

V11

# Email to PDF

*For Outlook*

Export emails & attachments to PDF





**Welcome to Email to PDF 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 and attachments, either manually or automatically. The add-in is an elaborate help documentation that will guide how to work with Email to PDF for Outlook.

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

Contents

1. Introduction to Email to PDF..... 4

2. Features ..... 5

3. Ribbons/Toolbars in Outlook ..... 6

4. Converting an email and attachments (or any Outlook items) to PDF ..... 7

5. Converting multiple emails in batch to a PDF or other document formats..... 10

6. Generating a merged single PDF file from multiple emails ..... 12

7. Appending selected Outlook items to an existing PDF file ..... 13

8. Converting attachments to PDF ..... 14

9. Embed PDF version of the attachments back to the Outlook item ..... 16

10. Automatic embedding of PDF attachments back to the Outlook items ..... 18

11. Real-time monitoring of folders and automatic PDF generation ..... 19

12. How to maintain a single PDF file for the automatic export for a folder/mailbox? ..... 22

13. Add watermark (logo or brand) to your PDF output ..... 23

14. Add PDF security options – password and permissions ..... 26

15. Settings - Control over the Output ..... 29

16. Licensing Options ..... 41

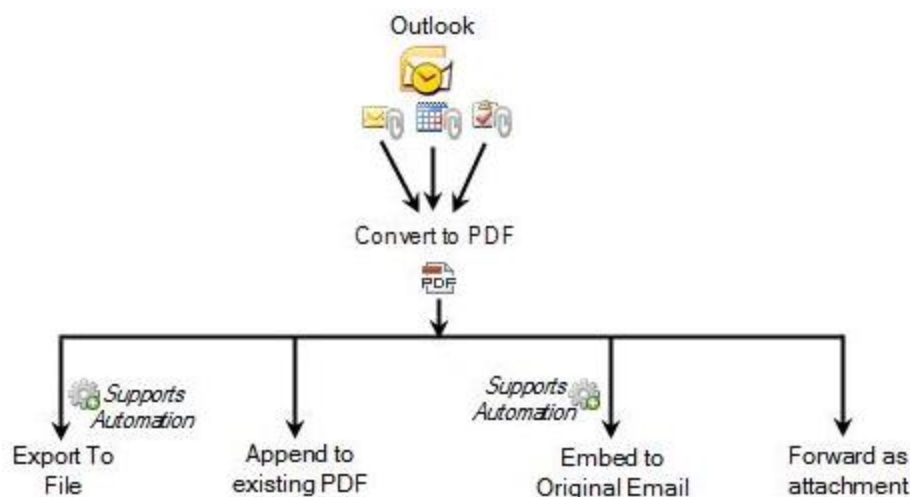
17. Important Links ..... 42

# 1. Introduction to Email to PDF

**Email to PDF** add-in 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, Email to PDF add-in preserves all the inline or embedded images, hyperlinks and even attachments in the generated PDF documents.

Furthermore, when emails and attachments are merged to generate a single PDF file, the add-in adds bookmarks, page number and custom footer in the PDF structure tree for easy navigation to the individual email and attachment in the PDF. With security features such as ability to add watermark, user password and set permissions to PDF output, Email to PDF add-in is ideal for users who are looking for powerful, yet easy and affordable PDF creation in Microsoft Outlook.

Adding to the productivity, you can even automate the add-in 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. 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 which will eat your precious time.

Email to PDF add-in is designed to bridge this gap by bringing the PDF support in Microsoft Outlook thereby leveraging your existing investment in Microsoft Office suite.

## How does it work?

Internally, the add-in 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

You can automatically set the add-in 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

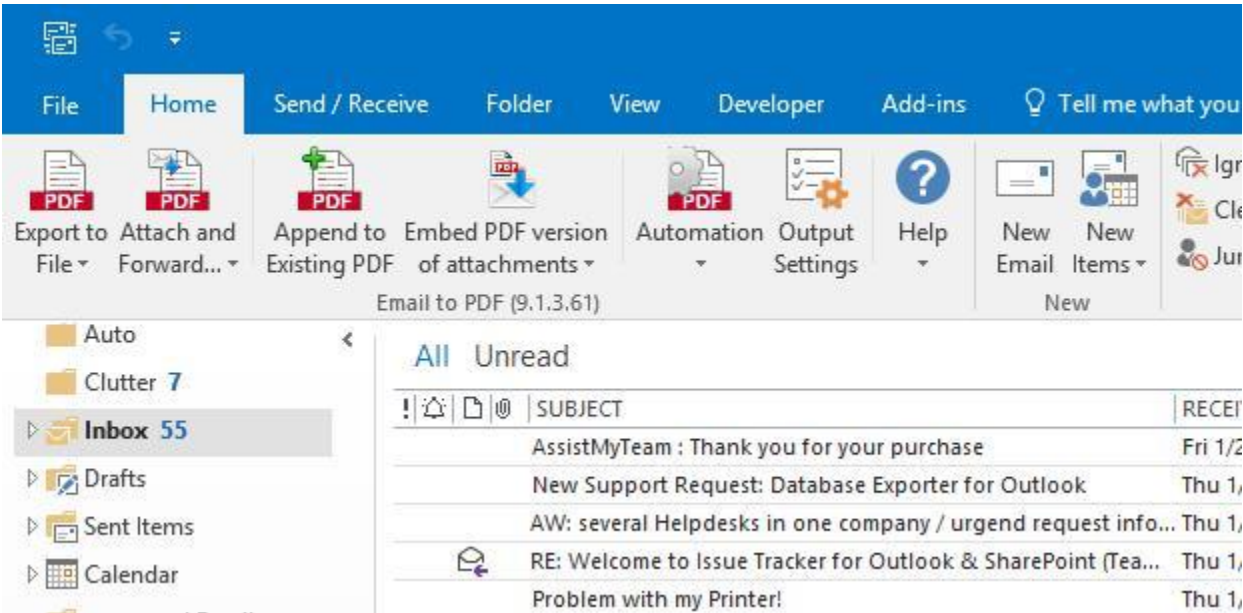
Email to PDF add-in can output attachment files to PDF files. It can generate each attachment to individual PDF, merge all attachments to a single PDF and can also append all the attachments to the PDF file of the email.

## 2. Features

- **Seamless integration** with Microsoft Outlook\*
- Supports export to the following document formats:
  - **Adobe Portable** document (.pdf)
  - **XML Paper Specification** document (.xps)
  - Microsoft **Word** document (.doc)
  - **Web-archive** single page (.mht)
  - Filtered webpage (.htm)
  - Microsoft **Word 2007, 2010, 2013, 2016, 2019** document (.docx)
  - **Rich Text** Format (.rtf)
  - **OpenDocument** Text (.odt)
- Apply **watermark** image or text to PDF (*i.e., company name*)<sup>NEW</sup>
- **Secure PDF** documents by setting a user password for viewing<sup>NEW</sup>
- Set **security restrictions** to PDF documents such as ability to edit or print<sup>NEW</sup>
- Works with **mail, appointment** and **task** items
- Preserves **inline images** and **hyperlinks** in the PDF.
- Images with HTTP URLs are automatically saved locally and the links updated to make them available in the generated PDF documents.
- Process multiple emails, appointments or tasks in **batch mode** and export to **multiple PDF documents**.
- Use a generic incremental name or the subject of the email, appointment or task to name the output PDF files generated in batch mode.
- Merge multiple emails, appointments or tasks into a single PDF.
- **Append** the emails and attachments to an **existing PDF file**
- **Automatically export** incoming emails to PDF. Additionally, choose a '**one PDF**' file option to append incoming emails and their attachments to maintain a single searchable PDF document for a mailbox.
- **Dynamic naming scheme** for generated documents, by using metadata information from the email (*e.g., Subject, Received Time, Sender....*)
- Automatically **embed PDF version of the attachments** back to the original Outlook email for easy viewing in iPad, iPhone and other tablet devices
- Supports conversion of attachments of [120 or more different formats](#) to PDF.
- Works with Outlook 2007, 2013, 2016, 2019 (32-bit and 64-bit)
- Supports the following languages - *English, Chinese (Traditional), Danish, Dutch, Finnish, French, German, Greek, Italian, Japanese, Korean, Malay, Portuguese, Spanish, Swedish, Turkish*

### 3. Ribbons/Toolbars in Outlook

Once installed, Email to PDF add-in appears as a ribbon in Outlook 2016 / 2019.

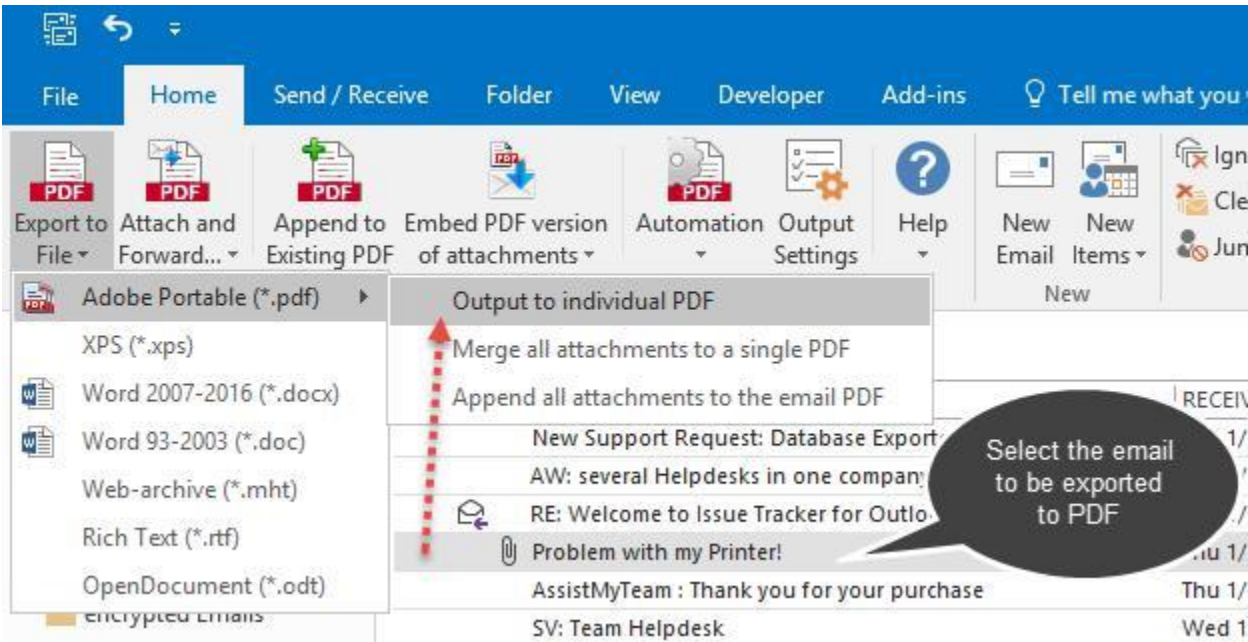


The add-in supports the following two mode of operation: single and batch processing. The output document format available in the **Forward As** and **Export As** menus depend on the number of selected items in the current Outlook folder.

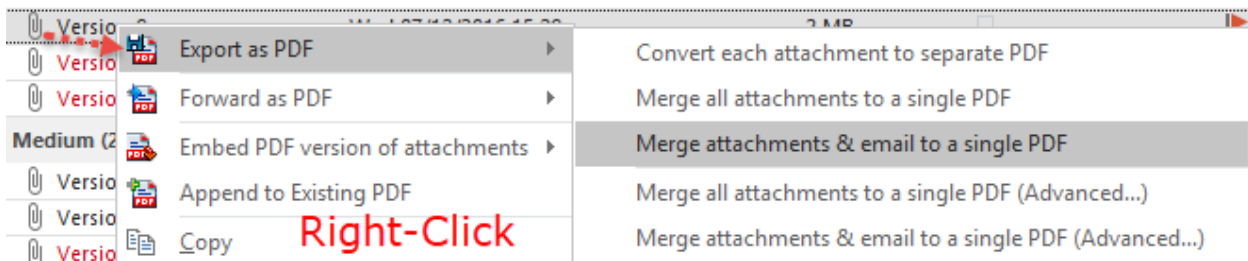
Email to PDF add-in also supports adding and appending the selected Outlook items to an existing PDF file. (**Add to existing PDF...**). In addition, it also supports automating the document generation from incoming emails or new items from an Outlook folder. For more, refer to the section **'Automation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

4. Converting an email and attachments (or any Outlook items) to PDF

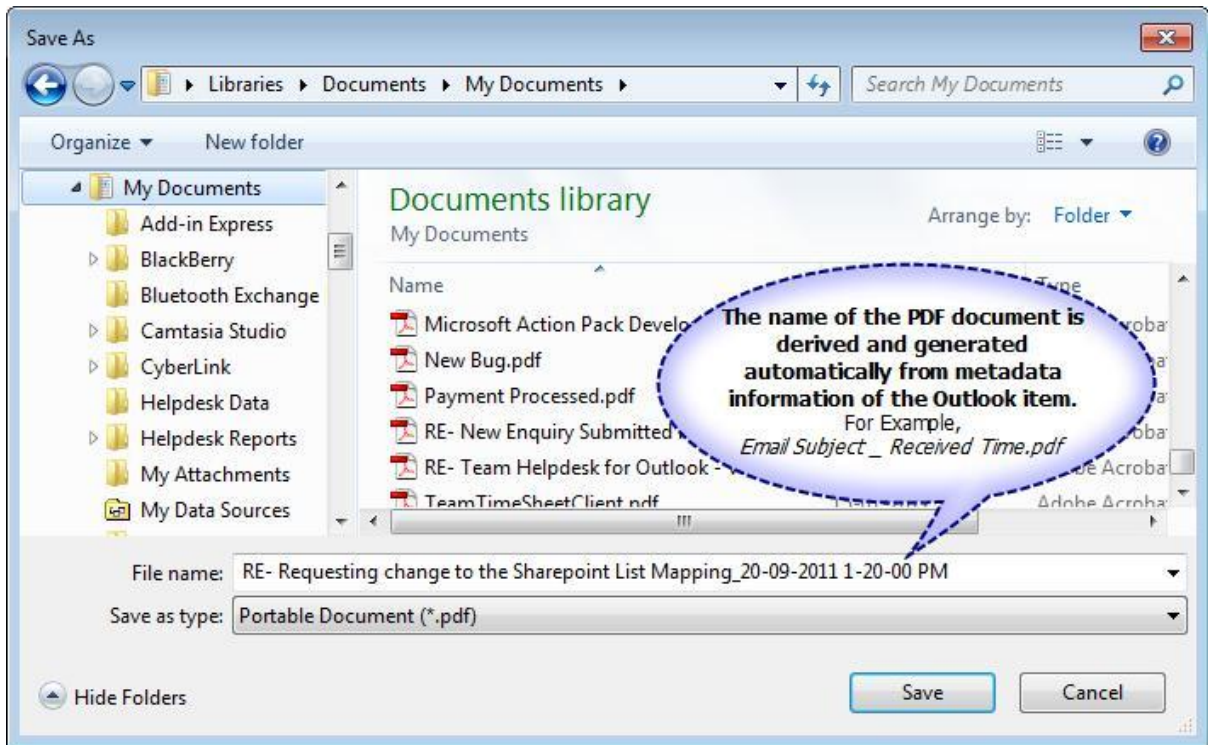
**Export As:** This allows you to convert email and its attachments to PDF or to another supported format to your local folder.



In Outlook 2016, these menu items are available under the context menu (i.e., pop-up menu you get when you right-click the selected items).



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.

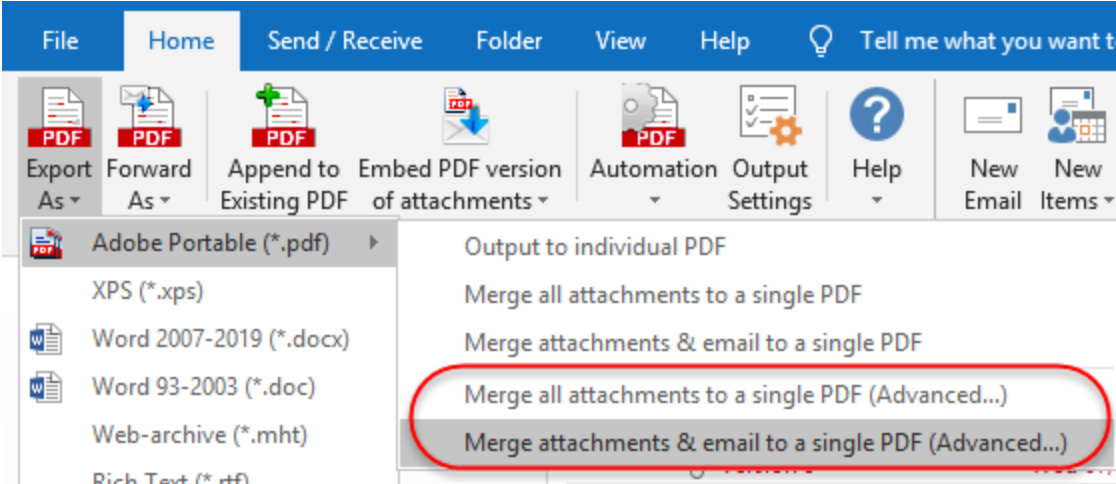




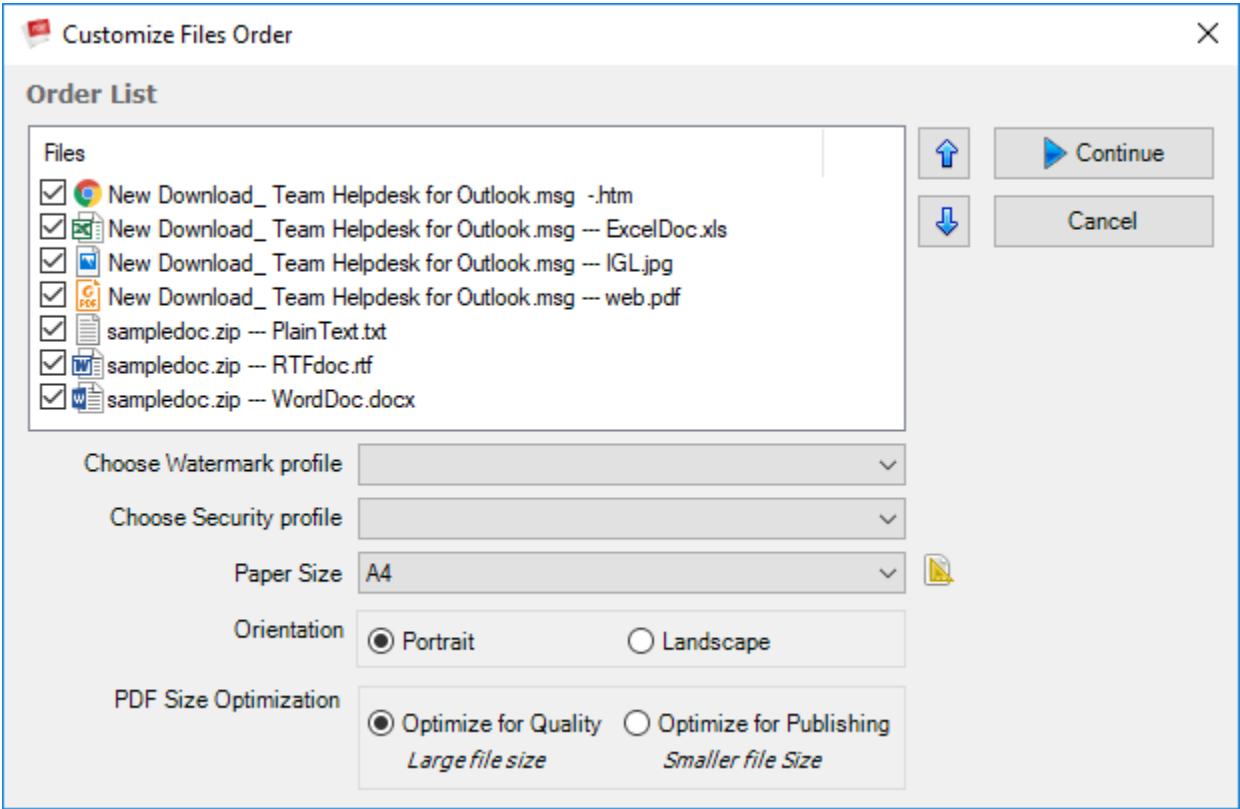
you can customize the naming convention of the generated PDF document (i.e., using metadata information of email or the Outlook item) from *Outlook > Email to PDF toolbar/ribbon > Settings*. You can customize the default naming scheme for different type of Outlook items such as mails, appointments or tasks separately.



