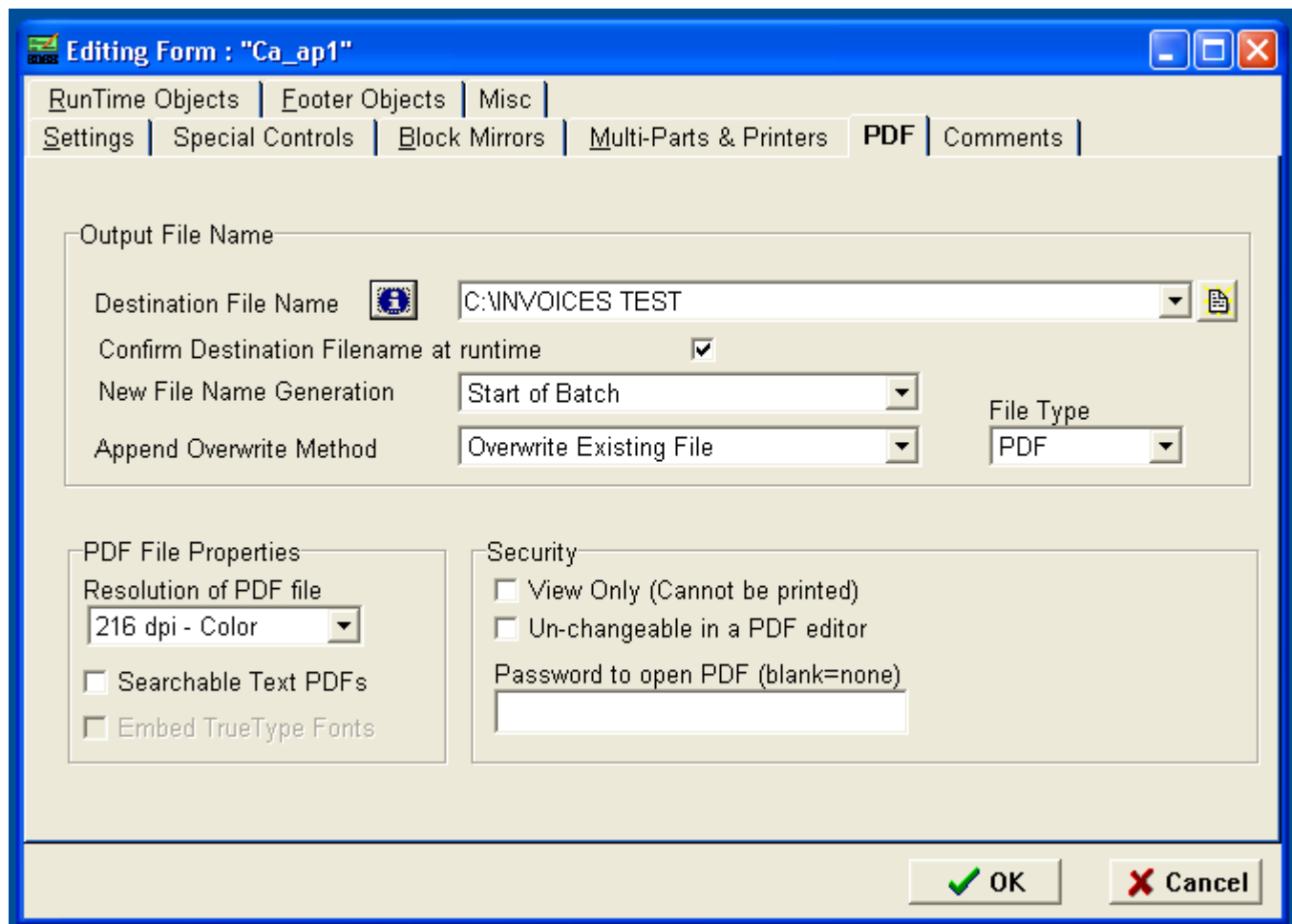# Wellspring Software

Training Notes

Archiving a PDF copy of your document with PrintBoss is easily done by setting up an additional copy of your document which will 'print' as a PDF copy and be filed automatically anywhere on your system.

