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 <u>video demonstration</u> available on the product website.

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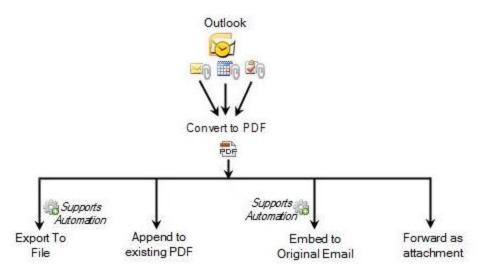
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1. Introduction to Email to PDF

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 realtime 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*) NEW
- Secure PDF documents by setting a user password for viewing NEW
- Set security restrictions to PDF documents such as ability to edit or print NEW
- 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 <u>120 or more different formats</u> 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.

File Home	Send / Rec	oivo Fo	lder	View De	eveloper	Add-ins	Q Tell me w	hat you
File Home	Send / Rec	eive ro	laer	view De	eveloper	Add-Ins	¥ Tell me w	nat you
Export to Attach and File * Forward *	PDF Append to Existing PD		ments *	Automatic	on Output Settings	() Help	New New Email Items • New	fingt ligt Market Cle So Jur
Auto	<	All Un	read					
		100	SUBJEC	Т				RECEI
D ST Inbox 55		9 88 - 8 - 8	AssistM	yTeam : Than	k you for yo	ur purchase	e	Fri 1/2
Drafts			New Su	pport Reque	st: Database	Exporter f	or Outlook	Thu 1,
Dent Items			AW: sev	eral Helpdes	ks in one co	mpany / ur	gend request info.	Thu 1,
Delendar		2	RE: Wel	come to Issue	e <mark>T</mark> racker for	Outlook &	SharePoint (Tea	Thu 1,
			Problem	n with my Prin	nter!			Thu 1,

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.

P	÷ ÷							
File	e Home	Send / Receiv	e Folder	View D	eveloper	Add-ins	🛛 Tell me w	hat you
Expor File	F PDF t to Attach and	PDF Append to E Existing PDF	mbed PDF versior of attachments *	Automati	on Output Settings	Pelp	New New Email Items •	िह्न Ign 🍋 Cle 🇞 Jun
	Adobe Portable	(*.pdf) 🕨	Output to indi	vidual PDF			New	
	XPS (*.xps) Word 2007-2016		Merge all attac	REC				
	Word 93-2003 (* Web-archive (*.)	122-0122	AW: several Helpdesks in one company RE: Welcome to Issue Tracker for Outlo				Select the ema to be exported to PDF	
	Rich Text (*.rtf)			m with my Pri		Collina		.iu 1/
-	OpenDocument encrypted cmar			/lyTeam : Than m Helpdesk	k you for yo	ur purchas	e	Thu 1/ Wed 1

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).

Versio 2	10 107/00/00/C4E 00	
U Versio	Export as PDF +	Convert each attachment to separate PDF
🛛 Versio 🔚	Forward as PDF	Merge all attachments to a single PDF
Medium (2 🚠	Embed PDF version of attachments 🔸	Merge attachments & email to a single PDF
🛛 Versio 🏣	Append to Existing PDF	Merge all attachments to a single PDF (Advanced)
U Versio	Copy Right-Click	Merge attachments & email to a single PDF (Advanced)

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.

Organize 🔻 New folder	
 My Documents Add-in Express 	Documents library My Documents Folder Folder
 BlackBerry Bluetooth Exchange Camtasia Studio CyberLink Helpdesk Data Helpdesk Reports My Attachments My Data Sources 	Name Microsoft Action Pack Develo New Bug.pdf Payment Processed.pdf RE- New Enquiry Submitted RE- Team Helpdesk for Outlook TeamTimeSheetClient ndf
File name: RE- Requ Save as type: Portable I	resting change to the Sharepoint List Mapping_20-09-2011 1-20-00 PM

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.

For Outlook Mail Item <i>1st part of the name</i>	Separator	2nd part of the name
Subject	• Under Score (_) 🔹	ReceivedTime
For Outlook Appointment Item Ist part of the name	Separator	2nd part of the name
Subject	Under Score ()	CreationTime
Subject		
For Outlook Task Item	Separator	2nd part of the name

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:

File	Home	e Send / R	leceive	Folder	View	Help	Q	Tell me	what yo	u want t
PDF	PDF	PDF			PDF	·		?	=	
	Forward As ∗			PDF version achments *	Automat *	ion Outpu Setting		Help •	New Email	New Items •
	Adobe Port	table (*.pdf)	•	Output to	individual	PDF				
1	XPS (*.xps)			Merge all a	attachment	ts to a sing	jle PD)F		
W	Word 2007-	-2019 (*.docx)		Merge atta	chments &	k email to	a sin	gle PDF		
	Word 93-20	003 (*.doc)	1	Merge all a	attachment	ts to a sing	jle PD)F (Adva	nced)	
	Web-archiv	/e (*.mht)		Merge atta	chments 8	k email to	a sin	gle PDF (Advance	d)
1	Rich Text (*	(fth '				0				

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.