When you generate a single merged PDF document (with email and attachments), the add-in will use the default windows file sorting algorithm (i.e., alphabetically) while merging your attachments to the single PDF. If you do want to alter or re-order the sequence of the attachments, you can use the advanced merging mode as shown below:

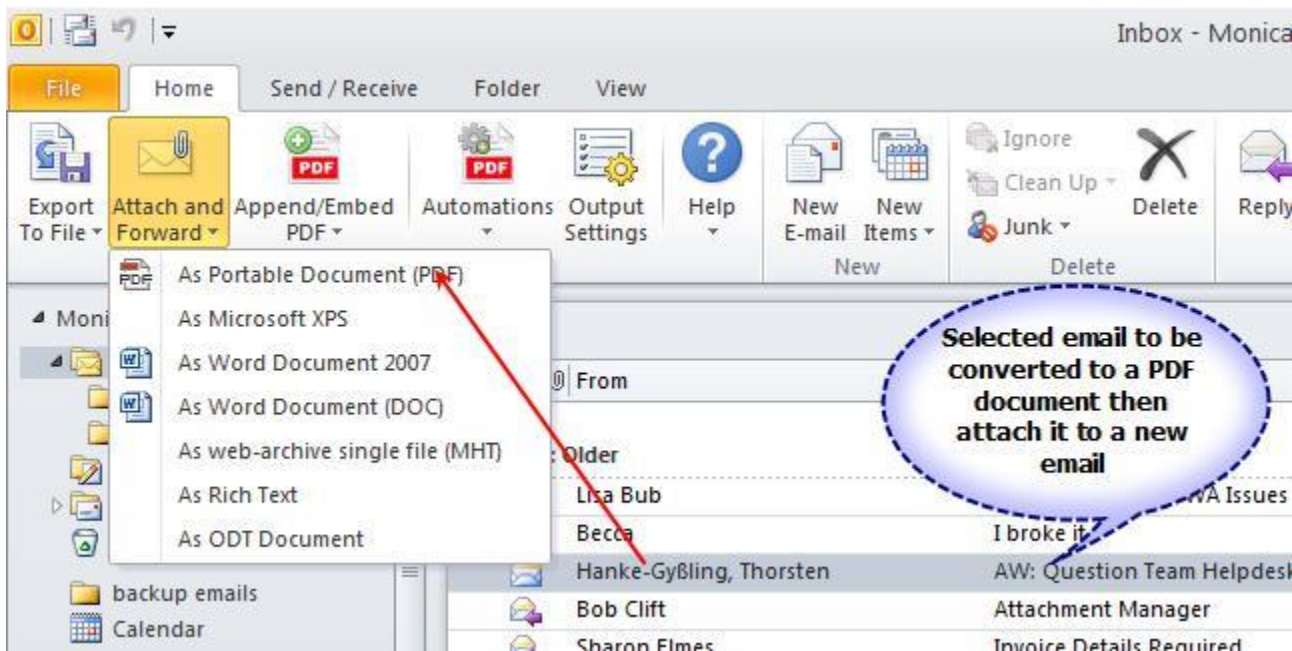


And from the customize files order window, you can change or sort the order or sequence of the files in the way you want them to appear in the merged PDF file. You can further apply your own watermark, security profiles, page setup etc.





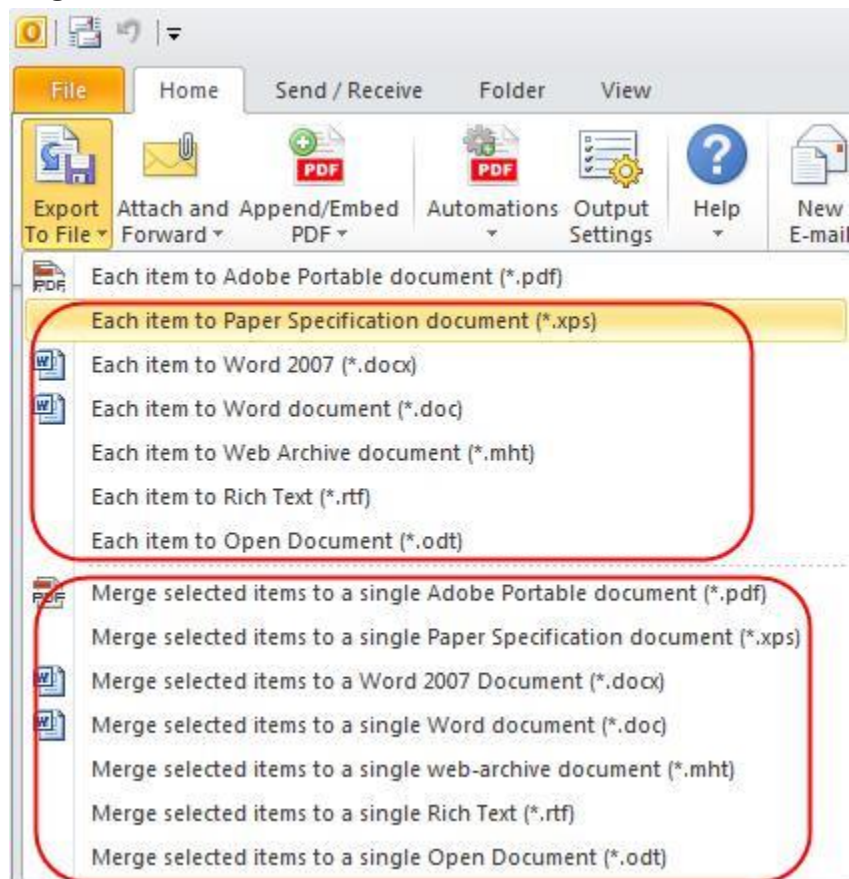
**Forward As:** You can convert an email and its attachments to PDF and attach it to a new empty email to forward it to a recipient.



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

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

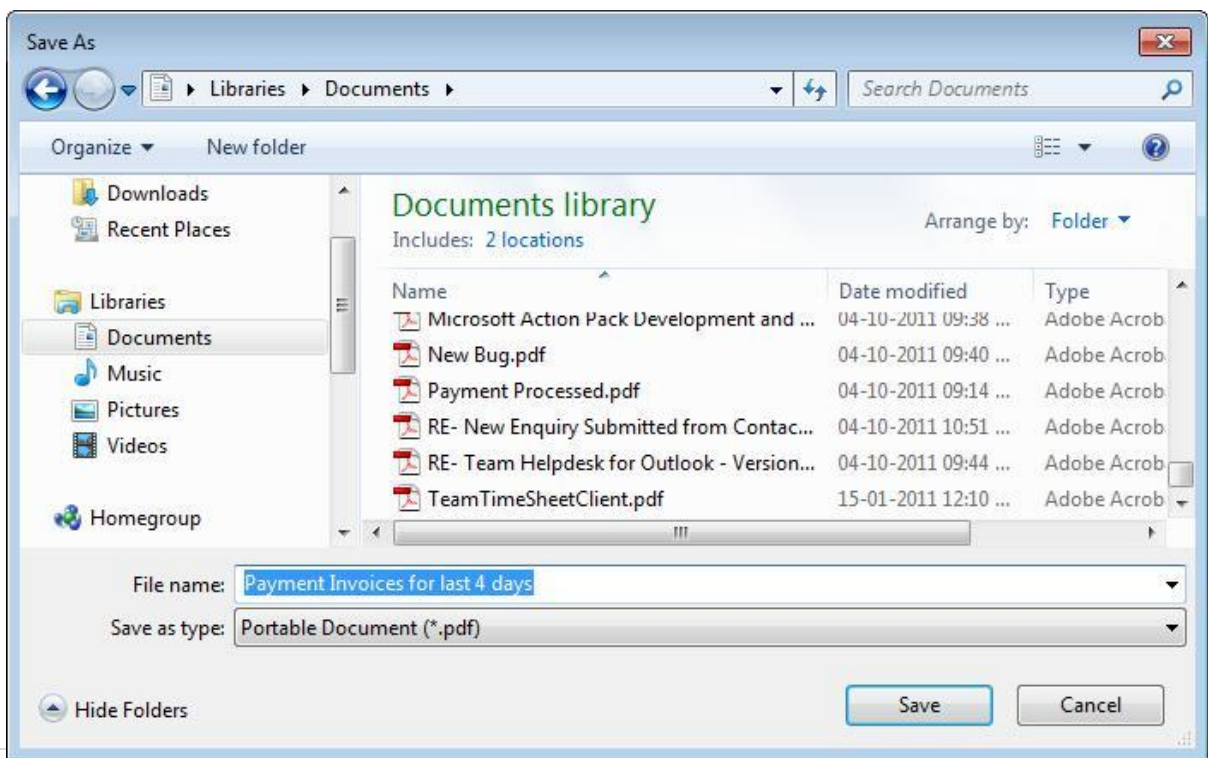
**Export As:** When you select multiple emails, the 'Export As' drop-down button will appear like given below screenshot:



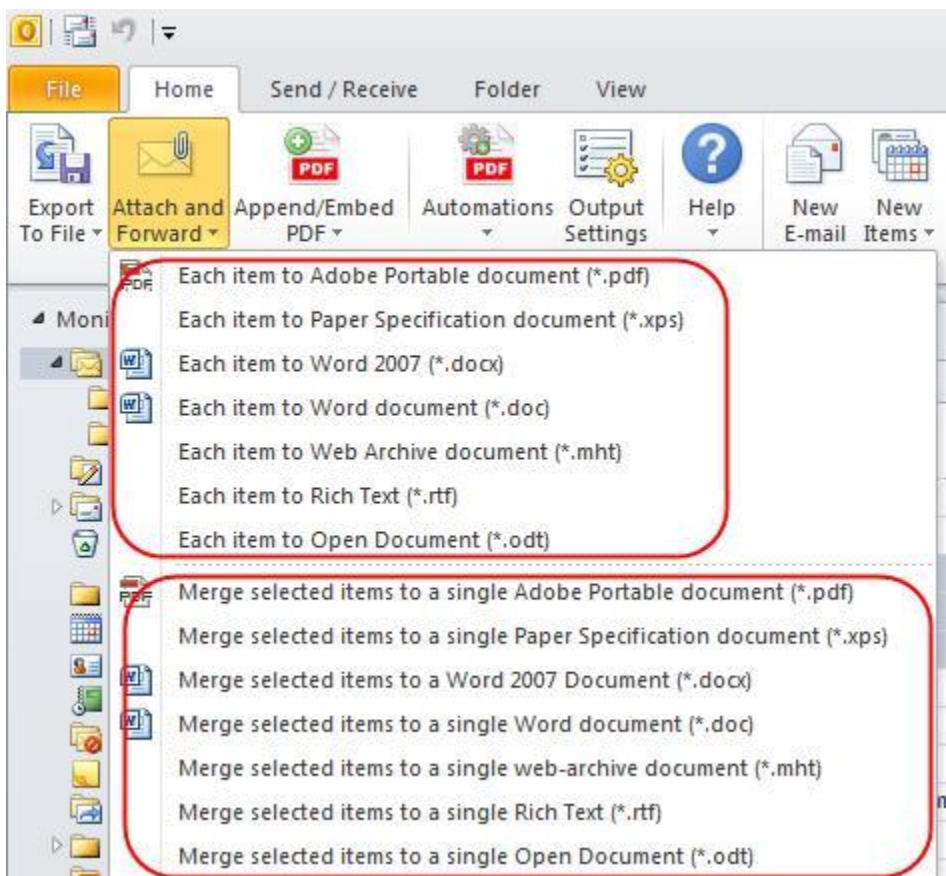
1. Converting each selected email to a corresponding document format in batch.

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:



**Forward As:** Similarly, when you select multiple emails or any Outlook items, the drop-down options under the ‘Forward As’ will change reflecting the several ways of batch processing the emails or the other items.

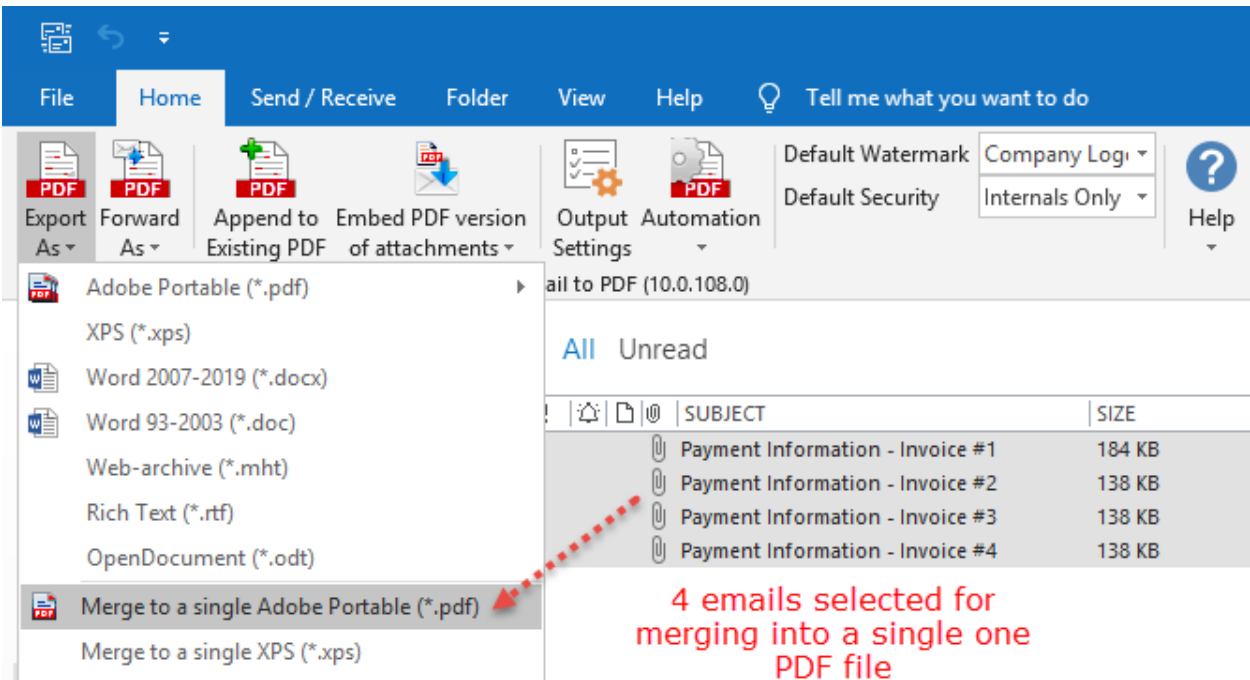


1. Generating individual PDF or document format from each of the selected email or Outlook item in batch is one of the striking options.
2. Merging all selected emails into one, and then converting it to a single PDF or document format is another option.

