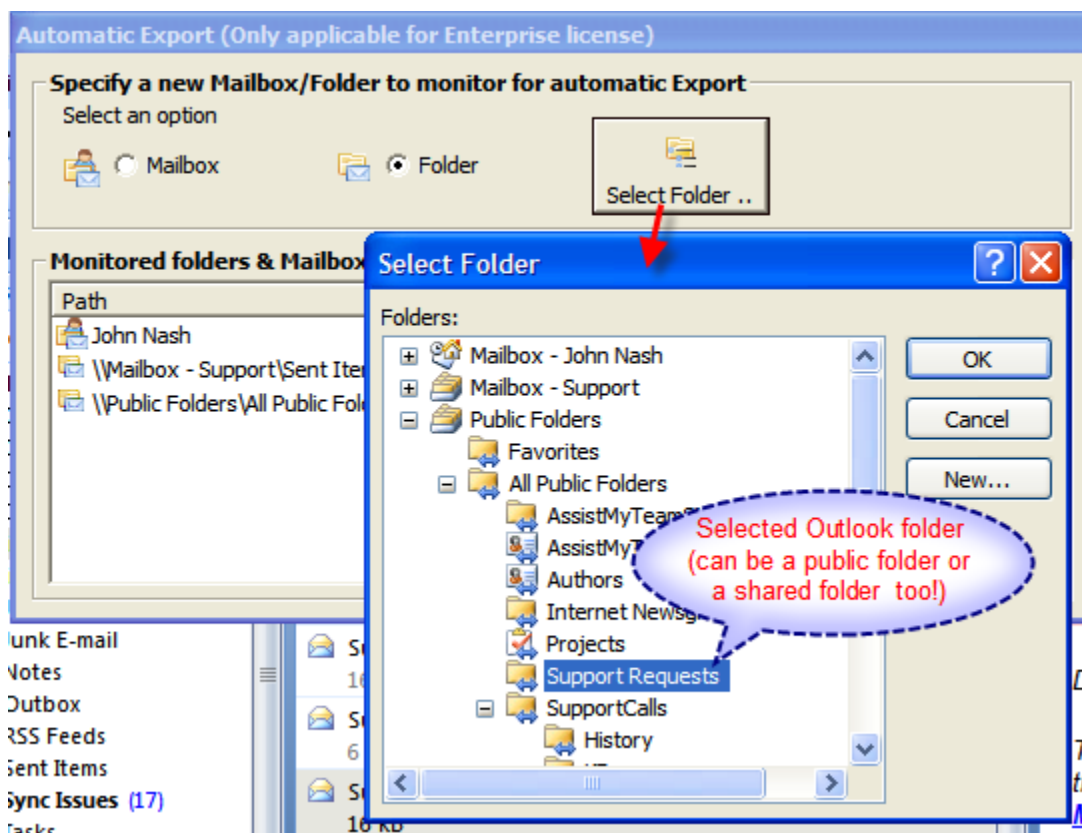


How does it work?

Automatic export works by allowing Document Exporter to monitor user specified Outlook folders or Exchange mailboxes, such that, when new emails is received or new appointments, or tasks are added, Document Exporter automatically processes those items in real time and generate document files as per the user pre-settings for that particular Outlook folder or mailbox.