🐖 Customize Files Order	×
Order List	
Files Image: State	Continue Cancel
Choose Watermark profile V	
Choose Security profile V	
Paper Size A4 V	
Orientation Portrait Landscape	
PDF Size Optimization Optimize for Quality Optimize for Publishing Large file size Smaller file Size 	

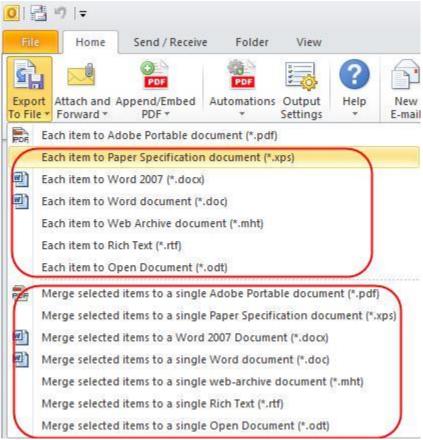
Forward As: You can convert an email and its attachments to PDF and attach it to a new empty email to forward it to a recipient.

File	Ho	ome	Send / Receiv	e Folder	View				
Export To File *	Attach Forwa	ard -	PDF Append/Embed PDF ▼	Automations	Output Settings	() Help	New New E-mail Items *	Ignore Ignore Clean Up + Belete Delete	Repl
4 Moni	As Portable Document (PDF) As Microsoft XPS As Word Document 2007 As Word Document (DOC) As web-archive single file (MHT)								
	1	As Wo As we	ord Document (D b-archive single		From			Selected email to be converted to a PDF document then attach it to a new email	
	•	As Wo As we As Ric	ord Document (D					converted to a PDF document then attach it to a new email	Alssue
		As Wo As we As Ric As OE	ord Document (D b-archive single th Text DT Document		older Lisa Bub Becca	iyßling, Th		converted to a PDF document then attach it to a new email	Alssue
	•	As Wo As we As Ric As OD p ema	ord Document (D b-archive single th Text DT Document	file (MHT)	older Lisa Bub Becca	iyßling, Th		converted to a PDF document then attach it to a new email	A Issue Helpde

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:



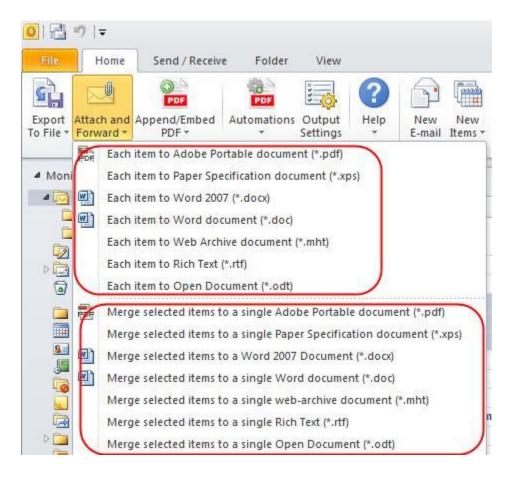
1. Converting each selected email to a corresponding document format in batch.

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:

Organize 🔻 🛛 New fold	ler)III 🔻 🔞
Downloads Recent Places	*	Documents library Includes: 2 locations	Arrange by:	Folder 🔻
🔀 Libraries	н	Name Microsoft Action Pack Development and	Date modified 04-10-2011 09:38	Type Adobe Acrob
Music		🔁 New Bug.pdf	04- <mark>1</mark> 0-2011 09:40	Adobe Acrob
		🔁 Payment Processed.pdf	04-10-2011 09:14	Adobe Acrob
Pictures		🔁 RE- New Enquiry Submitted from Contac	04-10-2011 10:51	Adobe Acrob
Videos		🔁 RE- Team Helpdesk for Outlook - Version	04-10-2011 09:44	Adobe Acrob
		🔁 TeamTimeSheetClient.pdf	15-01-2011 12:10	Adobe Acrob
🜏 Homegroup	+	٠ m		•
File name: Payn	nent Invoi	ices for last 4 days		•
Save as type: Porta	ble Docu	ment (*.pdf)		-

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.