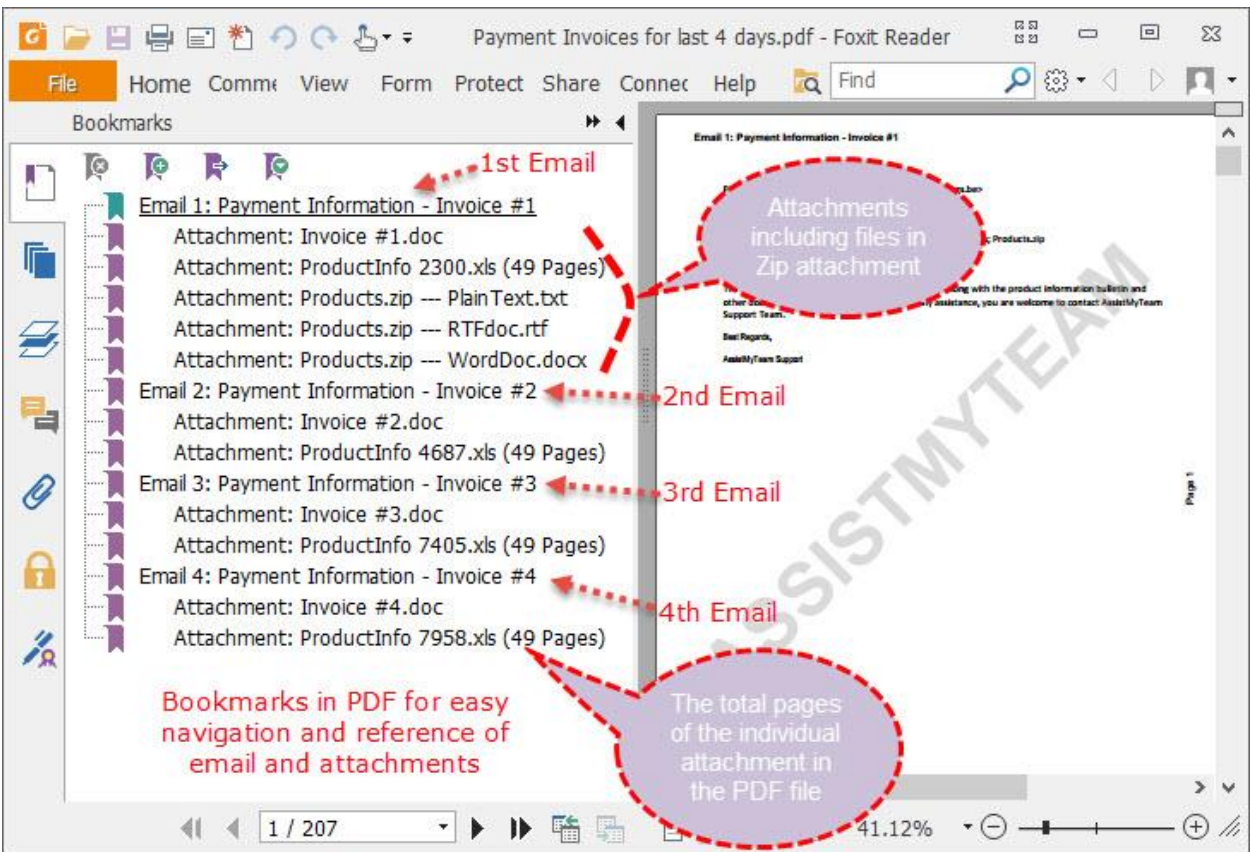


## 6. Generating a merged single PDF file from multiple emails

When you select multiple emails, the drop-down options under the 'Export As' menu will change to reflect the varied way of batch converting the emails to document formats. One of these options is to generate a single PDF file from multiple emails and their attachments.

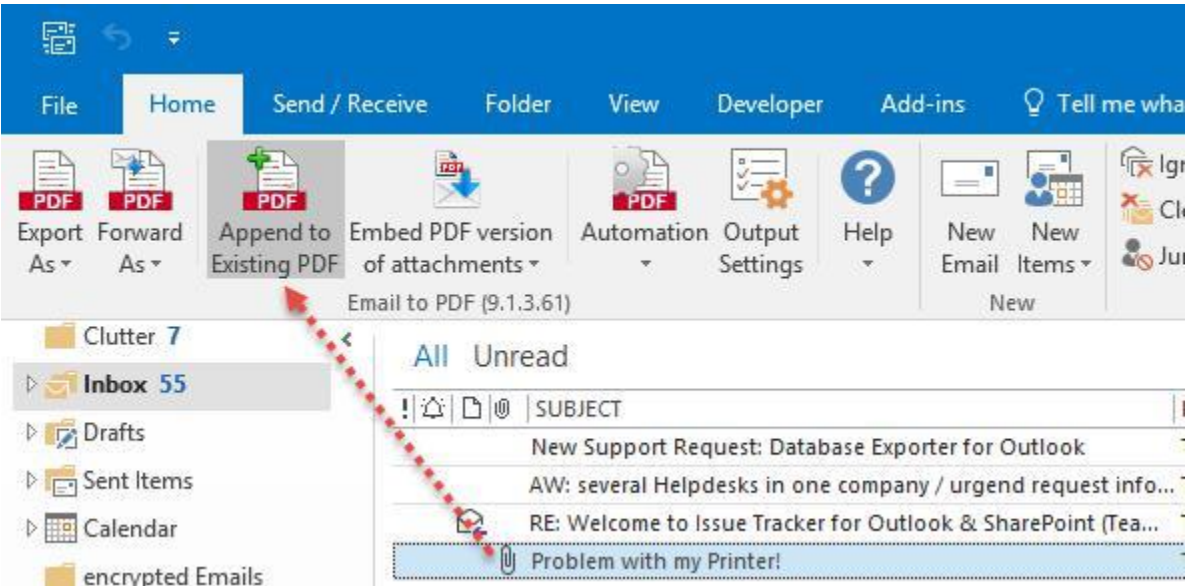


Once you specify a filename and the folder location to save the merged PDF document, you will notice that the add-in automatically adds bookmarks, page number and even custom footer information such as your company name in the PDF structure tree for easy navigation to the individual email and attachment in the PDF.



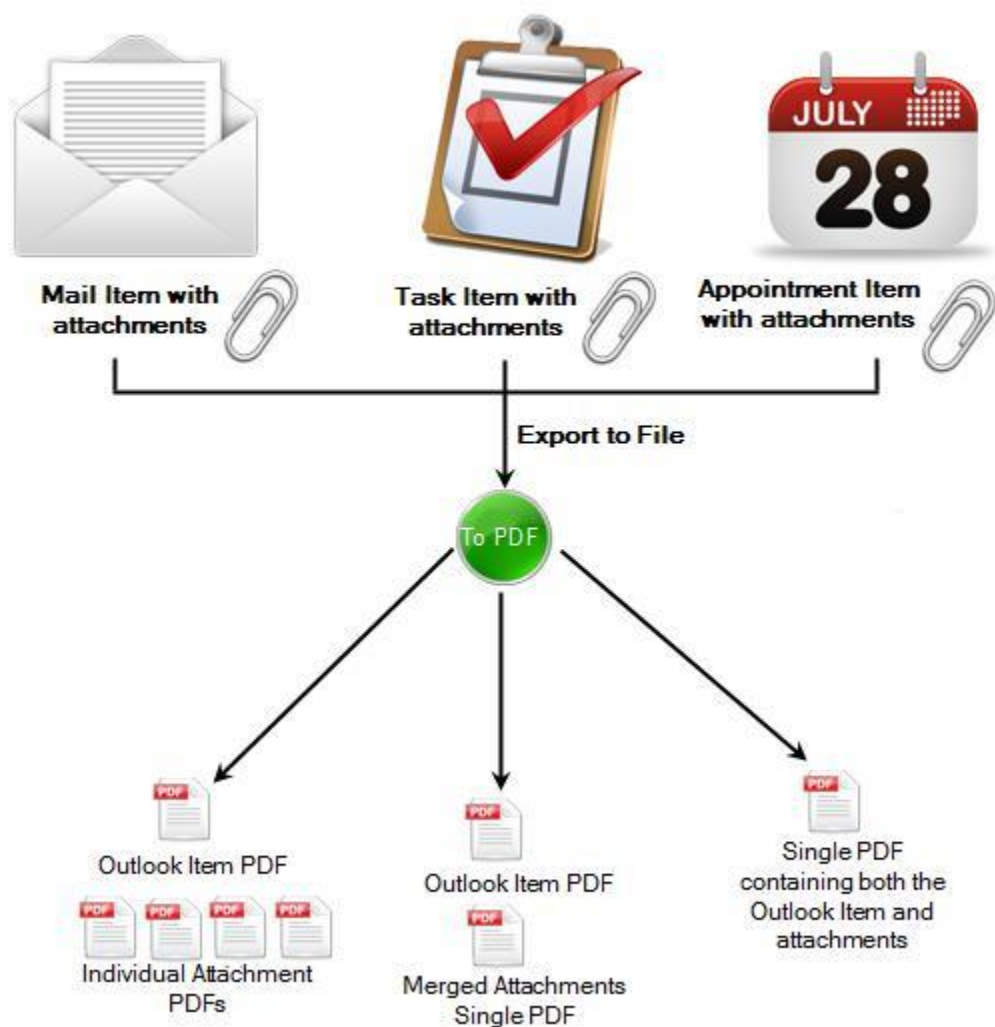
## 7. Appending selected Outlook items to an existing PDF file

Email to PDF add-in supports adding email and its attachments to an existing PDF file. The selected emails and attachments will be converted to PDF format and would be appended at the end of the existing PDF file.

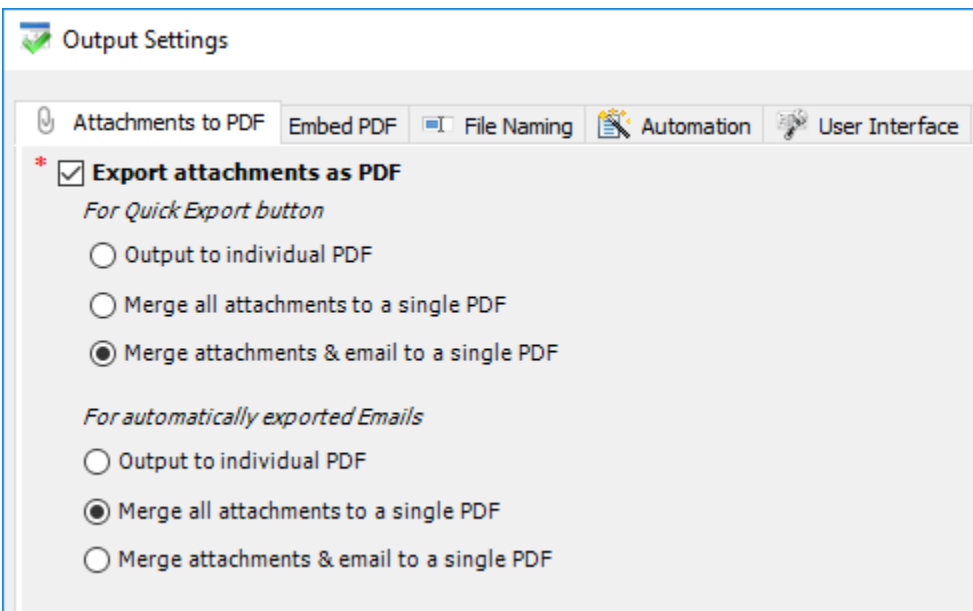


## 8. Converting attachments to PDF

No matter what types of attachments, even composite ones such as archived ZIP or Outlook MSG or EML files, are in your email or any other Outlook items, with Email to PDF add-in, you can convert these attachments to PDF format on the fly and output it to file, or re-attach back to the email (to have a PDF version of the attachments). You can go further by choosing to output to separate PDF for each attachment or, merge them all in single PDF file.



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, Email to PDF add-in would automatically convert to PDF.





Attachment formats that are supported for conversion to PDF files:

- Microsoft Word** Files (.docx, .docm, .doc, .dot, .dotx, .dot, .dotm)  
**Microsoft Excel** files (.xl, .xlsx, .xlsm, .xlsb, .xlam, .xltx, .xltm, .xls, .xlt, .xla, .xlm, .xlw, .uxdc,)  
**Microsoft PowerPoint** Presentation files (.pptx, .ppt, .pptm, .ppsx, .pps, .ppsm, .potx, .pot, .potm)  
**Single File Web Page** (.mht; .mhtml)  
**Web Page** (.htm; .html)  
**Rich Text Format** (.rtf)  
**Plain Text** (.txt, .prn, .csv, .log, .ini, .config)  
**Programming files** (.c, .h, .cs, .vb)  
**XML Document** (.xml)  
**OpenDocument Formats** (.odt, .odp, .odc, .ods)  
**Works 6.0 – 9.0** (.wps)  
**Multi-page TIFF** (.tif)  
<sup>1</sup>**Compressed Zip** (.zip)  
<sup>2</sup>**MSG Email file** (.msg)  
<sup>3</sup>**EML Email file** (.eml)  
<sup>4</sup>**Camera RAW files** (.raw, .nef, .nrw, .cr2, .crw, .pef, .arw, .srw, .sr2, .orf, .mrw, .mdc, .dcr, .kdc, .mos, .erf, .raf, .3fr, .dng, .mef, .rw2, .x3f, .srf, .ari, .bay, .cri, .cap, .iiq, .eip, .dcs, .drf, .k25, .fff, .ptx, .pxn, .r3d, .rwl, .rwz, cs1, cxi, j6i)  
**Image files** (.bmp, .gif, .png, .jpg, .jpeg, .tif, .tiff, .pcx, .psd, .cut, .dds, .ico, .lbm, .pcd, .pcx, .pic, .psp, .sgi, .tga, .exr, .hdr, .iff, .jng, .ppm, .pgm, .pbm, .pfm, .ras, .wbmp, .xbm, .xpm, .mng, .koa, .j2k, .jp2, .jbig2, .wmf)

<sup>1</sup>Also supports converting files from inner ZIP file (embedded within another ZIP/MSG/EML file attachment) to PDF.  
<sup>2</sup>Also supports converting inner MSG and attachments (embedded within another ZIP/MSG/EML file attachment) to PDF.  
<sup>3</sup>Also supports converting inner EML and attachments (embedded within another ZIP/MSG/EML file attachment) to PDF.  
<sup>4</sup>RAW formats and Brand

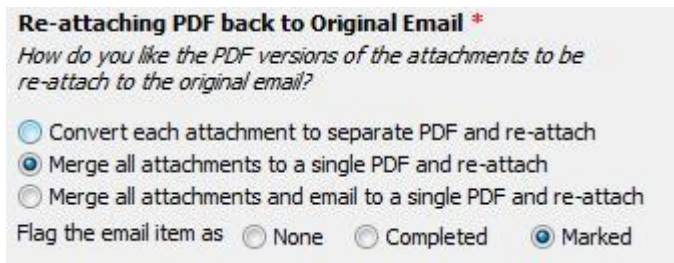
RAW Extension	Brand	RAW Extension	Brand
raw	Panasonic/Leica	ari	Arri Alexa
nef, nrw	Nikon	bay	Casio
cr2, crw	Canon	cri	Cintel
pef, ptx	Pentax	cap, iiq, eip	Phase One
arw, srf, sr2	Sony	x3f	Sigma
srw	Samsung	rw2	Panasonic
orf	Olympus	fff	Imacon/Hasselblad raw
mrw	Minolta	pxn	Logitech
mdc	Agfa, Minolta	r3d	RED Digital Cinema
dcr, dcs, drf, k25, kdc	Kodak	rwl	Leica
mos	Leaf	rwz	Rawzor
erf	Epson	mef	Mamiya
raf	Fuki	j6i	Ricoh
3fr	Hasselbald	cxi	FMAT
dng	Adobe	cs1	Sinar CaptureShop

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

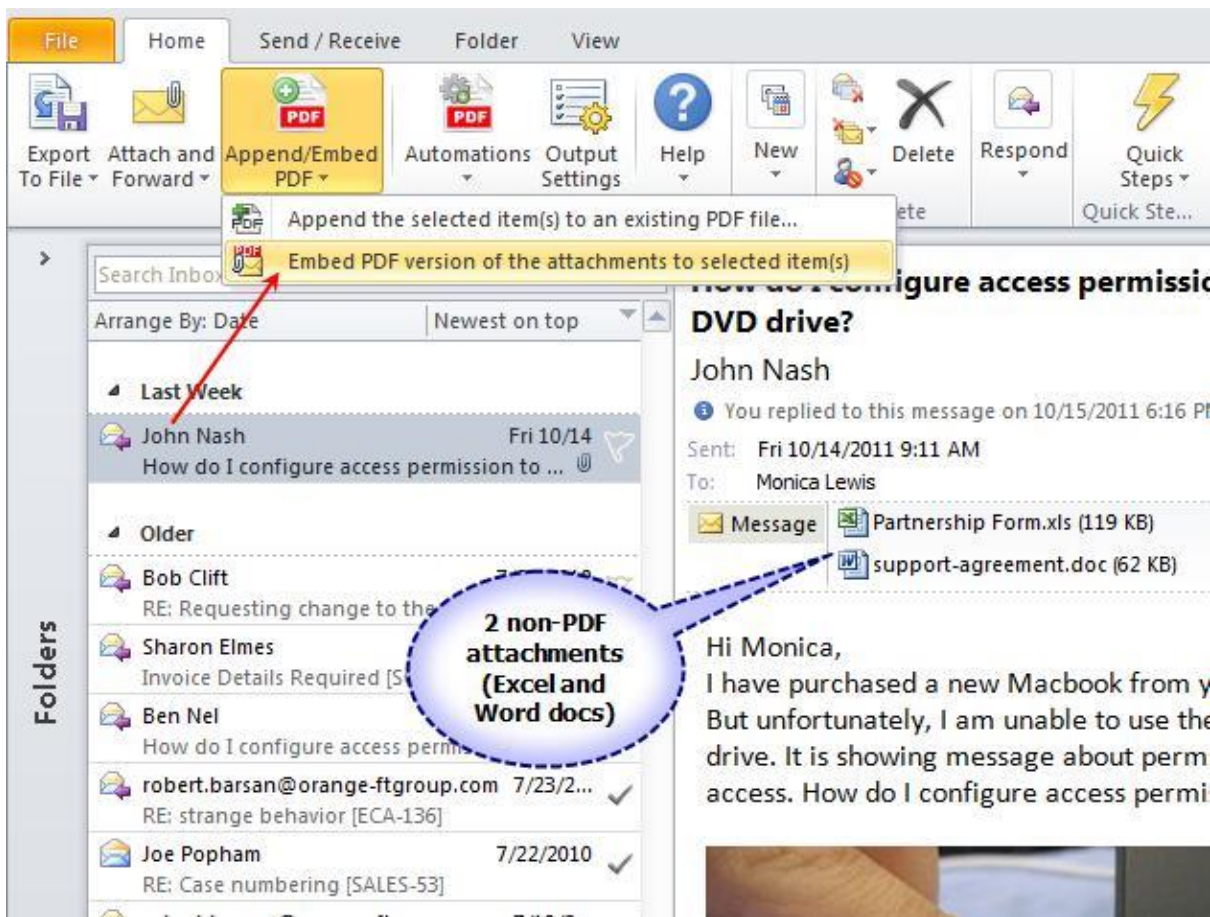
Inability to view various attachment file formats within an email is a common problem for those who own an iPad, iPhone or other tablet device. PDF format support is, however, built-in natively in most of these devices and you can easily preview the PDF attachment within the email.