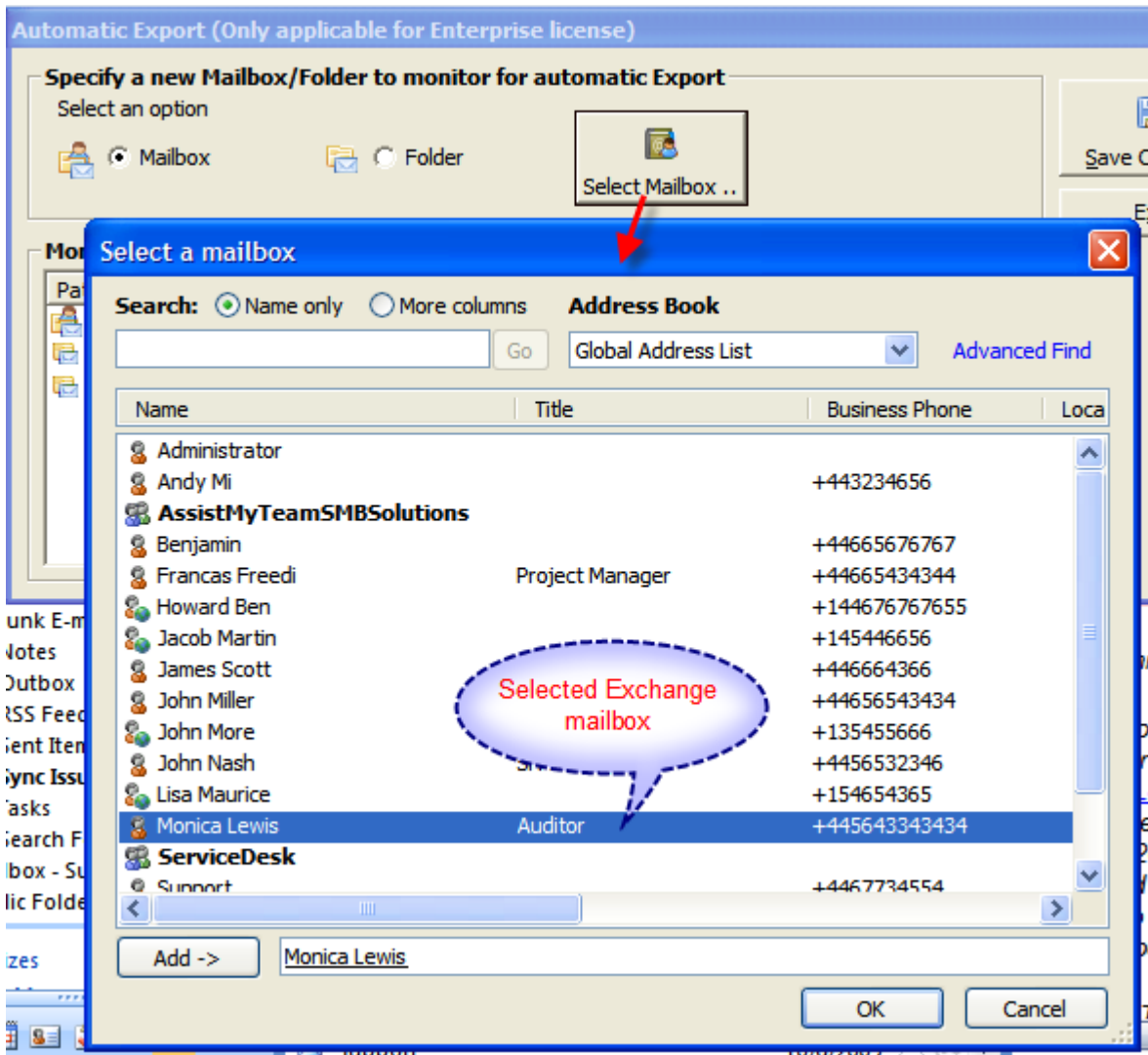
(Please note, this automatic export feature is available only in Enterprise license. If you are evaluating (e.g. 30 days trial period), this feature is available. However, if you have purchased a single user license, this feature will be disabled and will no longer work. It can be unlocked only with an enterprise license)

To add a new Outlook folder, for automatic export



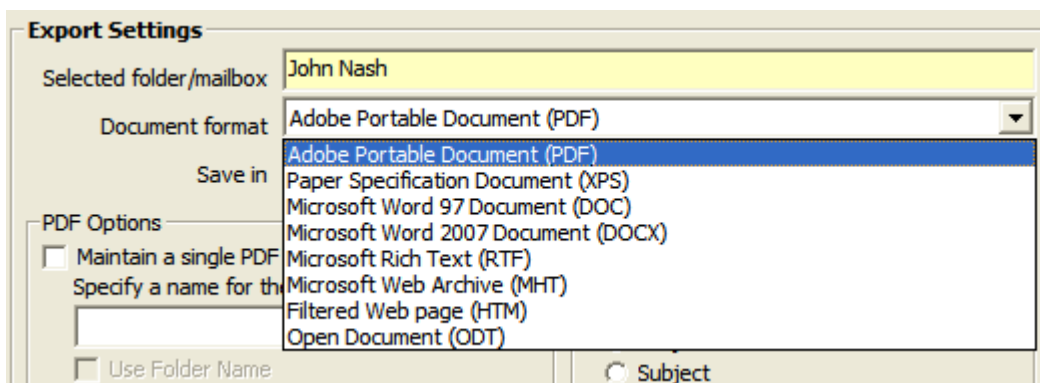
When you press the 'Select Folder...' button, you will be prompted to choose an Outlook folder which you want Document Exporter to monitor for automatic export. You can select a mail/post items folder (📁), or an appointment folder (📅), or a task folder (📌). This folder can be a public folder as well as a shared mailbox folder.