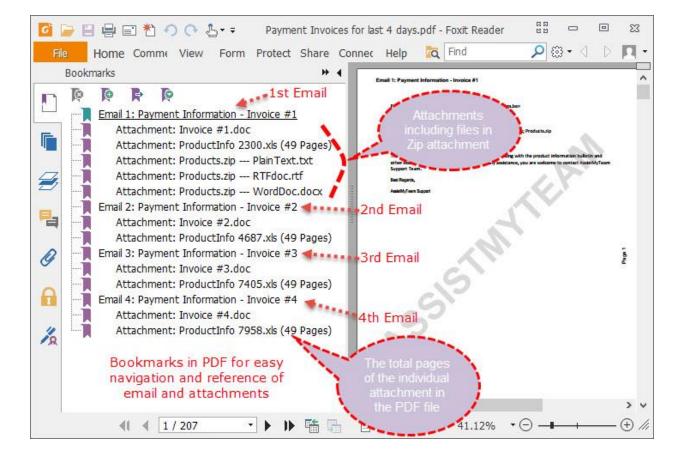
- 1. Generating individual PDF or document format from each of the selected email or Outlook item in batch is one of the striking options.
- 2. Merging all selected emails into one, and then converting it to a single PDF or document format is another option.

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.

	-5 -	
File	Home Send / Receive Folder	View Help Q Tell me what you want to do
PDF Expo As •	rt Forward Append to Embed PDF version	Output Automation Default Watermark Company Logi ▼ Internals Only ▼ Default Security Internals Only ▼ Help
.	Adobe Portable (*.pdf)	ail to PDF (10.0.108.0)
P	XPS (*.xps) Word 2007-2019 (*.docx)	All Unread
P	Word 93-2003 (*.doc)	☆ ⊡ © SUBJECT SIZE
	Web-archive (*.mht) Rich Text (*.rtf)	Payment Information - Invoice #1 Payment Information - Invoice #2 Payment Payment Information - Invoice #2 Payment PaymentPayment Payme
	OpenDocument (*.odt)	Payment Information - Invoice #3 138 KB Payment Information - Invoice #4 138 KB
	Merge to a single Adobe Portable (*.pdf) 赵	4 emails selected for
	Merge to a single XPS (*.xps)	merging into a single one PDF file

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.



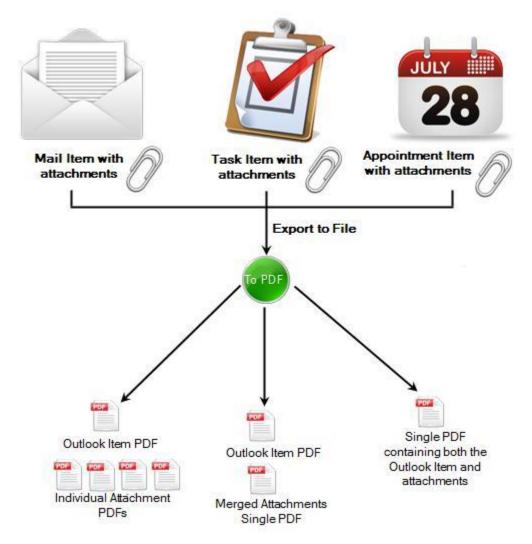
7. Appending selected Outlook items to an existing PDF file

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.

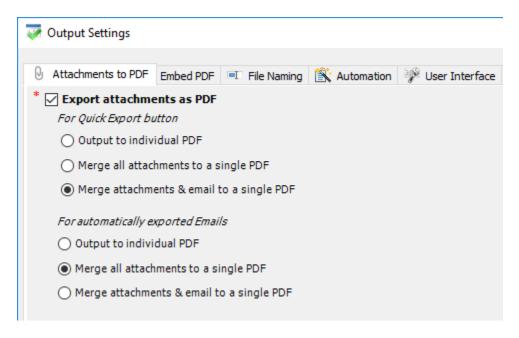
₽5 ÷								
File Home	Send / Receive	Folder	View	Developer	Add	-ins	♀ Tell I	me wha
	Append to xisting PDF of attach		Automation	Output Settings	() Help		New Items *	اور کے اور کے ایر
Clutter 7	All	Unread						
 Inbox 55 Trafts 	企	D 0 SUBJ	ECT Support Rec	uarti Datab		tarfor(utlook	1
Dent Items	1		everal Helpo					t info
Calendar encrypted Encrypted	nails	RE: W	elcome to Is em with my	sue Tracker Printer!	for Outlo	ok & Sh	arePoint ((Tea

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) ¹Compressed Zip (.zip) ²MSG Email file (.msg) ³EML Email file (.eml)

⁴Camera 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)

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

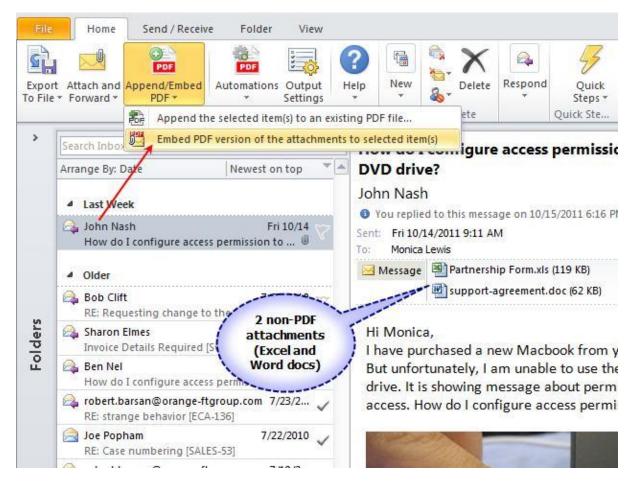
Inability to view various attachment file formats within an email is a common problem for those who own an iPad, iPhone or other tablet device. PDF format support is, however, built-in natively in most of these devices and you can easily preview the PDF attachment within the email.