Keeping this limitation in mind, Email to PDF add-in 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

Message Partnership Form.xls (119 KB)  
support-agreement.doc (62 KB)  
All Attachments(2)\_as\_of\_10202011 12-42-56 PM.pdf (217 KB)

Hi Monica,

I have purchased a new Macbook from your store. But unfortunately, I am unable to use the DVD 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

Message Partnership Form.xls (119 KB) support-agreement.doc (62 KB)  
Partnership Form\_Converted.pdf (113 KB) support-agreement\_Converted.pdf (144 KB)

Hi Monica,

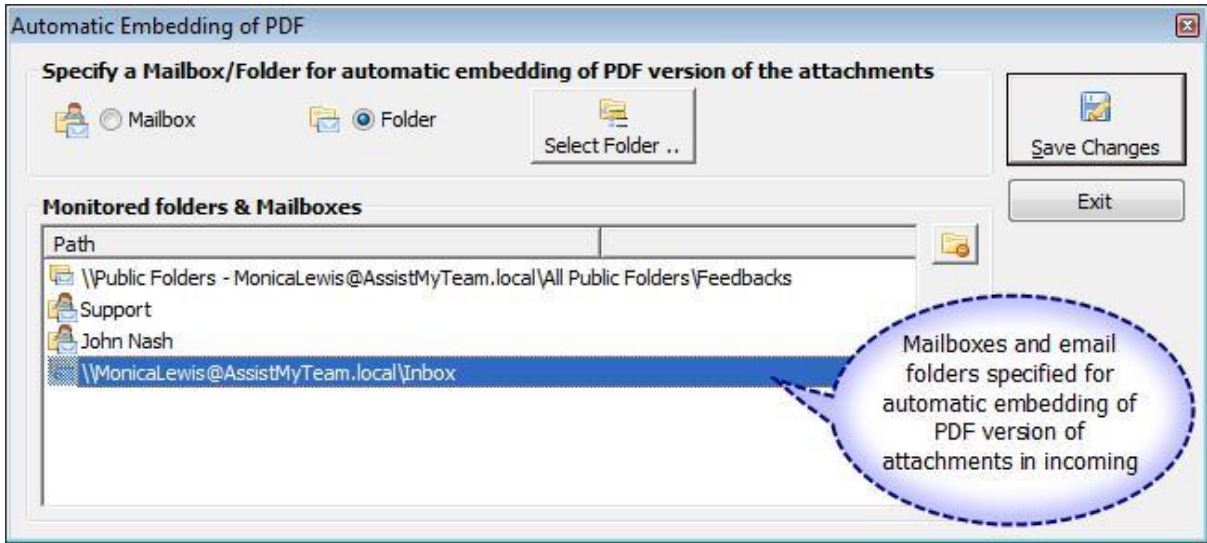
I have purchased a new Macbook from your store. But unfortunately, I am unable to use the DVD drive. It is showing message about permission for access. How do I configure access permission?



PDF version of each non-attachment embedded

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

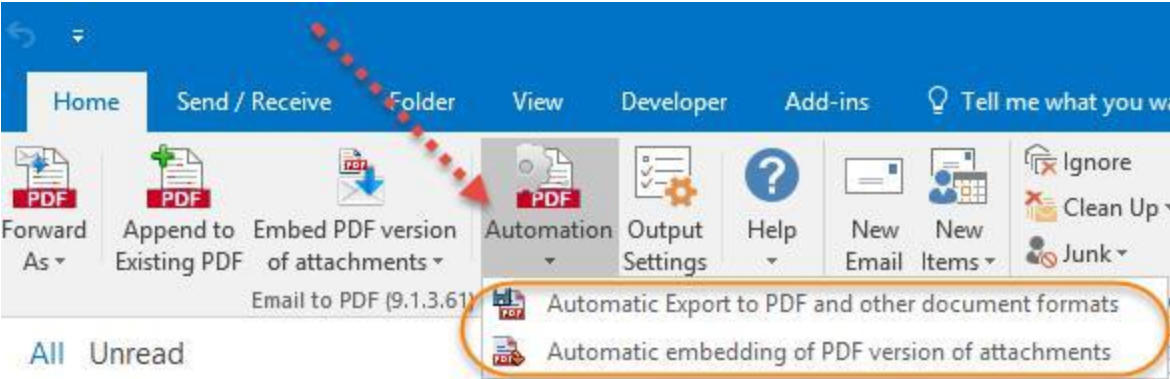
Embedding of PDF version of the attachments to incoming emails can be automated without requiring your action, from under **Email to PDF toolbar/ribbon > 'Automations' > 'Automatic Embedding of PDF version of the attachments'**.





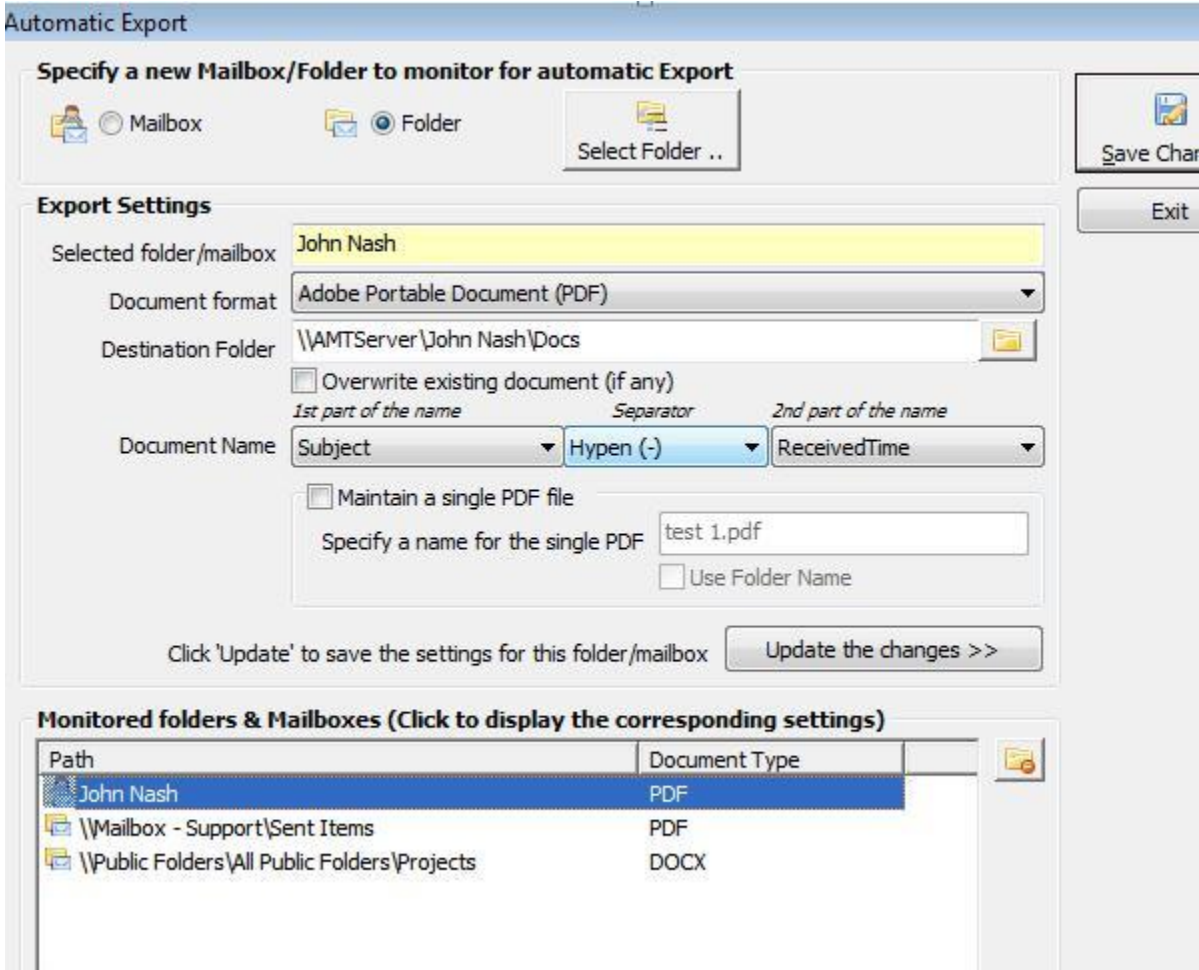
## 11. Real-time monitoring of folders and automatic PDF generation

With Email to PDF add-in, you can choose Outlook folders and mailboxes for real-time conversion of incoming emails and attachments to PDF as when the email arrives. The add-in monitors these chosen Outlook folders/mailboxes to automatically process incoming mails or newly added appointments and tasks items thereby generating PDF, without any intervention from the user. This automation helps you to maintain a parallel copy or backup of your current Outlook emails and its attachments.



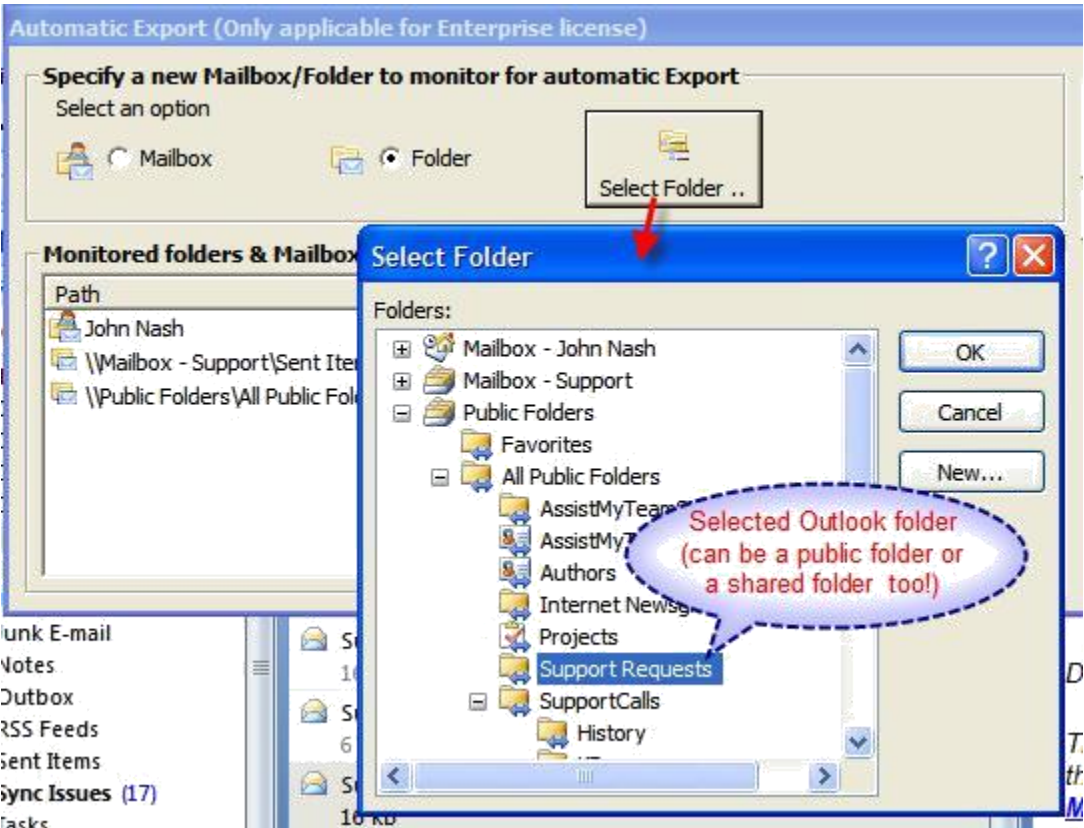
### How does it work?




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



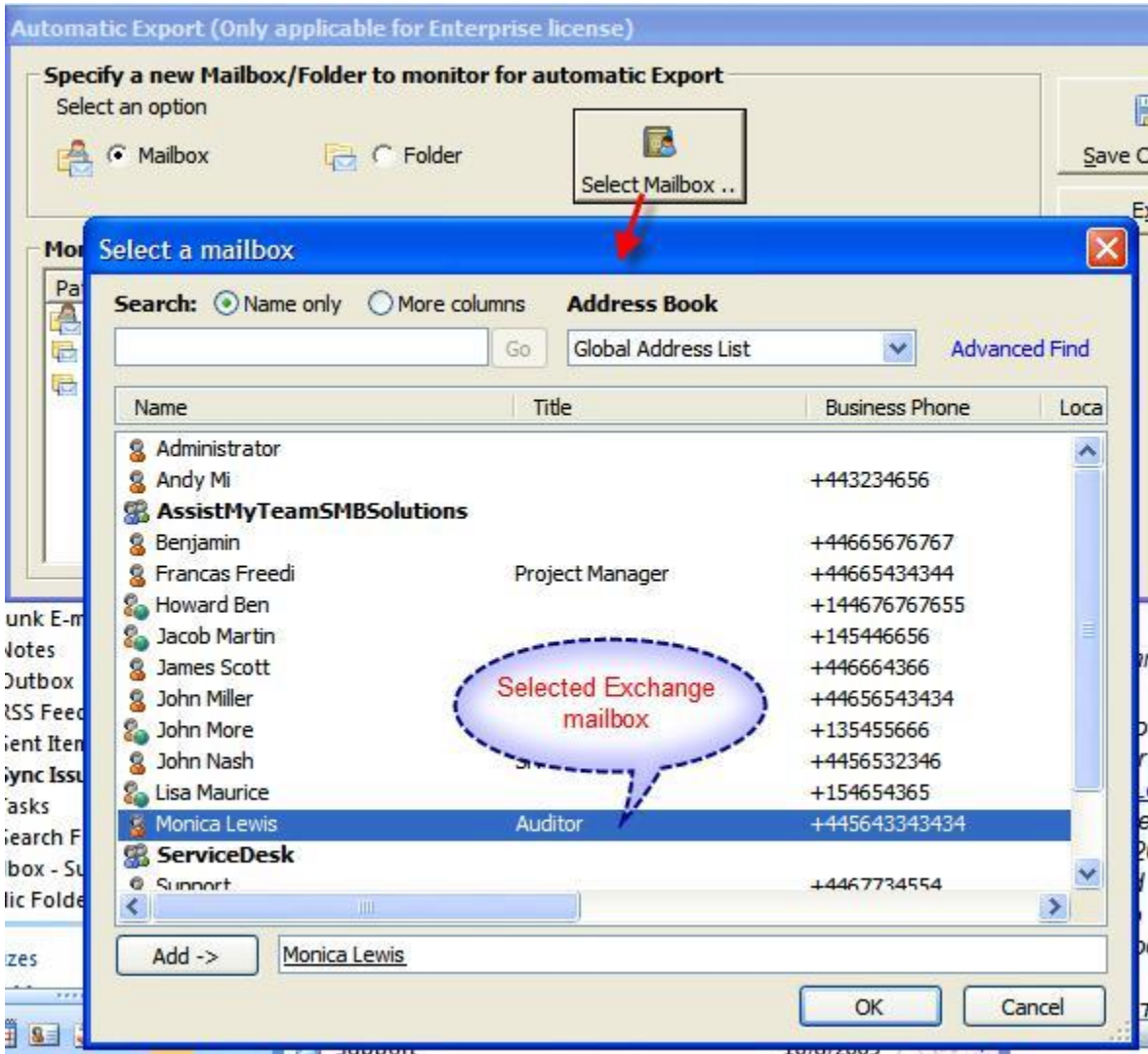
(Please note, this automatic export feature is available only in Enterprise license. If you are evaluating (e.g. 30-days trial period), this feature is available. However, if you have purchased a single user license, this feature will be disabled and will no longer work. It can be unlocked only with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

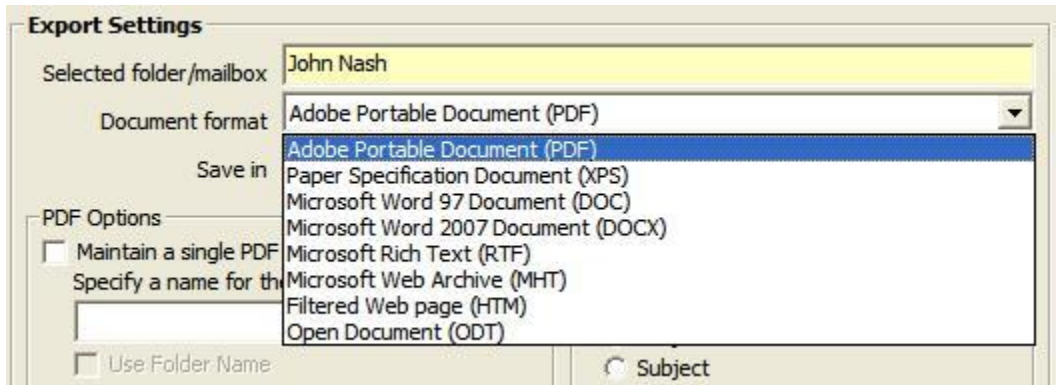


To add a new Exchange mailbox for automatic export, you will be prompted to choose a particular



user (or mailbox name) from the global address list. Make sure that you have access permission to the chosen mailbox, otherwise, the add-in won't be able to process incoming emails on that mailbox and no document files would be generated.

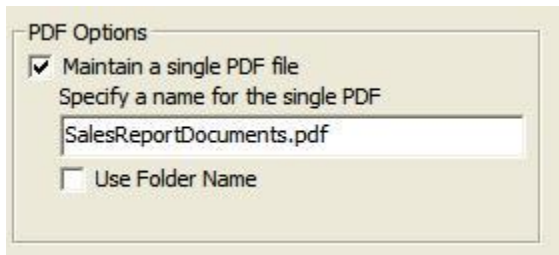
*Choose a document format for the automatic export*



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.

## 12. 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 another 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.