To add a new Exchange mailbox, for automatic export



To add a new Exchange mailbox for automatic export, you will be prompted to choose a particular user (or mailbox name) from the global address list. Make sure that you have access permission to the chosen mailbox, otherwise, Document Exporter won't be able to process incoming emails on that mailbox and no document files would be generated.

Choose a document format for the automatic export

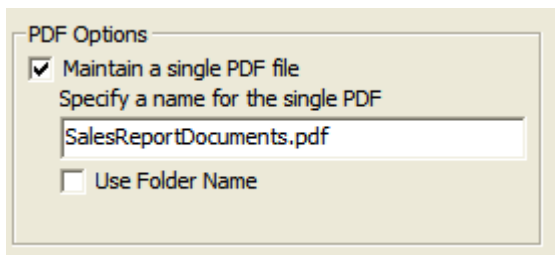


After you had selected a new Outlook folder or a mailbox, you will be presented with the Export settings, where you can specify which document format to use for the automatic

export. Supported formats are PDF, XPS, DOC, DOCX, RTF, MHT, HTM and ODT. By default, PDF is selected.

11. How to maintain a single PDF file for the automatic export for a folder/mailbox?

With the PDF option, you can opt to output a separate PDF file for each Outlook item received or added (just like for other format such as DOC, XPS), or you can opt to maintain a single PDF file, on which, every new Outlook item received or added will be appending over this single PDF file, just like an e-book.

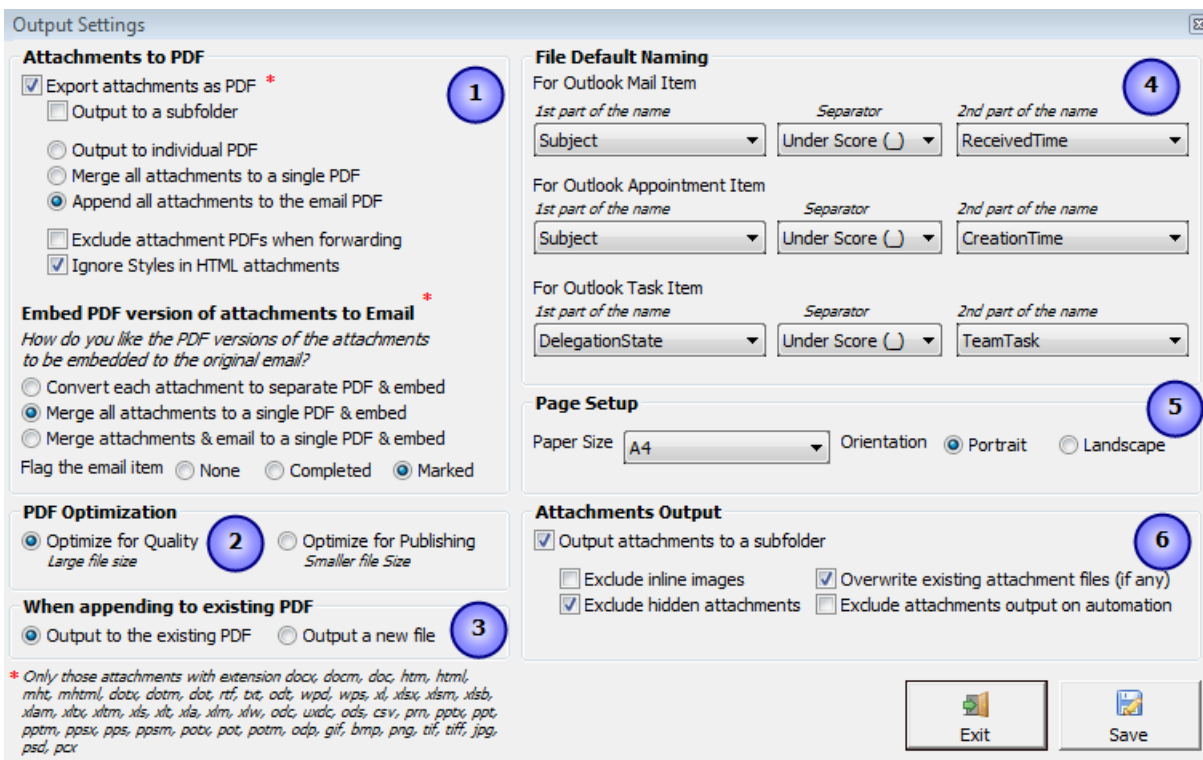
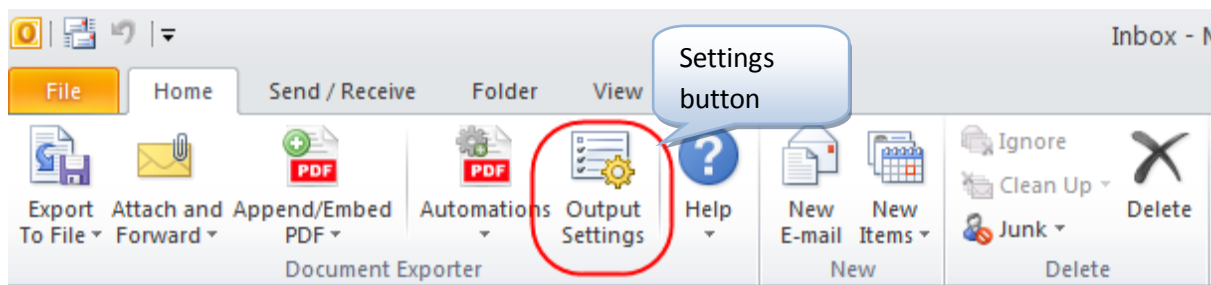