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:



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

How do I	configure access permission to r	ny DVD drive?
John Nash	1	
Follow up You replie	d to this message on 10/15/2011 6:16 PM.	
Sent: Fri 10/1	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)
and the second sec	chased a new Macbook from the second	

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'.

Specify a Mailbox/F	older for automatic ei	mbedding of PDF version of the	
🐴 🔘 Mailbox	🔁 🖲 Folder	Select Folder	Save Change
Monitored folders &	Mailboxes		Exit
Path			
the second se			
	onicaLewis@AssistMyTea	m.local\All Public Folders\Feedbacks	
Support	onicaLewis@AssistMyTea	m.local \All Public Folders \Feedbacks	Mailborns and amail
🐣 Support 🐣 John Nash		m.local \All Public Folders \Feedbacks	Mailboxes and email folders specified for
🐣 Support 🐣 John Nash	onicaLewis@AssistMyTea sistMyTeam.local\Inbox	m.local\All Public Folders\Feedbacks	folders specified for automatic embedding of
🐣 Support 🐣 John Nash		m.local \All Public Folders \Feedbacks	folders specified for automatic embedding of PDF version of
🐣 Support 🐣 John Nash		m.local\All Public Folders\Feedbacks	folders specified for automatic embedding of

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.

Hon	ne Send /	Receive Folder	View	Developer	Add-ins	♀ Tell	me what you w
PDF Forward As *	Append to Existing PDF		Automation	Output Settings	Help New Emai		r clean Up る Clean Up る Junk マ
All L	J <mark>n</mark> read	Email to PDF (9.1.3.6	Link	LICENSING SERVICES	to PDF and othe Iding of PDF ver		

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.

😤 🔘 Mailbox	🔁 🖲 Folder		Select Folder				<u>S</u> ave (
xport Settings							E
Selected folder/mailbox	John Nash						
Document format	Adobe Portable D	ocument ((PDF)			-	
Destination Folder	\\AMTServer\John	n Nash\Do	cs				
	Overwrite exist	ting docun	nent (if any) <i>Separator</i>		2nd part of the name		
Document Name	Subject	+	Hypen (-)	÷	ReceivedTime	•	
Click 'Updatı	Specify a name				der Name Update the changes	•>>	
onitored folders & M Path	ailboxes (Click t	o display	the correspo				
John Nash			PDF		75~		
🖹 \\Mailbox - Support\Se	ent Items		PDF				
	blic Folders Project	2.9	DOCX				

(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

	olicable for Enterprise license) older to monitor for automatic Export Image: Contract of the second secon
- Monitored folders & Mai	box Select Folder 🕴 🛛 🛜 🔀
Path John Nash I \Wailbox - Support\Sen I \Vublic Folders\All Public	Fol Mailbox - Support Public Folders Favorites All Public Folders AssistMyTean Selected Outlook folder (can be a public folder or a shared folder too!)
Votes III III IIII IIII IIIII IIIIIIIIIIII	S Internet News Projects S Support Requests S Support Calls History

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

Name Title Business Phone Image: Administrator Administrator Andy Mi +443234656 AssistMyTeamSMBSolutions +44665676767 Benjamin +446656434344 Francas Freedi Project Manager Howard Ben +144676767655 Jacob Martin +145446656 Jacob Martin +145664366 John Miller Selected Exchange John More -44656532346	et an option (• Mailbox 🔁 C	Folder Select Mailbox	ĸ	_
 Administrator Andy Mi +443234656 AssistMyTeamSMBSolutions Benjamin Francas Freedi Project Manager +44665676767 Francas Freedi Project Manager +44665434344 Howard Ben +1446767676555 Jacob Martin Jacob Martin James Scott Selected Exchange +44656543434 +135455666 John More John Nash 				ced Find
 Andy Mi +443234656 AssistMyTeamSMBSolutions Benjamin Francas Freedi Project Manager H44665676767 Francas Freedi Project Manager +44665434344 +144676767655 Jacob Martin Jacob Martin Jacob Martin James Scott James Scott Selected Exchange +44656543434 +135455666 +4465632346 	Name	Title	Business Phone	Lo
F Monica Lewis Auditor +154654365 F Monica Lewis Auditor +445643343434 St ServiceDesk +4467734554	 Andy Mi AssistMyTeamSMBSo Benjamin Francas Freedi Howard Ben Jacob Martin James Scott John Miller John More John Nash Lisa Maurice Monica Lewis ServiceDesk 	Project Manager Selected Exchange mailbox	+44665676767 +44665434344 +14467676767655 +145446656 +446664366 +44656543434 +135455666 +4456532346 +154654365 +445643343434	

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.