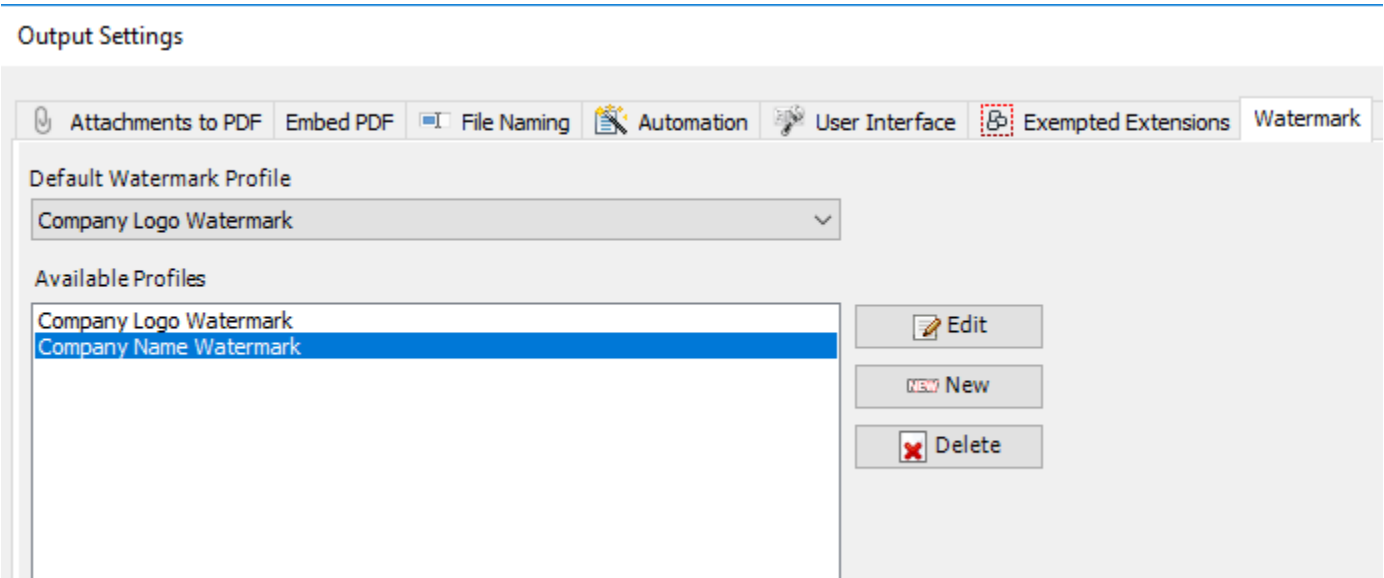


The entire appending of new Outlook items to this particular PDF file is seamless to the user, and if you have checked the option for saving attachments to subfolder in Settings, all the attachment files from the appended items will be outputted to the PDF\_Attachments subfolder. (Eg. *SalesReportDocuments\_Attachments*)

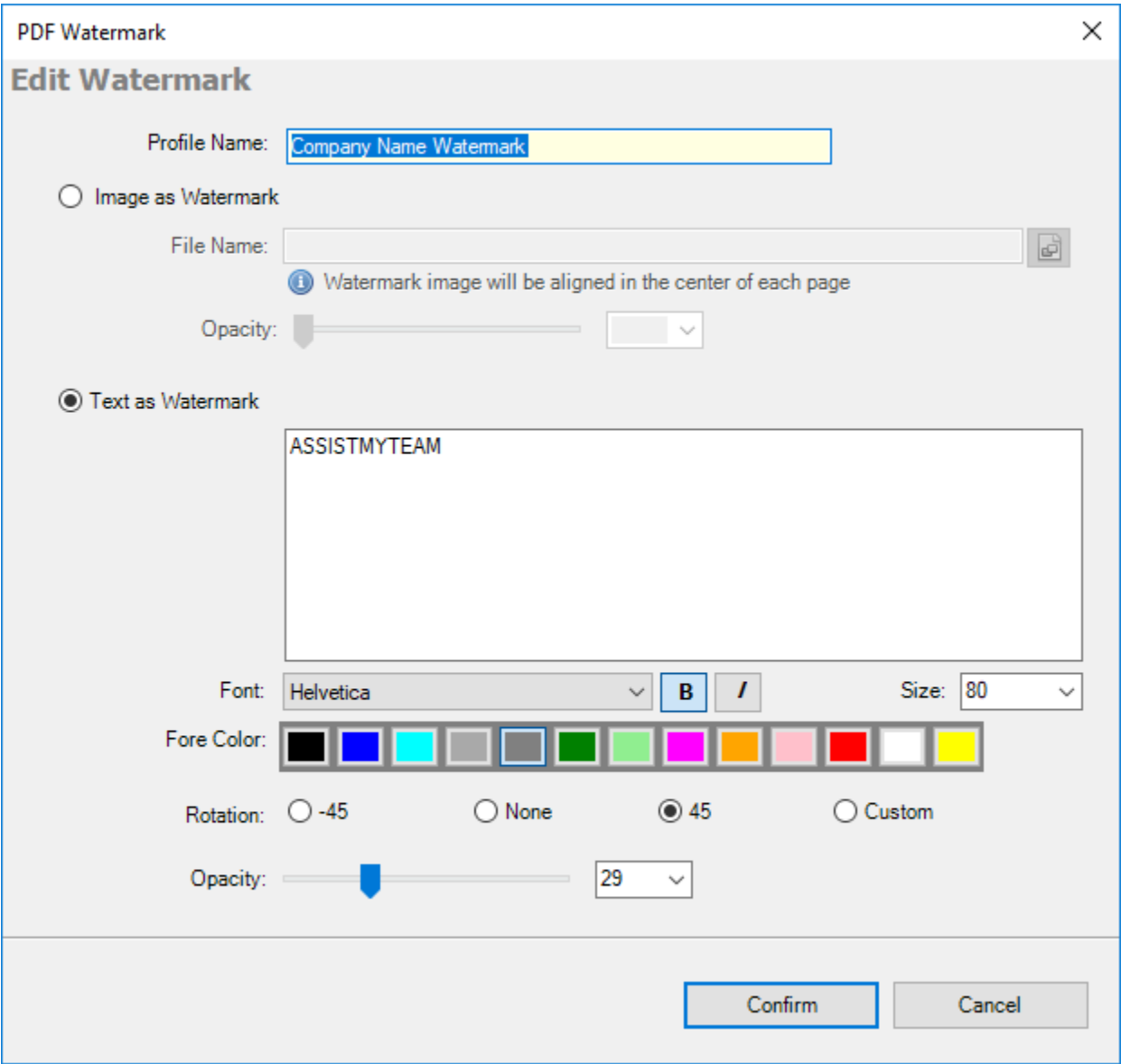
### 13. Add watermark (logo or brand) to your PDF output

Adding watermark is a simple way to secure your PDF content. A watermark easily lets viewers identify the status of your PDF content, for instance, as confidential or for internal use only.

To add a watermark image or text annotation to your PDF files, you will need to create a profile under **Outlook > Email to PDF toolbar > Output Settings > Watermark** tab.

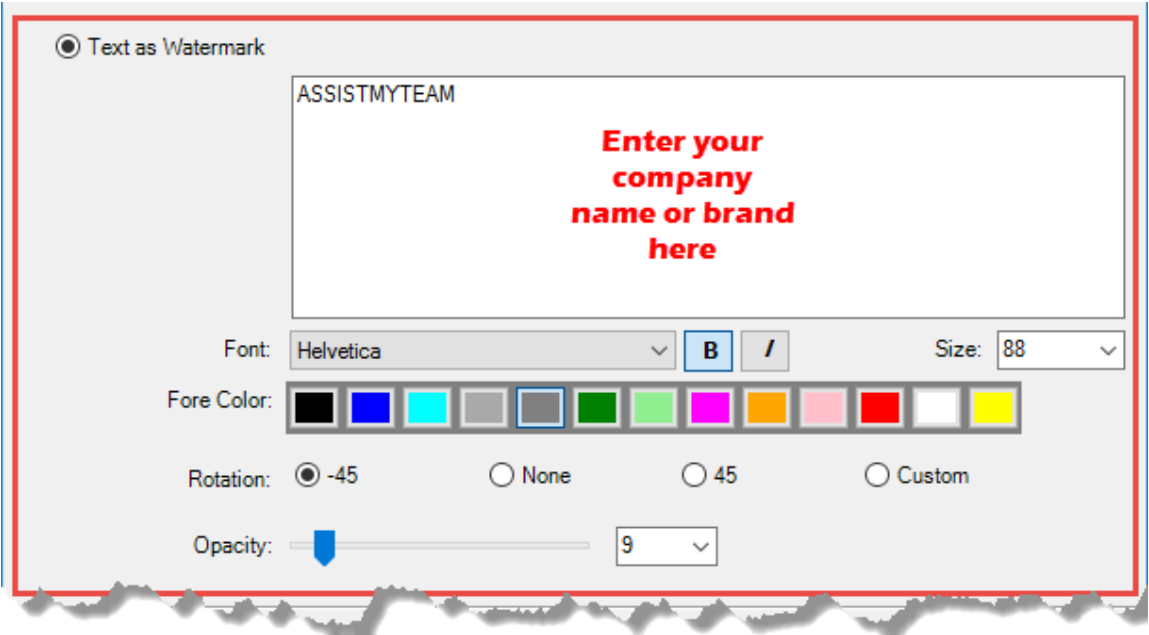


Click the **'New'** button to create a watermark profile. You'll get the following dialog box where you can choose the type, position of your watermark. You have two options on how to create a watermark:

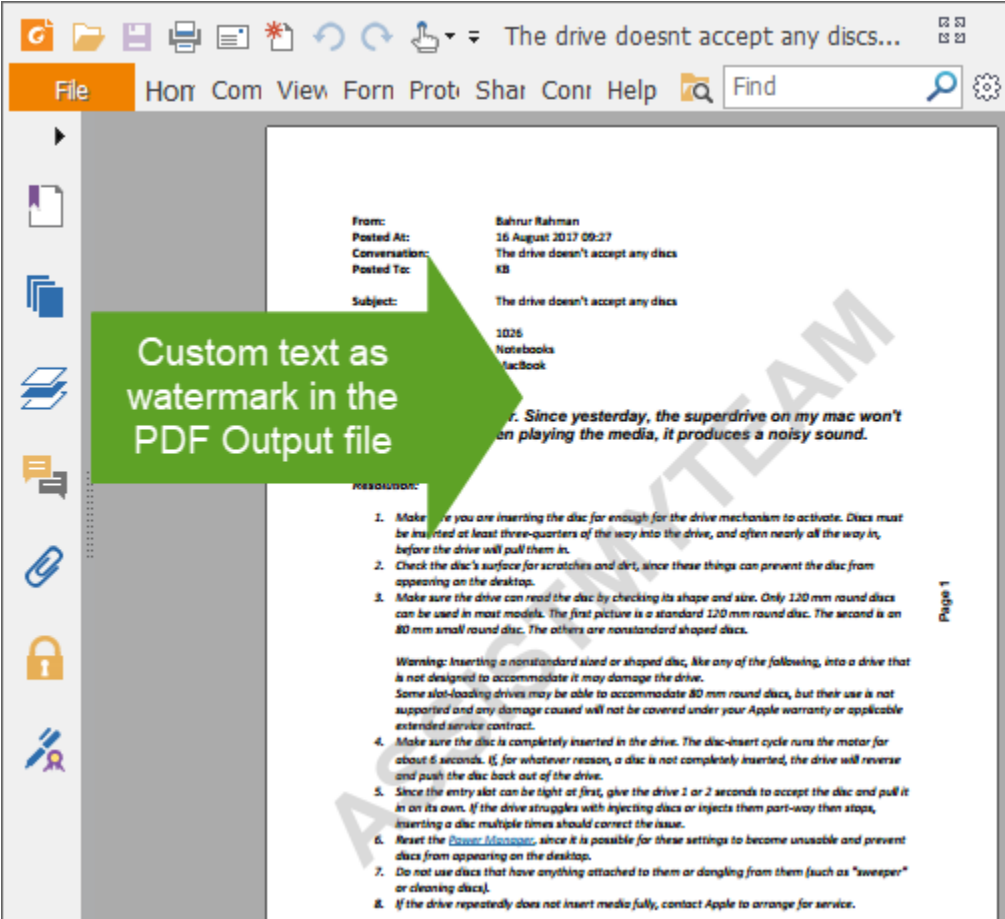


**Text as watermark** - Click on the 'Text as watermark' radio option. Type in your text (such as your company name or brand etc.). Customize the Font, Size, and Color of your text watermark. You can adjust the opacity of the watermark to allow text from behind to show through. You can also adjust the

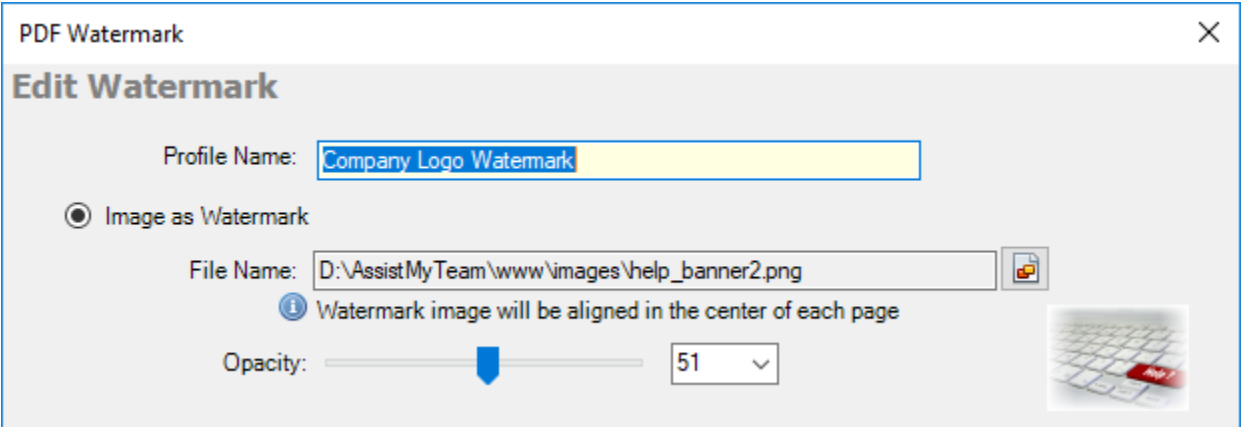
angle and rotation at which you want the watermark.



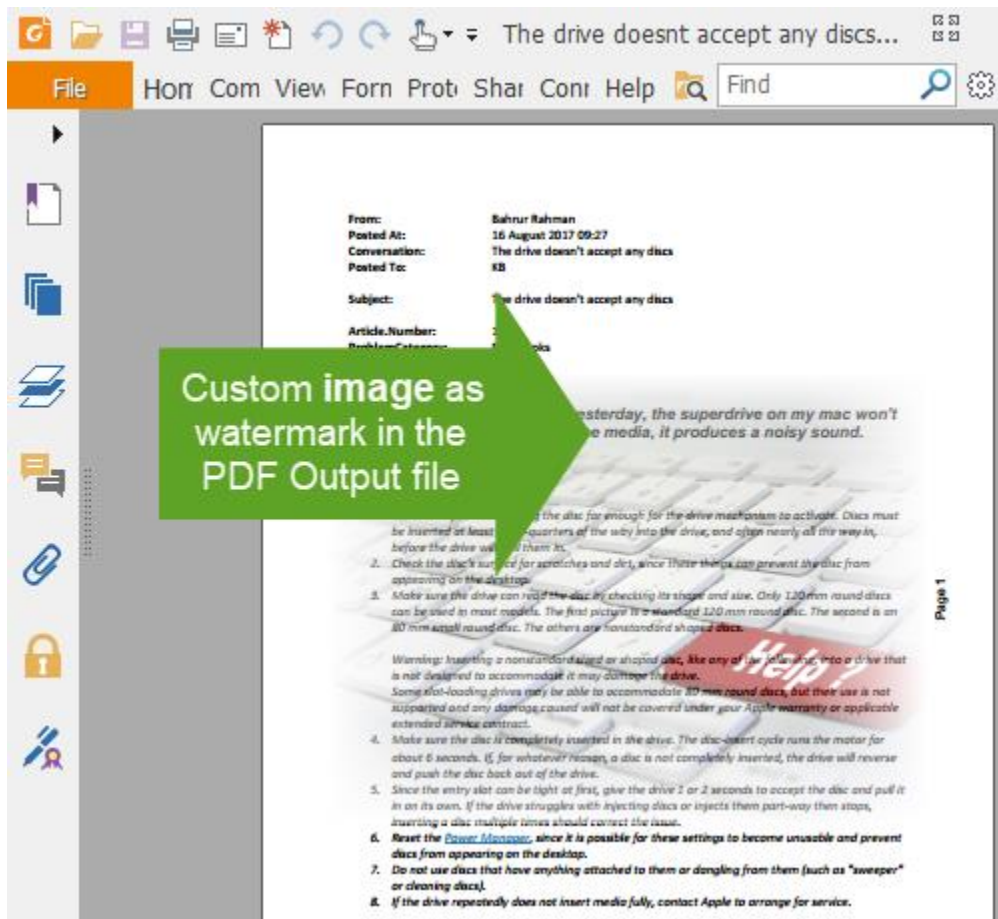
And this how the converted PDF file appears like when viewed in PDF viewer - with the custom text (e.g., company name embossed in each of the page)



**Image as watermark** - Click on the 'Image as watermark' radio option. To insert an existing image as a watermark, click on the Image button located at the extreme right corner and browse the open dialog box and select your image from your computer.

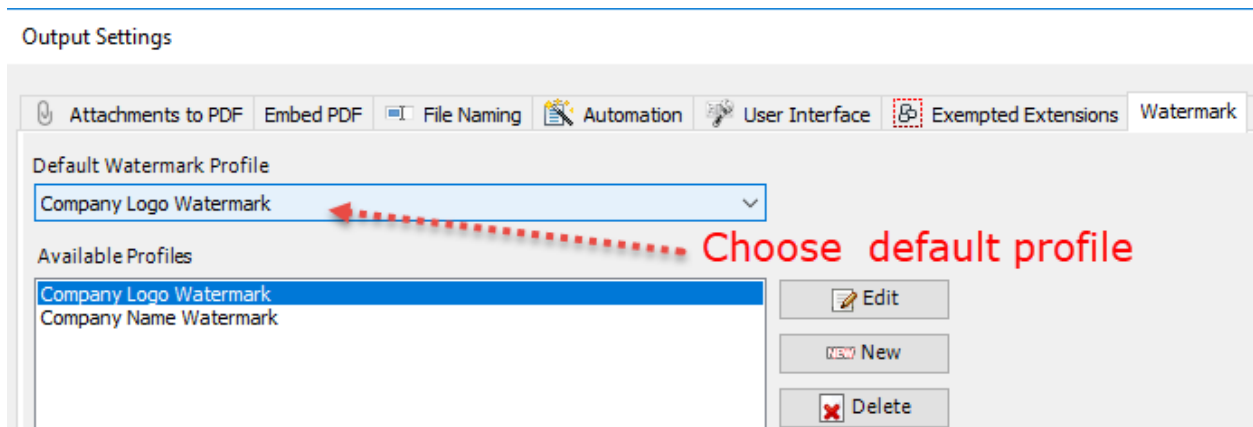


And this is what the converted PDF file looks like (in PDF reader software) - with the image embedded in the middle of each page of the PDF.