The entire appending of new Outlook items to this particular PDF file is seamless to the user, and if you have checked the option for saving attachments to subfolder in Settings, all the attachment files from the appended items will be outputted to the PDF_Attachments subfolder. (Eg. *SalesReportDocuments_Attachments*)

12. Settings - Control over the Output

You have complete control over the PDF/XPS document generation. You can customize the default file naming scheme by choosing your own metadata fields, specify the attachments output behaviour, choose single or multiple PDF merge options and modify the page setup and layout and the like. With version 3, you can also define the orientation - *landscape* or *portrait*, as well as choose between the following paper sizes for the generated documents:

Letter, Tabloid, Ledger, Legal, Executive, A3, A4, 11 x 17, 10 x 14



There are six portions in the Settings Panel:

1) Convert Attachments to PDF

Support for converting attachments to PDF files is a new feature added in version 5 release. The conversion of attachments to PDF files works for all scenarios i.e., **single** or **multiple** mails export, merging multiple mails, forwarding single or merged emails etc.

The PDF output can be controlled in three ways:

- ☒ **Output to individual PDF** - Each attachment can be converted into individual PDF file. The PDF files will be placed under a subfolder (eg. 'documentName_Attachments_PDF' assuming the PDF document of the email was saved as 'documentName.pdf').
- ☒ **Merge all attachments to a single PDF** - All attachments can be merged to a single PDF. This single PDF file will be placed under a subfolder (eg. 'documentName_Attachments_PDF' assuming the PDF document of the email was saved as 'documentName.pdf'. The single PDF file that has all the merged attachments will have a name like 'Documents_mergedAttachments.pdf').

When multiple mails or appointments are merged and exported, all the attachments of each of the mail or appointment item would be converted and saved to the same subfolder (eg. 'MergedDocumentName_Attachments_PDF' assuming the document was saved as 'MergeDocumentName.pdf').

- ☒ **Append all attachments to the email PDF** - All attachments can be appended to the PDF document of the mail item. This result PDF file will contain the email and all the attachment files as well.

If multiple mails or appointments are selected for a single merged PDF document, all the attachments of each of the mail or appointment item would also be merged to the PDF document.

Only attachments having the following extensions are supported for converting to PDF format.

docx, docm, doc, dot, dotx, dot, htm, html, mht, mhtml, rtf, txt, odt, wpd, wps, xl, xlsx, xlsm, xlsb, xlam, xltx, xltm, xls, xlt, xla, xlm, xlw, odc, uxdc, ods, csv, prn, pptx, ppt, pptm, ppsx, pps, ppsm, potx, pot, potm, odp, bmp, gif, png, tif, tiff, jpg, jpeg, pcx, psd

If the attachment is a PDF file, then it is directly outputted or merged along with the other attachment formats.