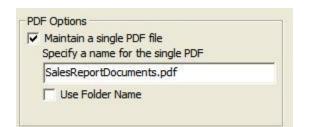
Choose a document format for the automatic export

Selected folder/mailbox	John Nash	
Document format	Adobe Portable Document (PDF)	
Save in	Microsoft Word 97 Document (DOC)	
Maintain a single PDF	Microsoft Word 2007 Document (DOCX) Microsoft Rich Text (RTF) Microsoft Web Archive (MHT)	
	Filtered Web page (HTM) Open Document (ODT)	

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.

Output Settings	
🕖 Attachments to PDF Embed PDF 🗉 File Naming ន Automation 🦻 User Interface 🙆 Exempted Extensions Water	rmark
Default Watermark Profile	
Company Logo Watermark \checkmark	
Available Profiles	
Company Logo Watermark	
New New	
Delete	

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:

PDF Watermark		×
Edit Watermark		
Profile Name:	Company Name Watermark	
🔿 Image as Watermark		
File Name:		
	Watermark image will be aligned in the center of each page	
Opacity:		
 Text as Watermark 		
	ASSISTMYTEAM]
Font:	Helvetica V B / Size: 80 V	
Fore Color:		
Rotation:	○ -45 ○ None ● 45 ○ Custom	
Opacity:	29 ~	
	Confirm Cancel	
	Committee	

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.

Text as Watermark	ASSISTMYTEAM		
	E	Enter your company me or brand here	
Font: Fore Color:	Helvetica	~ B /	Size: 88 🗸
Rotation:	● -45 ○ None	○ 45	◯ Custom
Opacity:	-	9 ~	
10 - 10 - 10 - 10 - 10 - 10 - 10 - 10 -	and the second of	Sec. Sec.	and the second s

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*)

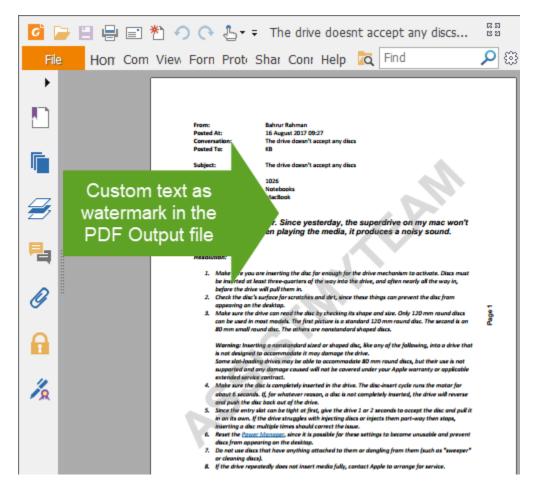
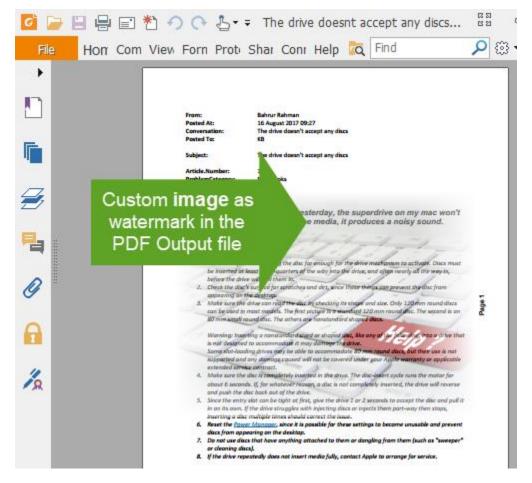


Image as watermark - Click on the 'Image as watermark' radio option. To insert an existing image as a watermark, click on the Image button located at the extreme right corner and browse the open dialog box and select your image from your computer.

PDF Watermark			×	<
Edit Watermark				
Profile Name:	Company Logo Watermark]		
Image as Watermark	:			
File Name:	D:\AssistMyTeam\www\images\help_banner2.png	6		
0	Watermark image will be aligned in the center of each page			
Opacity	51 🗸			

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.

<u>NOTE</u>: 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.