Adding a watermark of your company logo or brand on publication material not only adds a professional touch but also identify ownership without completely locking the PDF down. More importantly, watermarking each page of your PDF helps protect your intellectual property from being passed off as someone else's work when it is shared with others.

**NOTE:** It is possible to define multiple watermark profiles. However, you will have to choose only one default profile that would be applied to the PDF generated by the add-in in Outlook. And you do that from the drop-down field.

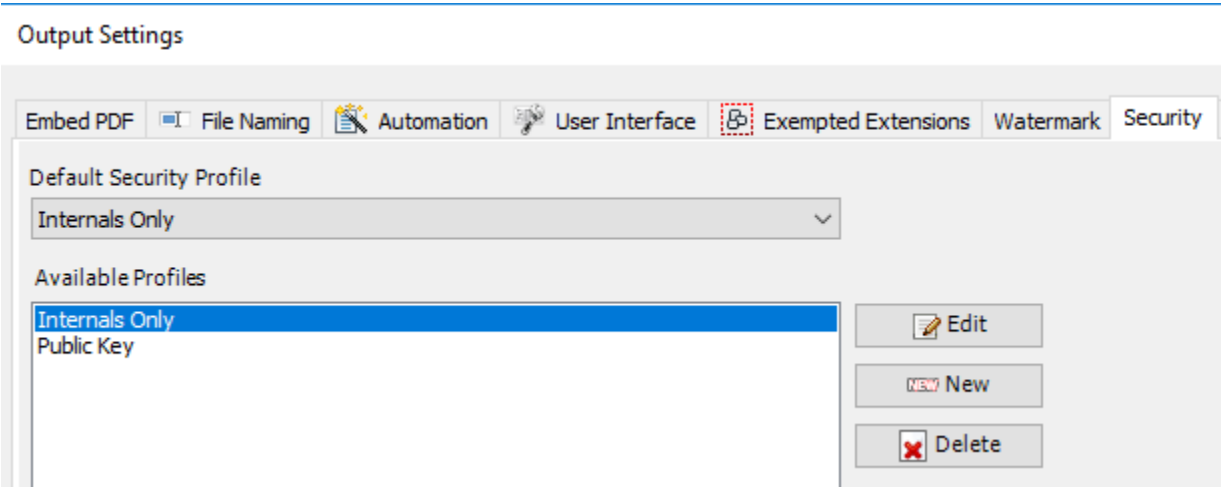


And doing this will apply the chosen watermark to PDF outputs by default. If you don't want to watermark your PDF files from Outlook, just don't choose any default profile i.e., specify default profile as empty.

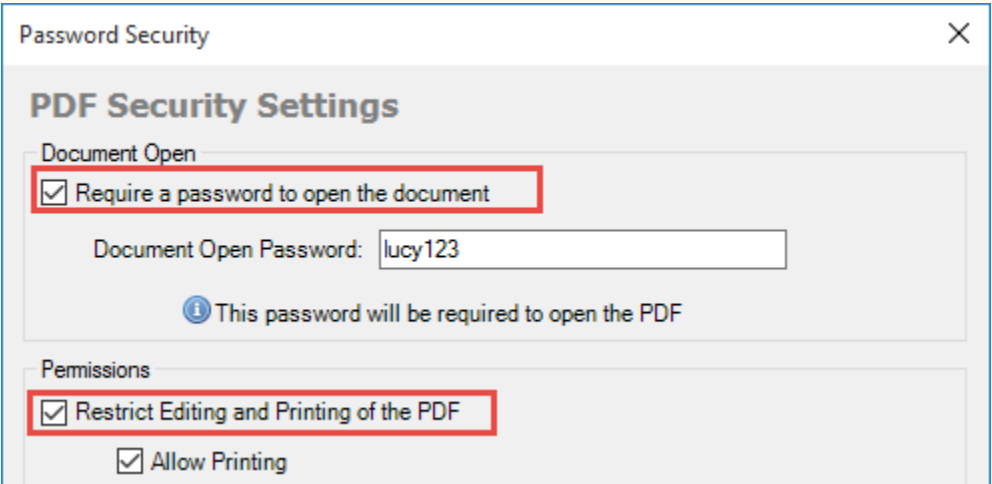
## 14. Add PDF security options – password and permissions

A PDF file on its own is not as secure as you may think. Despite the versatility of PDF (as a universal file format) that preserves the look and feel of your original document regardless of platform or device, without security settings on your PDF publication, there is no way to prevent malicious users from tampering the file and taking credit for your content.

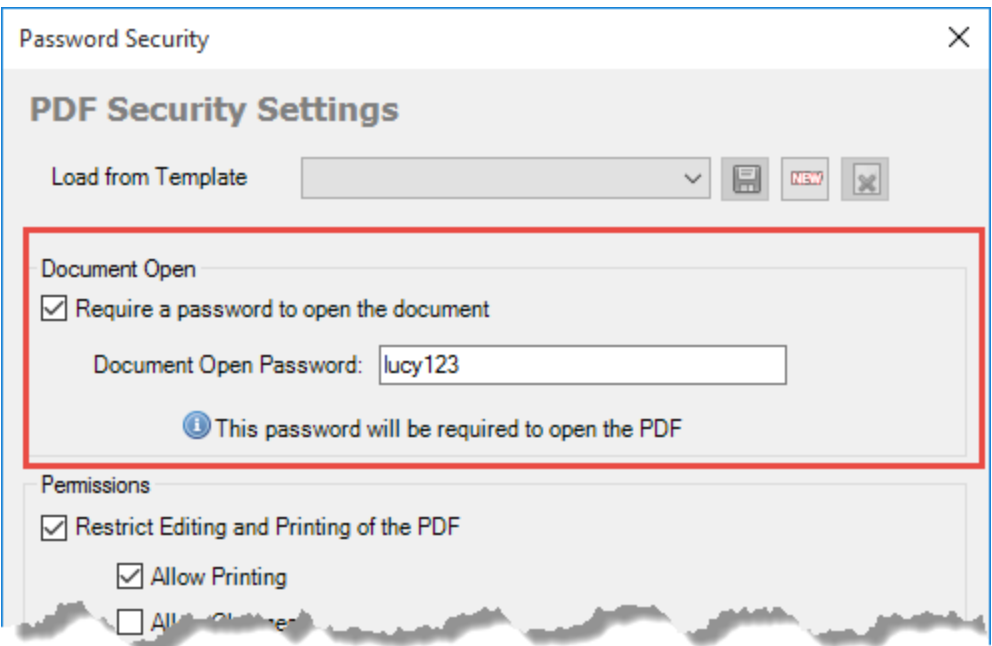
With Email to PDF add-in, you can lock down your PDF content by setting password encryption and limited file permissions. To enable this, you will first have to define a security profile under **Outlook > Email to PDF toolbar > Output Settings > Security tab**.



Click the 'New' button to create a new profile. The security panel option shows up and has two sections - **Document Open** and **Permissions**.

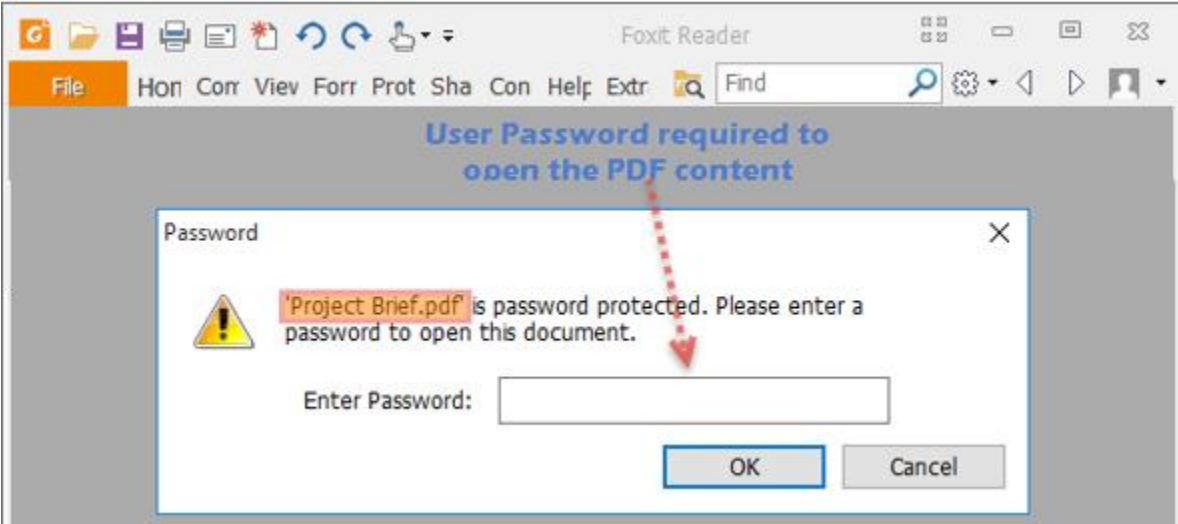


Check the option 'Require a password to open the document' to set a password that will be required by your recipients for opening and viewing in PDF Reader. And type the password in the box.

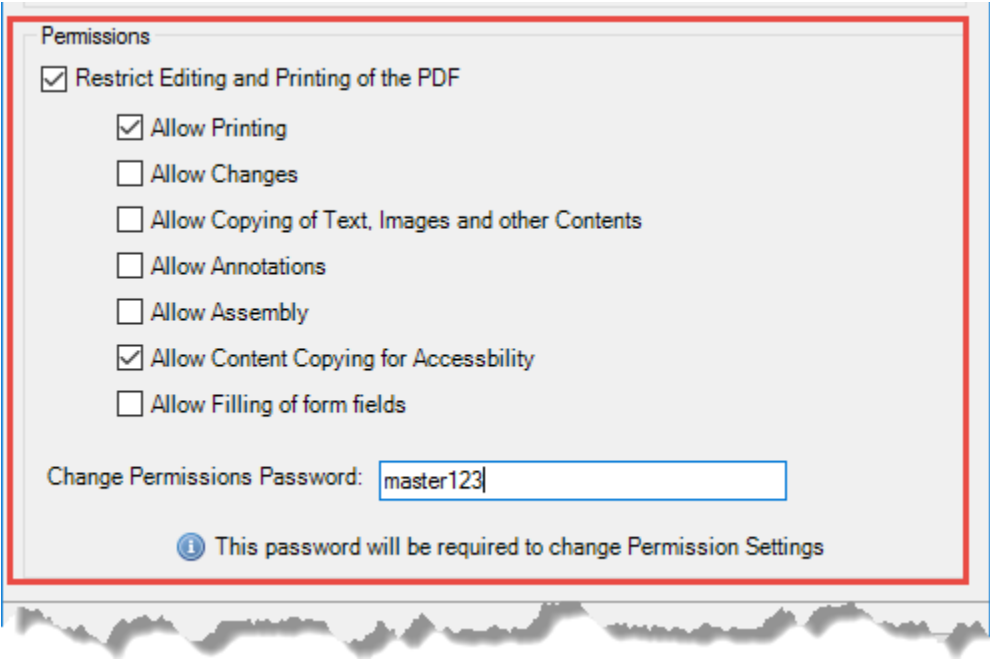




This is the simplest way to filter out your intended recipients from malicious users. With a password, your PDF content is locked and act as a first security layer to secure your information.



Check the option '**Restrict Editing and printing of PDF**' under Permissions section to add another level of security to your PDF content should your file be accidentally accessed.



As of the latest version of Email to PDF add-in, document restrictions put in place can include the following:

- Printing
- Changing the document
- Document assembly
- Content copying
- Content copying for accessibility
- Commenting/Annotations
- Filling of form fields

While people may be able to view it, ensure that viewing is all they can do with it. For example, you could disable copying of text and images but enable printing, helpful if you want to distribute a PDF but want to discourage duplicating parts of your propriety work.

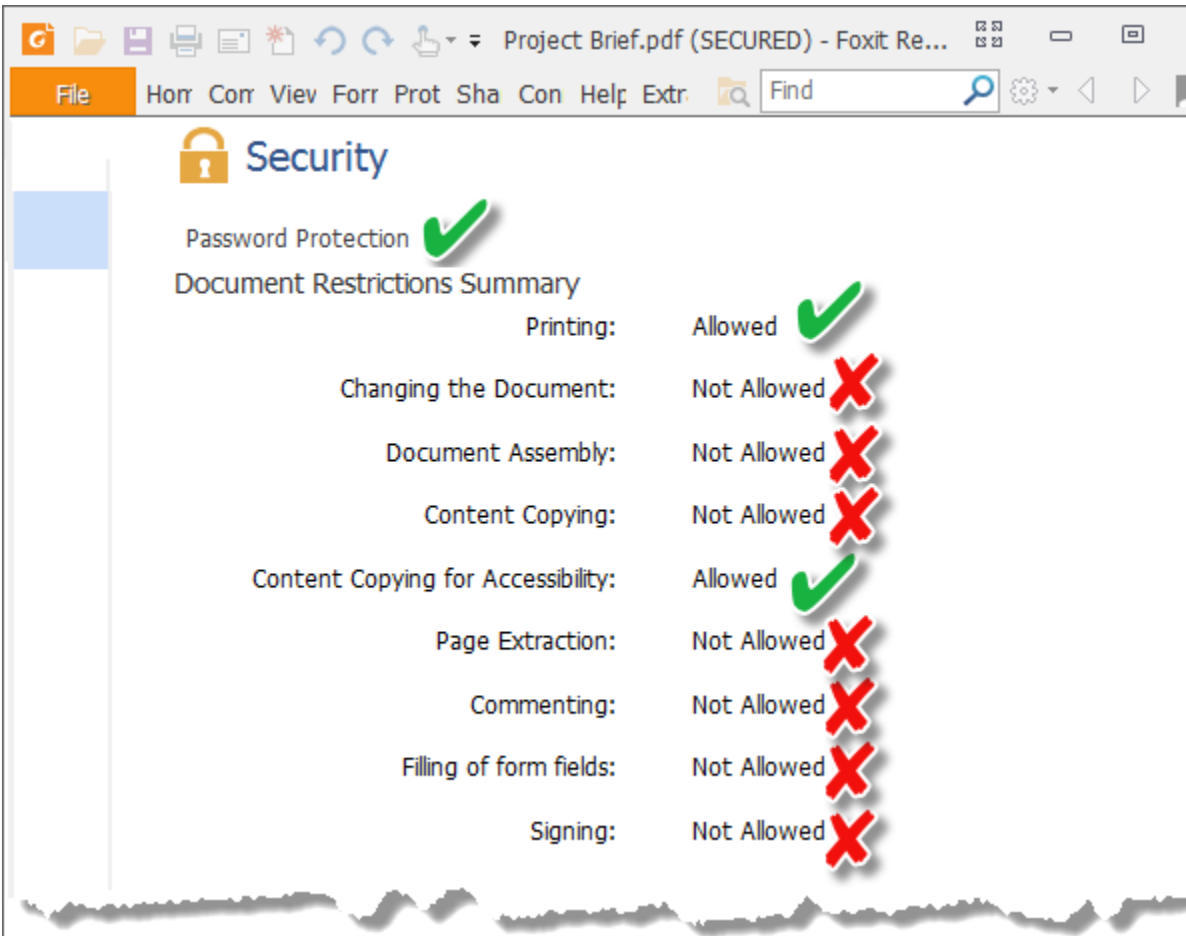
Set a '**Change Permissions Password**' to restrict unauthorized printing, changing, copying, or extracting of a PDF file's content. Only users who have this Password can reset or change these restrictions.

Difference between 'Document Open Password' and 'Change Permissions Password'

**Change Permissions Password** - You can set this password to keep other people from printing, copying or modifying text, adding or deleting pages in your PDF files. (Also known as 'Owner Password')

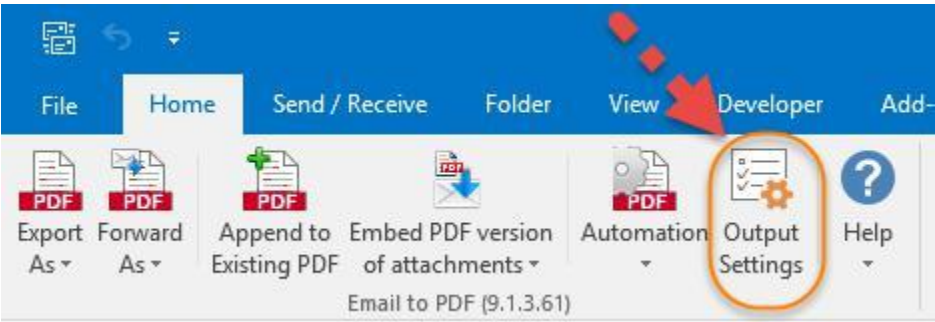
**Document Open Password** – You can set this password to prevent people from opening or viewing your PDF. You can't access and open a PDF file without correct password if it is restricted with user password. (also known as 'User Password')

Checking the PDF’s Properties > Security dialog in any PDF reader, users can see what permissions are given to the file, if any.