Additionally, you can exclude PDF attachments from being included when a PDF email is forwarded.

2) PDF optimization

Here, you can specify the optimization for published PDF files. If you use the first option '*Optimize for Quality*', the output file will be larger, but will be in high quality. This is useful for printing purposes. On the other hand, the second option '*Optimize for Publishing*' gives you a minimum size of the PDF file, by compromising in the quality a bit. This is ideal for sharing over the internet, email etc.

3) Append PDF options

You can now append selected Outlook items to an existing PDF file. You can choose if to output the final document file (containing the appended pages) as a new PDF file, or to overwrite the existing (original) PDF file.

4) Default file naming scheme based on metadata information

You can customize the default naming scheme of the generated documents for different type of Outlook items such as mails, appointments or tasks separately. There are two drop downs from which you can choose two metadata fields, and these two portions would be concatenated by the chosen symbol of the separator drop down. The availability of the fields would depend on the Outlook item type. For example, for appointment, you will have fields specific to that Outlook type, such as Start time, End time, Organizer etc.

5) Page Setup

You can define the orientation - *landscape* or *portrait*, as well as choose between the following paper size for the generated documents:

- Letter
- Tabloid
- Ledger
- Legal
- Executive
- A3
- A4
- 11 x 17
- 10 x 14

6) Output Attachments in original state to a subfolder

Export Attachments to a subfolder when saving a mail, appointment or task item to a document format. If you enable this option, and when you save an email to a document, it would also export all the available attachments of the item, to a subfolder (eg. 'documentName_Attachments' assuming the document was saved as 'documentName.pdf'). You can also optionally exclude inline image and hidden attachments from exporting.

If multiple mails or appointments are merged and exported as a single document, then, all the attachments of each of the mail or appointment item would be saved to the same subfolder (eg. 'MergedDocumentName_Attachments' assuming the document was saved as 'MergeDocumentName.pdf').

13. Licensing Options

This product is available for a free 30 days trial, with no limitation in the functionality. During the trial period, it is important that you evaluate all the features so that at end of the trial, you can make a decision of whether the product meet your requirements or not.

If you decide to purchase a license, it is important that you understand the licensing options available, because based on the type of Outlook folder the functionality of this product is available or limited.

For Single User license

- ✔ Intended for *personal use* only
- ✔ Allows use of the product in one *primary system*, and additionally, on a secondary system such as *personal laptop*
- ✔ Full functionality available for use in your *primary Exchange mailbox* and other *POP/IMAP* and *local PSTs* only. When you try to use this product on public folders or shared mailboxes, the functionality is limited, and you might be prompted with a warning message on the need for an Enterprise license.
Note: On 30 days trial, this limitation is not applicable.
- ✔ Free upgrade for a year.

For Enterprise license

- ✔ Avail certain features locked in the single user license
- ✔ No limitation to the usage scenario - use the product on any number of *shared mailboxes* or *public folders* (apart from the *primary mailbox, IMAP/POP or local PST folders*)
- ✔ 3 licensing slabs available – *for 50 users, for 500 users and unlimited users*. The price varies for each slab. Refer to the purchase page of this product to know more.
- ✔ *Priority support and bug fixes*. Support queries are answered within 24 hours
- ✔ Included is a year of [AssistMyTeam Support and Maintenance Contract](#)
- ✔ *MSI installer* for enterprise wide deployment available upon request

14. Important Links

- [Document Exporter - Home page](#)
Go to the website of Document Exporter.
- [Video Tutorials](#)
Quickly learn how to use Document Exporter addin in Outlook and generate PDF/XPS/DOC/MHT documents from your emails!
- [What is Adobe Portable Document Format \(PDF\)?](#)
Know more about Adobe and PDF.
- [XML Paper Specification: Overview.](#)
Explore the features and functionality that the XML Paper Specification makes possible.
- [Save a Word Document as a PDF Effortlessly.](#)
With Microsoft Office Word 2007, documents can be easily saved as a Portable Document Format or PDF document without the need for third-party software.
- [2007 Microsoft Office Add-in: Microsoft Save as PDF or XPS](#)
Download 2007 Microsoft Office Add-in to save document as PDF or XPS
- [About single file Web pages \(MHTML\)](#)
Know more about single file Web pages (MHTML)
- [Contact us](#)
Ask us any question