Output Settings							
Attachments to PDF	Embed PDF	💷 File Naming	🖄 Automation	🦻 User Inte	erface 💩 I	Exempted Extensions	Watermark
Default Watermark Profi	le						
Company Logo Waterma	rk 🚽 👞			\sim			
Available Profiles				Choos	e defa	ault profile	2
Company Logo Waterma					📝 Edit		
Company Name Waterma	ark						
					01509 New		
					🗙 Delete		

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.**

Output Sett	ings						
Embed PDF	I File Naming	🖄 Automation	🦻 User Interface	& Exempt	ed Extensions	Watermark	Security
Default Sec	urity Profile						
Internals C	Only			~			
Available F	Profiles						
Internals O Public Key	Dnly				📝 Edi	t	
rubicitey					NEW Nev	N	
					🗶 Dele	te	

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

Password Security	×
PDF Security Settings Document Open Require a password to open the document	
Document Open Password: lucy123	
Permissions	
Restrict Editing and Printing of the PDF	
Allow Printing	

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.

Password Security	Х
PDF Security Settings	
Load from Template V 🗐 📼	
Document Open	
Require a password to open the document	
Document Open Password: lucy123	
This password will be required to open the PDF	
Permissions	
Restrict Editing and Printing of the PDF	
Allow Printing	
	ран. 4

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.

🧧 📄 🗄 🖶 🐔 🤈 🕂 🎝 🕫	Foxit Reader		83
File Hon Con Viev Forr Prot Sha Con He	elç Extr 🙇 Find	🔎 🕲 • 🔍 🗅	- 0 -
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Password Project Brief.pdf [*] is password password to open this docu Enter Password:		er a	

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.

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 Accessbility
Allow Filling of form fields
Change Permissions Password: master123
It is password will be required to change Permission Settings
ورود المجار المناجب المرور المحصول المجرور المحرور المحرور المحرور المحاجر والمح

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

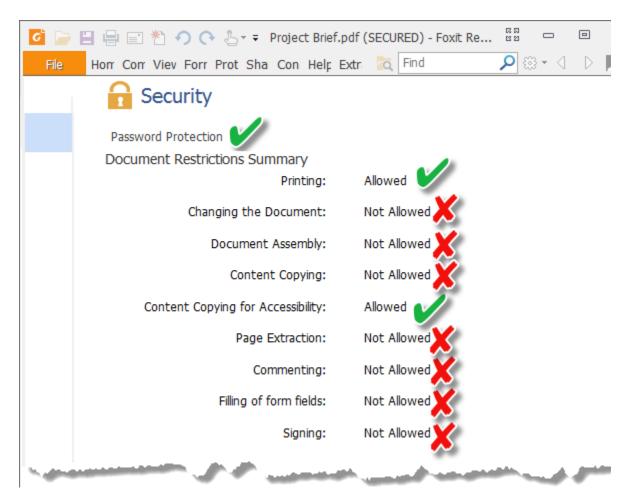
While people may be able to view it, ensure that viewing is all they can do with it. For example, you could disable copying of text and images but enable printing, helpful if you want to distribute a PDF but want to discourage duplicating parts of your propriety work.

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'

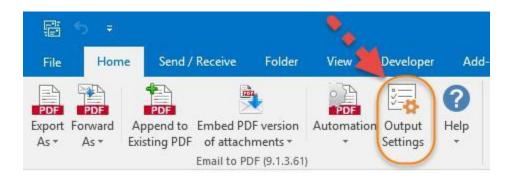
Change Permissions Password - You can set this password to keep other people from printing, copying or modifying text, adding or deleting pages in your PDF files. (Also known as 'Owner Password')

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

I Output Settings
🛛 Attachments to PDF Embed PDF 🗉 File Naming & Automation 🎬 UI 🙆 Exemptions 📓 Watermark 🔒 Security Others
* 🗹 Export attachments as PDF 🛕
For Quick Export button Used in Quick Export
O Output to individual PDF
B O Merge all attachments to a single PDF
Merge attachments & email to a single PDF
For automatically exported Emails Used in Auto PDF Export
O Output to individual PDF
O Merge all attachments to a single PDF
○ Merge attachments & email to a single PDF
□ Put the email at the end D □ Output to a subfolder E
Exclude Compressed Zip File Exclude Email MSG File G Exclude Email EML File
🗹 Ignore Styles in HTML attachments 👔 🕢 🗹 Use Original Size for Image files 😈
Exclude attachment PDFs when forwarding Ignore Password Prompt on PDF attachments
* Only those attachments with the following extensions: zip, msg, eml, pdf, docx, docm, doc, htm, html, mht, mhtml, dotx, dotm, dot, 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, cut, doc, 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

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.



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.

File	Home	Send / Receive	Folder	View	Help	Email to PDF	Q	Tell me what you want	to do	
			<u>.</u>		PDF	Default Wat	ermark	Company Name 2	Ŧ	?
PDF	PDF	PDF				Default Secu	irity	Internals Only	Ŧ	
Export As ▼	Forward As	Append to Embed Existing PDF of att	I PDF version achments ∗	Output Settings	Automatio *	email Page S	bize	Letter	Ŧ	Help •
		•		Email to	D PDF (10.0.1	109.0)				



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*').