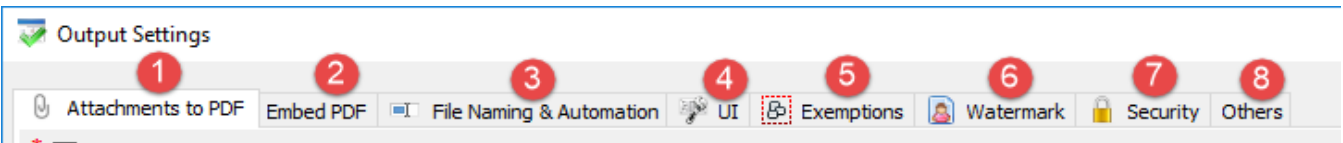


## 15. Settings - Control over the Output

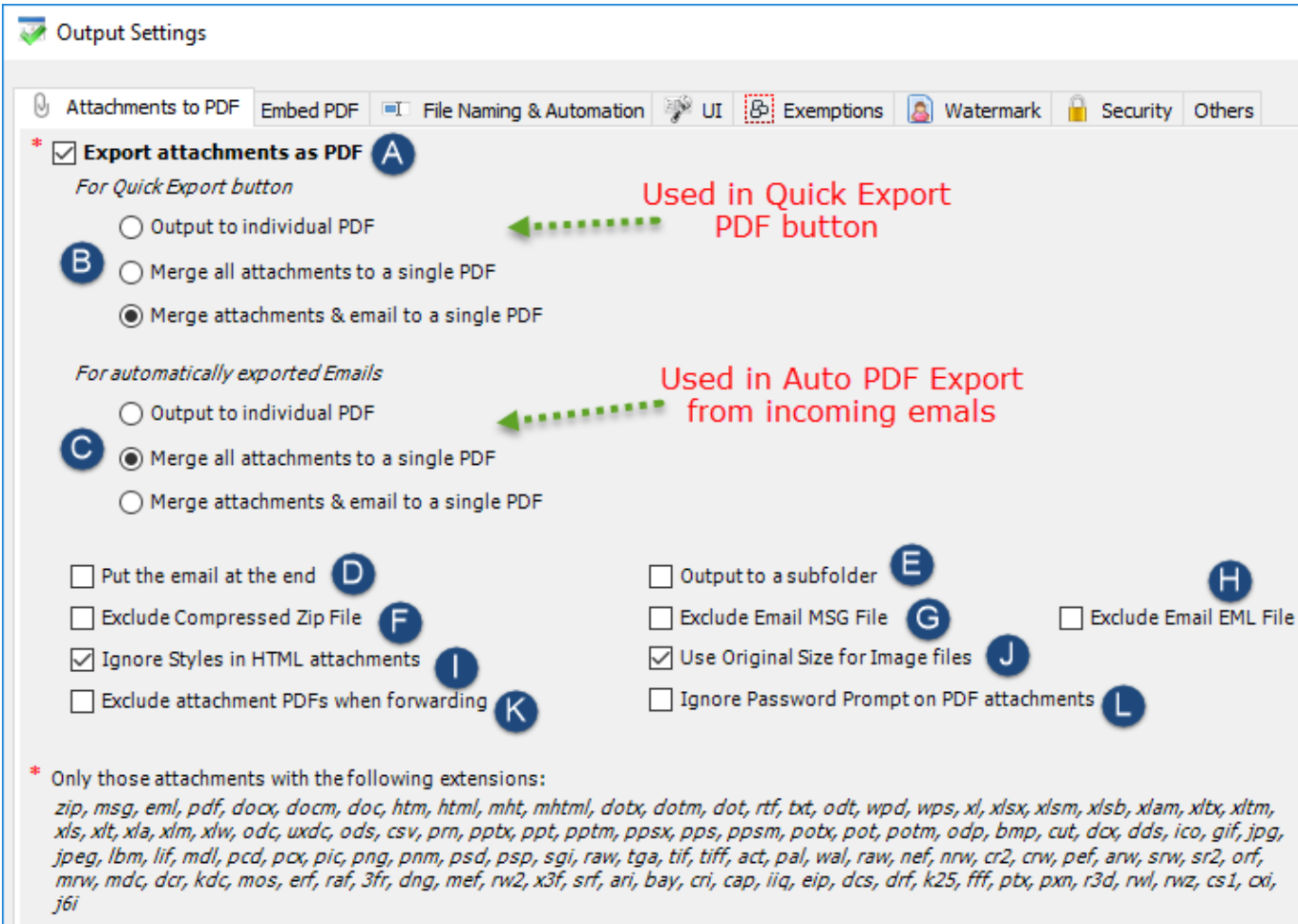
You have complete control over the PDF/XPS document generation. You can customize the default file naming scheme by choosing your own metadata fields, specify the attachments output behavior, choose single or multiple PDF merge options and modify the page setup and layout and the like. You can also define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



There are 8 sections in the Settings Panel:

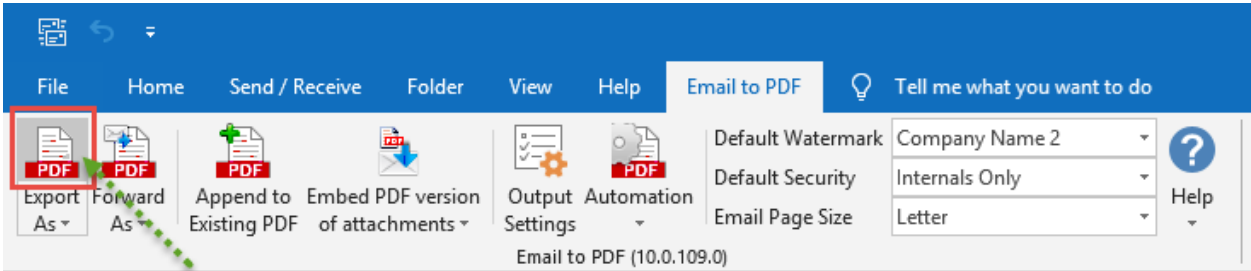


SECTION 1: Attachments to PDF



**A** Enable this option for the add-in to process and convert attachments too to PDF. This is applicable for all PDF conversion options available including **single** or **multiple** mails export, merging multiple mails, forwarding single or merged emails etc.

**B** Use this option to set how the attachments of the email will be outputted to PDF when using the quick export PDF button in the Outlook toolbar.




**C** Use this option to set how the attachments of the email will be outputted to PDF when it is automatically exported from a monitored Inbox.

In both B and C options, the PDF output can be controlled in three ways:

**Output to individual PDF** - Each attachment is converted into individual PDF file. The PDF files are 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 are merged to a single one PDF. This one PDF file is placed under a subfolder (eg. 'documentName\_Attachments\_PDF' assuming the PDF document of the email was saved as 'documentName.pdf'). The single one PDF file that has all the merged attachments will have a name like 'Documents\_mergedAttachments.pdf').

When multiple emails are merged to PDF, all the attachments would be converted and saved to the same subfolder (eg. 'MergedDocumentName\_Attachments\_PDF' assuming the document was saved as 'MergeDocumentName.pdf').

 **Merge attachments & email to single PDF** - All attachments are appended to the PDF document of the mail item. This result PDF file contains 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 are merged to the PDF document.

**NOTE:** Only attachments having the following extensions are supported for converting to PDF format:

*zip, msg, eml, pdf, docx, docm, doc, htm, html, mht, mhtml, dotx, dotm, dot, rtf, txt, odt, wpd, wps, xl, xlsx, xlsx, 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, cut, dcx, dds, ico, gif, jpg, jpeg, lbm, lif, mdl, pcd, pcx, pic, png, pnm, psd, psp, sgi, raw, tga, tif, tiff, act, pal, wal, raw, nef, nrw, cr2, crw, pef, arw, srw, sr2, orf, mrw, mdc, dcr, kdc, mos, erf, raf, 3fr, dng, mef, rw2, x3f, srf, ari, bay, cri, cap, iiq, eip, dcs, drf, k25, fff, ptx, pxn, r3d, rwl, rwz, cs1, cxi, j6i*

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

**D Put the email at the end** – When producing one PDF file by merging email and attachments, the add-in by default place the email content on the top of the PDF document. If you want to place the email body content at the end of the PDF document, enable this option.

**E Output to a subfolder** – When the PDF export from the add-in leads to more than one PDF file, you can enable this option to place the PDF files from converted attachments to a new subfolder.

**F Exclude Compressed Zip file** – Enable this option if you want the add-in to ignore ZIP attachments from being included in the PDF conversion.

**G Exclude Email MSG file** – Enable this option if you want the add-in to ignore MSG attachments from being included in the PDF conversion.

**H Exclude Email EML file** – Enable this option if you want the add-in to ignore EML attachments from being included in the PDF conversion.

**I Ignore Styles in HTML attachments** – Enable this option to force the add-in to filter out any CSS <style> tags from the HTML email content. This may be required at times to remove HTML formatting that are not friendly to Outlook.

**J Use Original Size for Image files** – Enable this option to force the add-in to produce PDF documents from the image attachment in its original size. If unchecked, the add-in will try to resize the image attachment to fit to the predefined page size

**K Exclude attachment PDFs when forwarding** – Enable this option to force the add-in to skip processing of attachments of the original email to PDF equivalent files when forwarding the email.

**L Ignore Password Prompt on PDF attachments** – When merging attachments to a single one PDF file, enable this option to force the add-in to exclude those PDF attachments of the email that are password protected. If unchecked, the add-in will prompt you to enter the open password for that PDF attachment before it can include in the one PDF file.

SECTION 2: Embed PDF

Attachments to PDFEmbed PDFFile NamingAutomationUser InterfaceOthers

Embed PDF version of attachments to Email

\* How do you like the PDF versions of the attachments to be embedded to the original email?

☐ Convert each attachment to separate PDF

☒ Merge all attachments to a single PDF

☐ Merge attachments & email to a single PDF

Flag the email item

☐ None

☒ Completed

☐ Marked

\* Only those attachments with the following extensions:

docx, docm, doc, htm, html, mht, mhtml, dotx, dotm, dot, rtf, txt, odt, wpd, wps, xl, xlsx, xlsx, 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, cut, dcx, dds, ico, gif, jpg, jpeg, lbm, lif, mdl, pcd, pcx, pic, png, pnm, psd, psp, sgi, raw, tga, tif, tiff, act, pal, wal

For embedding PDF version of the attachments back to the email, the PDF output can be controlled in three ways:

Convert each attachment to separate PDF

- Each attachment can be converted into individual PDF file and embedded to the email.

Merge all attachments to a single PDF

- All attachments will be merged to a single PDF and embedded to the email with the 'Documents\_mergedAttachments.pdf'.

Append all attachments to the email PDF

- All attachments and the email itself will be merged to a single PDF file and is embedded to the email.

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, htm, html, mht, mhtml, dotx, dotm, dot, rtf, txt, odt, wpd, wps, xl, xlsx, xlsx, 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, cut, dcx, dds, ico, gif, jpg, jpeg, lbm, lif, mdl, pcd, pcx, pic, png, pnm, psd, psp, sgi, raw, tga, tif, tiff, act, pal, wal

32 | Page



SECTION 3: File Naming & Automation

Attachments to PDFEmbed PDFFile NamingAutomationUser InterfaceOthers

**E-Mail**

1st part of the nameSeparator2nd part of the nameSeparator3rd part of the name

SubjectUnder Score ( )ReceivedTimeUnder Score ( )SenderName

**Appointment**

1st part of the nameSeparator2nd part of the nameSeparator3rd part of the name

SubjectUnder Score ( )DurationNone

**Task**

1st part of the nameSeparator2nd part of the nameSeparator3rd part of the name

SubjectUnder Score ( )DueDateNone

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 3 drop downs from which you can choose 3 metadata fields, and these 3 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.

So, when you choose to export an email and its attachments to a PDF file, the ‘Save As’ dialog box will propose the name of the PDF file to be saved, by deriving the name from the metadata information of the email (as set in this settings section).

Save As

BYTESTATION > Documents

Organize New folder

Quick access

Flag the auto-processed Outlook items as

None

Completed

Marked

Document Exporter

File name: Problem with my Printer!\_01.19.2017.12.31.25\_Francas F.pdf

Save as type: Adobe Portable (\*.pdf)

Subject Received Time Sender Name

Save Cancel

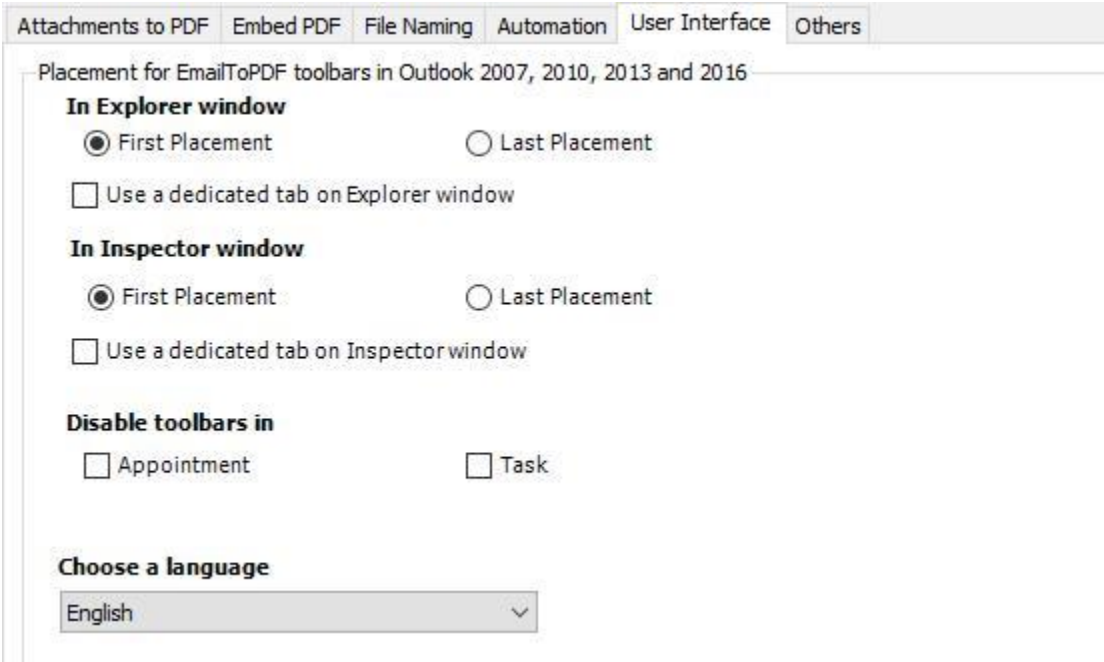
Automation

Emails that were automatically processed to export or embed PDF files (from monitored folders) can be marked with Outlook confirmation tags such as Completed (tick) so that you know which were already processed.

AW: several Helpdesks i...	Thu 1/19/2017 3:56 PM	228 KB	
RE: Welcome to Issue Tr...	Thu 1/19/2017 12:41 PM	108 KB	
Problem with my Printer!	Thu 1/19/2017 12:31 PM	159 KB	
AssistMyTeam : Thank yo...	Thu 1/19/2017 7:05 AM	53 KB	

33 | Page

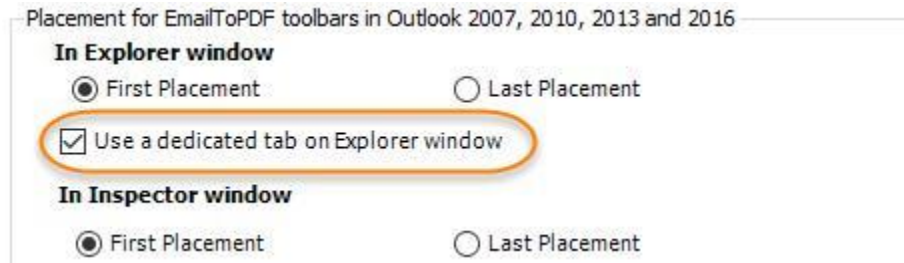
SECTION 4: User Interface (UI)



You can customize how the Email to PDF add-in toolbars/ribbons are placed in Outlook. For instance, maybe you prefer showing the add-in toolbar integrated within the default Outlook Home ribbon tab, such that you have access to buttons of the add-in as well as that of Outlook.



If you want to see the add-in toolbar in a dedicated tab, check the option ‘Use a dedicated tab’ under the Explorer section.



And restart Outlook. You will see that, a new dedicated tab with the title ‘Email to PDF’ is seen just before or after the Outlook default tabs.

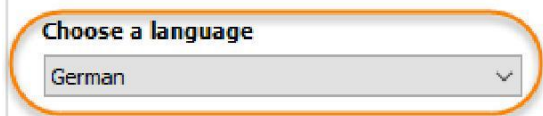


Likewise, you can opt your preference for the add-in toolbar location in inspector window accordingly.

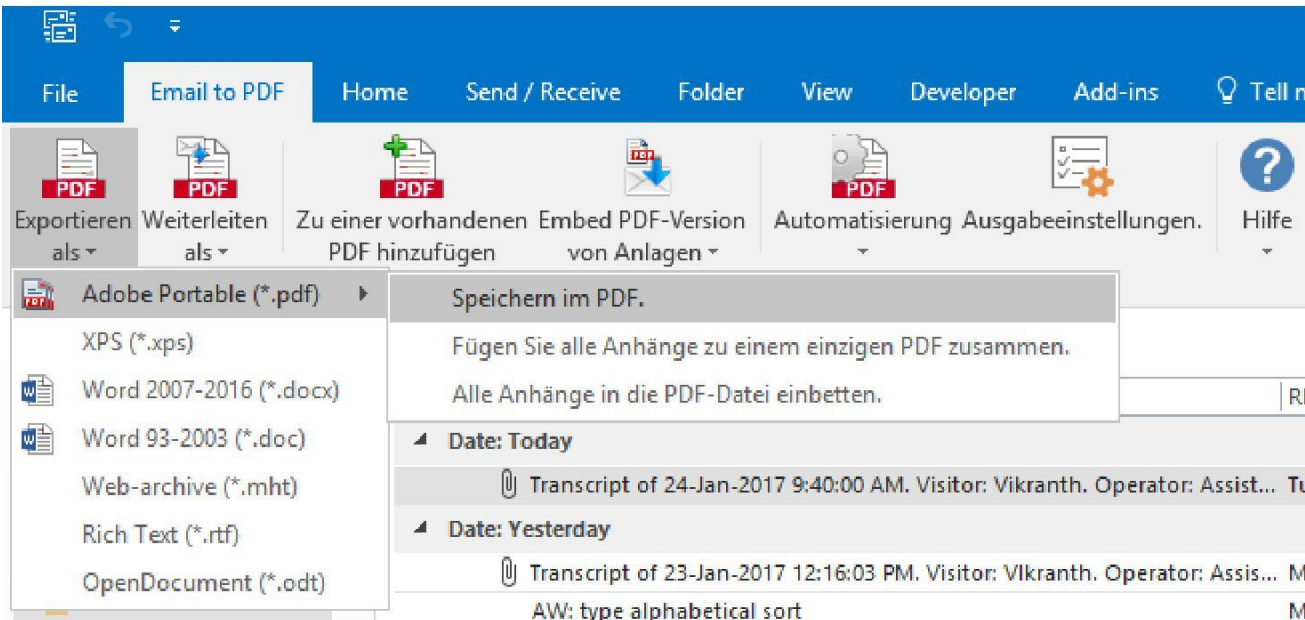
‘Email to PDF’ add-in is available in 16 major languages.

- 1. English
- 2. Chinese (Traditional)
- 3. Danish
- 4. Dutch
- 5. Finnish
- 6. French
- 7. German
- 8. Greek
- 9. Italian
- 10. Japanese
- 11. Korean
- 12. Malay
- 13. Portuguese
- 14. Spanish
- 15. Swedish
- 16. Turkish

To set your own language, select one from the drop down

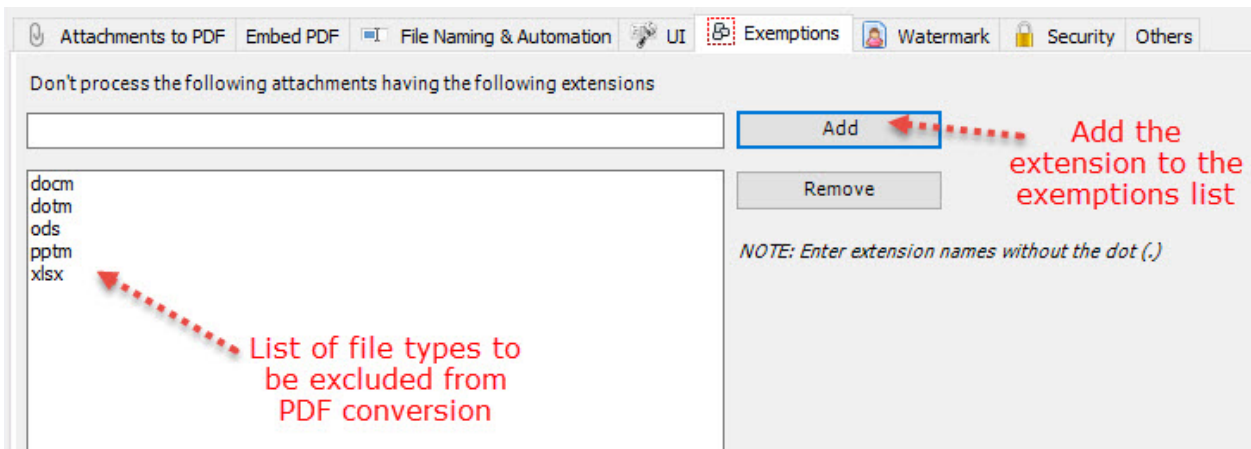


After saving the settings, restart Outlook to apply the language to the add-in.



SECTION 5: Exemptions

You can force the PDF add-in from processing and converting certain attachment types to PDF output by defining a list of file extensions that the PDF add-in would ignore.



**NOTE:** The PDF add-in support seamless conversion of the following 120+ attachment types to PDF:

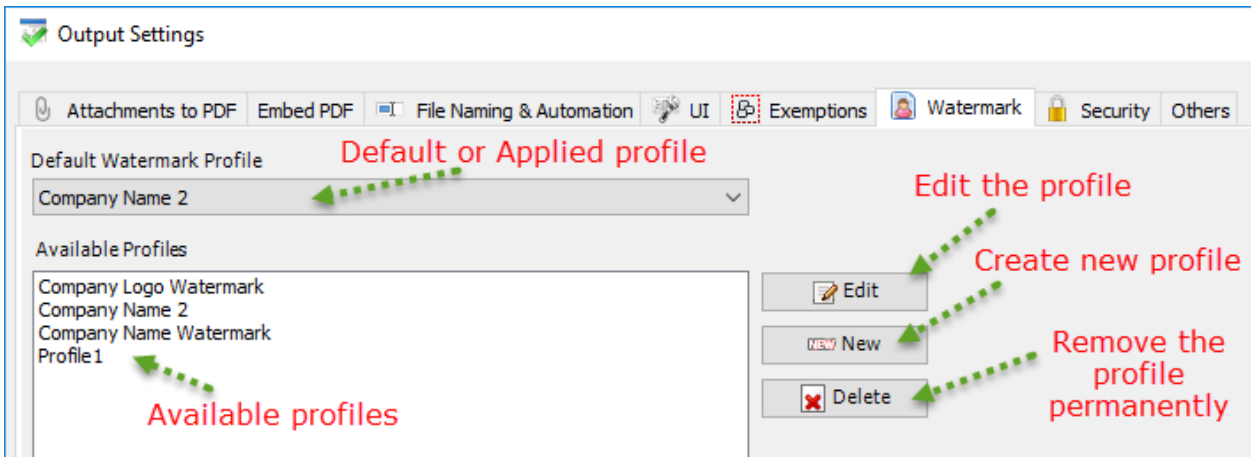
zip, msg, eml, pdf, docx, docm, doc, htm, html, mht, mhtml, dotx, dotm, dot, rtf, txt, odt, wpd, wps, xl, xlsx, xlsx, xlsb, xlam, xltx, xltm, xls, xlt, xla, xlm, xlw, odc, uxdc, ods, csv, prn, pptx, ppt, pptm, ppsx, pps, ppsm, potx, pot, potm, odp, bmp, cut, dcx, dds, ico, gif, jpg, jpeg, lbm, lif, mdl, pcd, pcx, pic, png, pnm, psd, psp, sgi, raw, tga, tif, tiff, act, pal, wal, raw, nef, nrw, cr2, crw, pef, arw, srw, sr2, orf, mrw, mdc, dcr, kdc, mos, erf, raf, 3fr, dng, mef, rw2, x3f, srf, ari, bay, cri, cap, iiq, eip, dcs, drf, k25, fff, ptx, pxn, r3d, rwl, rwz, cs1, cxi, j6i

Any other attachment types that are not included in the supported list will NOT be processed by the PDF add-in for PDF conversion. For instance, if an attachment is of .exe or .msi type, the add-in will ignore such attachments. So, you don't need to explicitly define such unsupported file types in the exemptions list. However, if you want the add-in to ignore certain supported file types from inclusion in the PDF conversion, you can do so.



SECTION 6: Watermark

This section allows you to create watermark profiles. A watermark profile is a series of configuration or choices about an image or text watermark. To create a watermark profile, click on the 'New' button.



Text Watermark

From watermark dialog box, click on the 'Text as watermark' radio option. Type in your text (such as your company name, product name or brand etc.). Customize the Font, Size, and Color of your text watermark. You can adjust the opacity of the watermark to allow text from behind to show through. You can also adjust the angle and rotation at which you want the watermark.

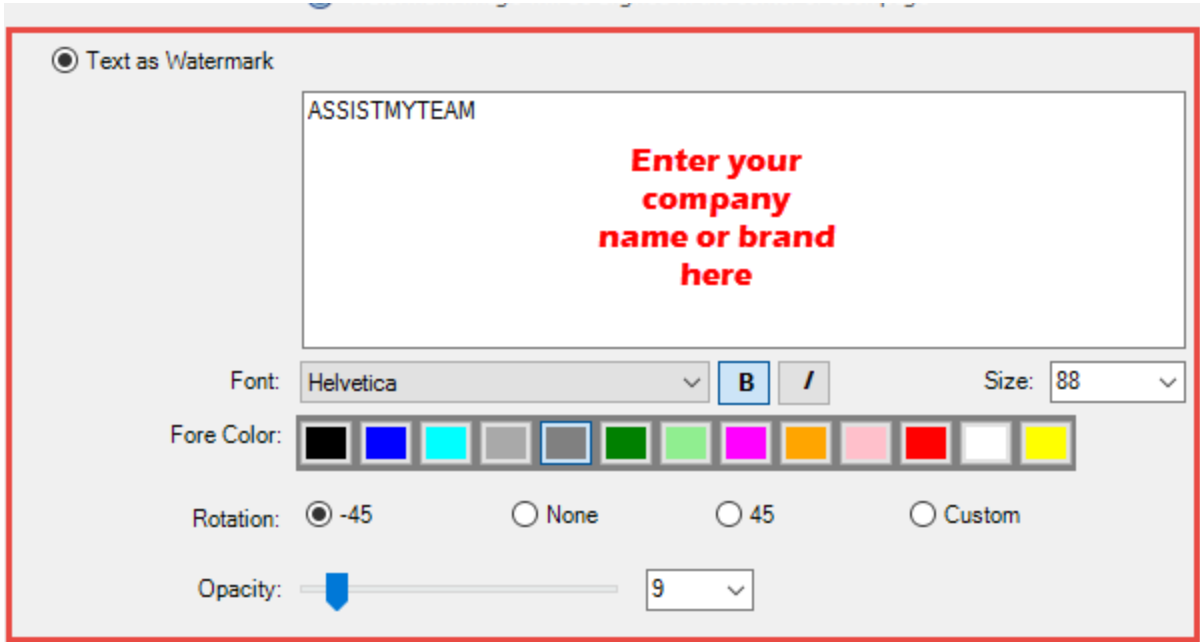
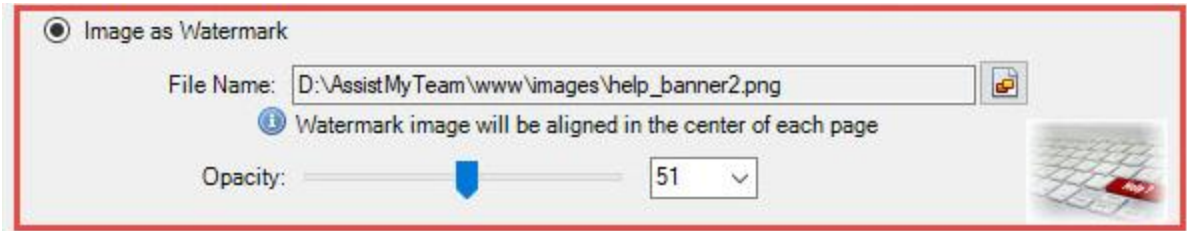


Image Watermark

Click on the 'Image as watermark' radio option. To insert an existing image as a watermark, click on the Image button located at the extreme right corner and browse the open dialog box and select your image from your computer. You can see the preview of the selected image on the right side.

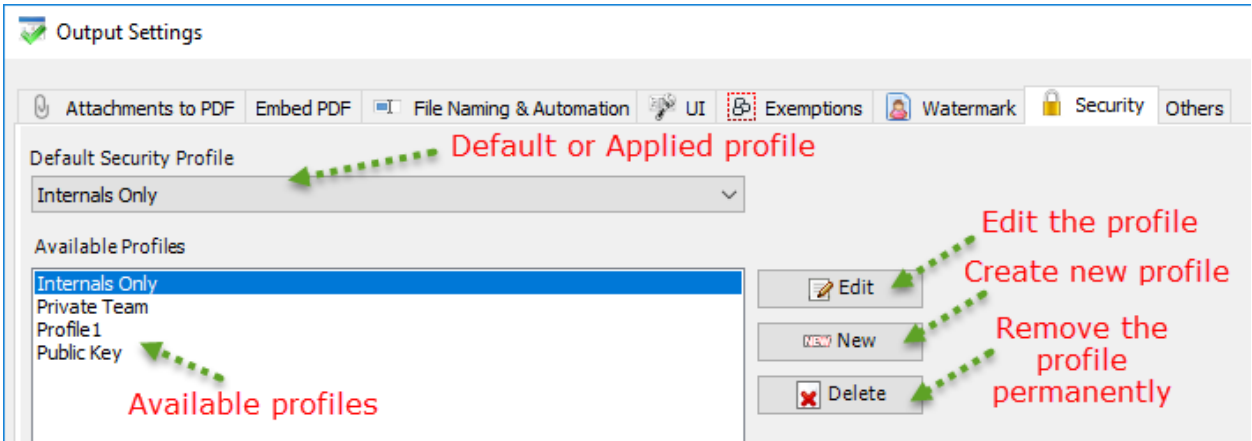


You can adjust the opacity of the image in relative to the background of the PDF document. We recommend an opacity of 25-30% for better legibility.



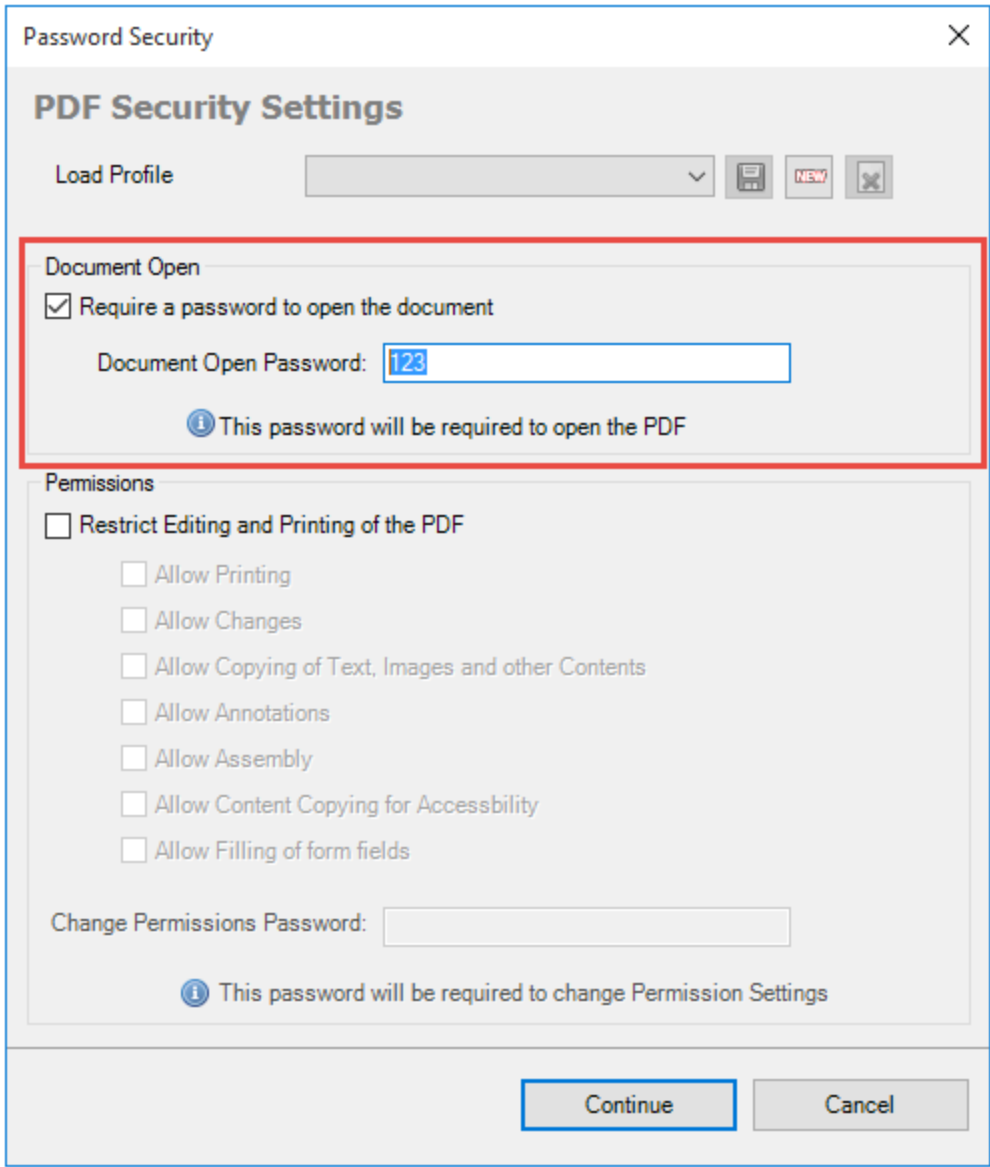
SECTION 7: Security

This section allows you to create security profiles A security profile is a series of configuration or choices on PDF password and permissions. To create a profile, click on the 'New' button.



Document Open Password

Click the 'New' button to create a new profile. The security panel option shows up and has two sections - Document Open and Permissions. Under the first 'Document Open' section, check the option 'Require a password to open the document' to set a password that will be required by your recipients for opening and viewing in PDF Reader. And type the password in the box.



Permissions Password (Master Password)

Under the Permissions section, check the option 'Restrict Editing and printing of PDF' to add another level of security to your PDF content should your file be accidentally accessed. While people may be able to view it, ensure that viewing is all they can do with it. For instance, you can restrict activities from printing content to copying text. You can also set a master password

so that in case you want your team members to perform unrestricted activities on the PDF material, they can do so by entering this master password.

Permissions

☒ Restrict Editing and Printing of the PDF

☒ Allow Printing

☐ Allow Changes

☐ Allow Copying of Text, Images and other Contents

☒ Allow Annotations

☐ Allow Assembly

☐ Allow Content Copying for Accessibility

☐ Allow Filling of form fields

Change Permissions Password:

This password will be required to change Permission Settings

Continue

Cancel

Once done, save the profile. It is possible to define multiple security profiles. However, you will have to choose only one default profile that would be applied to the PDF generated by the add-in in Outlook. And you do that from the drop-down field.

Default Security Profile

Internals Only

Available Profiles

default security profile

Or, even simpler, you can choose or switch to the desired security profile quickly from the PDF toolbar in your Outlook.

File

Home

Send / Receive

Folder

View

Help

Tell me what you want to do

PDF

Export As

PDF

Forward As

PDF

Append to Existing PDF

PDF

Embed PDF version of attachments

Output Settings

PDF

Automation

Default Watermark

Company Name 2

Default Security

Internals Only

Email Page Size

Letter

?

Help

Email to PDF (10.0.108.0)

Attachments to PDFEmbed PDFFile NamingAutomationUser InterfaceOthers

PDF Optimization

☒ Optimize for Quality  
Larger file size

☐ Optimize for Publishing  
Smaller file size

When appending to existing PDF

☒ Output to the existing PDF

☐ Output a new file

Attachments Output

☐ Output attachments to a subfolder

☒ Exclude inline images

☐ Exclude hidden attachments

☐ Overwrite existing files (if any)

☐ Exclude attachments output on automation

Page Setup

Paper Size

A4

Orientation

☒ Portrait

☐ Landscape

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.

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.

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').

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

## 16. 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
- ✔ 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*)
- ✔ *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

## 17. Important Links

- [Email to PDF - Home page](#)  
Go to the website of **Email to PDF for Outlook**.
- [Video Tutorials](#)  
Quickly learn how to use **Email to PDF for 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.
- [About single file Web pages \(MHTML\)](#)  
Know more about single file Web pages (MHTML)
- [Contact us](#)  
Ask us any question