^{II} 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, 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, 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

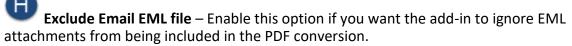
If the attachment is a PDF file, then it is directly outputted or merged along with the other attachment formats.

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.

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.

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

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





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.



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



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.



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 PDF	Embed PDF	File Naming	Automation	User Interface	Others
Embed PDF version	ofattachmer	nts to Email			
* How do you like	e the PDF ver	sions of the a	ttachments to	o be embedded t	o the original email?
O Convert each	attachment	to separate F	DE		
		State of Automatic Value Pro-			
Merge all att	achments to	a single PDF			
O Merge attack	nments & ema	ail to a single	PDF		
Flag the email it	em () None	í.			
	Comp	oleted			
	() Mark	ed			

docx, docm, doc, htm, html, mht, mhtml, dotx, dotm, dot, 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, 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, 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, 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

SECTION 3: File Naming & Automation

Attachments to PDF	Embed	PDF F	File Naming	Automation	User Inter	face	Others			
E-Mail 1st part of the nam	ie	Separa	tor	2nd part of	f the name		Separator		3rd part of the name	
Subject	~	Under	Score ()	ReceivedT	ime	~	Under Score ()	~	SenderName	~
Appointment 1st part of the nam	ie	Separa	tor	2nd part of	f th <mark>e n</mark> ame		Separator		3rd part of the name	
Subject	~	Under	Score ()	Duration		~	None	~		~
Task 1st part of the nam	ie	Separa	tor	2nd part of	f the name		Separator		3rd part of the name	
Subject	~	Under	Score ()	DueDate	8	~	None	\sim		V

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).

→ → ↑ 🖆 > BYTESTATION > Documents →	Ū	Search Documents	í.	\$
rganize 👻 New folder			EEE 💌	(
A Name		Date modified	Туре	
Declara Camtasia Studio		12/5/2013 10:53 PM	File folder	
the auto-processed Outlook items as		013 5:38 PM	File folder	
None		(2015 11:55 PM	File folder	
○ Completed		2014 3:27 PM	File folder	
O Marked		2017 12:33 PM	File folder	
		2014 10:17 AM	File folder	
Document Exporter 🗸 🧹				3
File name: Problem with my Printer!_01.19.2017.12.31.25	5_Fran	icas F.pdf		
Save as type: Adobe Portable (*.pdf)		1. A.	r Name	2

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.

		34 - 34			
	AW: several Helpdesks i	Thu 1/19/2017 3:56 PM	228 KB		
Q.	RE: Welcome to Issue Tr	Thu 1/19/2017 12:41 PM	108 KB	Ū	~
Û	Problem with my Printer!	Thu 1/19/2017 12:31 PM	159 KB		\checkmark
	AssistMyTeam : Thank yo	Thu 1/19/2017 7:05 AM	53 KB	1	

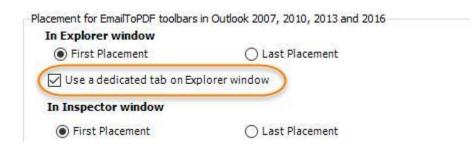
SECTION 4: User Interface (UI)

ttachments to PDF	Embed PDF	File Naming	Automation	User Interface	Others	
Placement for Emai	IToPDF toolba	rs in Outlook	2007, 2010, 2	013 and 2016		
In Explorer w	indow					
First Place	ement	C) Last Placem	ient		
🗌 Use a dedio	ated tab on f	Explorer wind	low			
In Inspector	window					
First Placement O Last Placement						
🗌 Use a dedio	ated tab on I	nspecto <mark>r</mark> win	dow			
Disable toolba	ars in					
Appointm	ent] Task			
Choose a lange	uage					
English			~			

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.

Ē	Ema	il to PD	F tool	bar in	Outlo	ok - H	ome Ta	b Ou	tlook toolbar
File	Home	e 🦊 Send /	Receive	Folder	View	Developer	Add-ins	🖓 Tell	me what you want to do
PDF Export	PDF Forward	PDF Append to			PDF Automation	1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1	Help N	ew New	Reply Reply Forward
As ∗	As ▼	Existing PDF	of attachn Email to PDF		*	Settings	▼ Er	nail Items * New	All Respond

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.

F	5 ₹	En	nail to	PDF t	oolba	in its	s own	dedicat	ed tab
File	Ema	il to PDF 差	Home	Send / Red	eive l	Folder	View	Developer	Add-ins
PDF	PDF	PDF		a	PDF		?		
	Forward As •	100 D 00 000000000000000000000000000000		PDF version chments *	Automati	on Outpu Settin			
				PDF (9.1.3.61)			-		

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

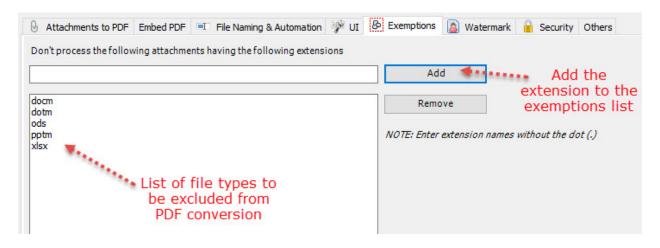
hoose a language	
German	

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

F	5	i i ⊊								
Fil	e	Email to PDF	Hom	ie:	Send / Receive	Folder	View	Developer	Add-ins	♀ Tell n
Ехро			Zu einer		ndenen Embed PD		Automatis	ierung Ausgal		n. Hilfe
al	Adol	als * be Portable (*.pd		inzufü S	gen von An Speichern im PDF.		*			*
Æ		(*.xps)			Fügen Sie alle Anh	-			ien.	
		d 2007-2016 (*.do d 93-2003 (*.doc)		Alle Anhänge in die PDF-Datei einbetten.						RI
	Web	Web-archive (*.mht) Image: Transcript of 24-Jan-2017 9:40:00 AM. Visitor: Vikranth. Operator: Assist						r: Assist Tu		
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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, 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, 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.

1	😺 Output Settings	
	Attachments to PDF Embed PDF File Naming & Automation PUI Default Watermark Profile Default or Applied profile	🕑 Exemptions 📓 Watermark 🎴 Security Others
	Company Name 2 Available Profiles	Edit the profile
	Company Logo Watermark Company Name 2 Company Name Watermark Profile 1 Available profiles	☑ Edit Remove the profile ☑ Delete permanently

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.

Text as Watermark	[
	ASSISTMYTEAM								
			Enter your						
		company name or brand							
	here								
			nere						
Font:	Helvetica		~ B /	Size: 88	~				
Fore Color:									
Rotation:	•45	○ None	○ 45	◯ Custom					
Opacity:			9 🗸						

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.

File Name	D:\AssistMyTeam\www\images\help_banner2.png	e 1
(Watermark image will be aligned in the center of eac	h page

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.

3	🖉 Output Settings							
	0						0	
	Attachments to PDF	Embed PDF	💷 File Naming & Automation	🌮 UI 🛛 🖇	き Exemptions	🚨 Watermark	Security	Others
	Default Security Profile		Default or Ap	plied p	rofile			
	Internals Only			~				
					1	Edi	t the pro	file
	Available Profiles							
	Internals Only				📝 Edit	🔜 📩 Crea	ite new p	rofile
	Private Team							
	Profile1				NEW New	Re Re	emove the	e
	Public Key 🛛 🔨				uso new		profile	
					Delet		rmanentl	v
	Availabl	e profile	S		🗙 Delet	e 🖛 pe	manenti	У
		-						

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.

Password Security X						
PDF Security Settings						
Load Profile 🗸 🗐 🔛						
Document Open Require a password to open the document						
Document Open Password: 123						
This password will be required to open the PDF						
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 Accessbility						
Allow Filling of form fields						
Change Permissions Password:						
This password will be required to change Permission Settings						
Continue Cancel						

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 Accessbility					
Allow Filling of form fields					
Change Permissions Password: 456					
(1) 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 addin 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.

	5 ₹							1	
File	Home	Send / Receive	Folder	View	Help	🔉 Tell me what you	want to do		
			b .		PDF	Default Watermark	Company Name 2	1-	0
PDF	PDF Forward As *	PDF	mbed PDF version Outp	Sector	it Automation	Default Security	Internals Only		Help
				Settings		Email Page Size	Letter	*	
				Email to	PDF (10.0.1)	08.0)			

SECTION 8: Others

tachments to PDF	Embed PDF	File Naming	Automation	User Interface	Others				
PDF Optimization									
Optimize for	Quality		O Optimize for Publishing						
Larger file s	ize		Smaller file size						
When appending	to existing PDI	-							
Output to th	e existing PD	F	Output a new file						
Attachments Out	out								
Output attack	hments to a si	ubfolder							
Exclude i	nline images								
Exclude h	nidden attach	ments							
Overwrite	e existing file	s (if any)							
Exclude a	attachments o	utput on auto	omation						
Page Setup									
Paper Size									
A4			~						
Orientation									
Portrait									
○ Landscap	ne.								

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

- 🕑 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* <u>only</u>
- *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 <u>AssistMyTeam Support and Maintenance Contract</u> MSI
- *installer* for enterprise wide deployment available upon request

17. Important Links

- <u>Email to PDF Home page</u> Go to the website of **Email to PDF for Outlook**.
- <u>Video Tutorials</u>

Quickly learn how to use **Email to PDF for Outlook** and generate PDF/XPS/DOC/MHT documents from your emails!

- <u>What is Adobe Portable Document Format</u> (PDF)? Know more about Adobe and PDF.
- <u>XML Paper Specification: Overview.</u> 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.

- <u>About single file Web pages (MHTML)</u>
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