SETUP IN PRINTBOSS

1. Open the PrintBoss Master Application.
2. Click on the **Edit** menu and select **Form Files**.
3. Highlight the appropriate form and click the **Editor** button.
4. Increase the number of Copies by 1 on the **Settings** tab.
5. Click on the **Multi-Parts & Printers** tab and select **PDF** as the **Destination** for the new copy.
6. Click back on the **Settings** tab and note the new **PDF** tab.
7. Click on the **PDF** tab.

Editing Form : "Ca_ap1"

RunTime Objects | Footer Objects | Misc
Settings | Special Controls | Block Mirrors | Multi-Parts & Printers | **PDF** | Comments

Output File Name

Destination File Name   `C:\INVOICES TEST`

Confirm Destination Filename at runtime   ☑

New File Name Generation   `Start of Batch`

Append Overwrite Method   `Overwrite Existing File`   File Type   `PDF`

PDF File Properties

Resolution of PDF file
`216 dpi - Color`

☐ Searchable Text PDFs

☐ Embed TrueType Fonts

Security

☐ View Only (Cannot be printed)

☐ Un-changeable in a PDF editor

Password to open PDF (blank=none)

✔ OK   ✘ Cancel

8. Enter a **Destination File Name**. Enter a path and filename to store the PDF file.

    Example: C:\PDF\Invoices\inv

    Note: Additional File Name Functionality with the Enterprise Edition of PrintBoss:

    The Enterprise version of PrintBoss allows macro characters to be used in the file name to create a dynamic file name when a batch of checks is printed. Variables assigned in the form can be used as well.

    Click on the information button 🛈 to view instructions for creating dynamic file names. It is often helpful to include the date and time as part of the file name or path. Variables from the form can also be used, enabling values like Company Name or Invoice Number to be part of the file name or path. Counter characters may also be used at the end of a file name to dynamically increment a sequential number.

    Examples:

    1) C:\PDF\Invoices\{YYYYMMDD}\{DocNo} will create a folder for each invoice by date.

    2) C:\Invoices\{DocRecip}\Inv{DocNo} will create a folder for each company with the invoice name such as "Inv10045.pdf".

    3) C:\Invoices\{DocRecip}\Inv{DocNo}-## will create the same as above, but puts a 00, 01, 02, etc. at the end for duplicate printings with the same document number (DocNo).

    4) C:\Invoices\{DocRecip}\{YYYY}\Inv{DocNo} will create the same as example 2, but also creates a subdirectory for each year.

    5) C:\Invoices\{CustID}\{YYYY}\Inv{DocNo} will create the same file as example 4, but uses a variable CustID that you create and capture.

    [Note: Please see Training Note*: PrintBoss Form Files* for additional information on adding captured variables*.*]

9. If **Confirm Destination Filename at runtime** is checked, the user will be provided with a pop up window displaying the current destination for the file. The prompt will allow the destination to be changed before printing the documents.

10. The option **New File Name Generation** determines *when* a new PDF file name is created. **Start of Batch** is available for all users and will create a new PDF file at the beginning of each batch.

    Options available with the Enterprise Edition of PrintBoss two additional options are available.

    a. **Each New Page** will create a new PDF file for each page*.*
    b. **Each New DocNo** will create a new PDF file for each new document number. This option assumes the form is utilizing the {DocNo} variable. [**Note: If using the Enterprise**

Edition of PrintBoss *and* have chosen to use variables in the File Name, you must set this option to 'Each New DocNo'.]

11. The options for **Append Overwrite Method** determine what to do with the new file relative to the existing files. Select the appropriate option to *Overwrite existing File* automatically, *Append to existing File* automatically, or prompt the user to choose Overwrite, Append, or Cancel. Note: the Append option is available for PDF and TIF files only.

12. The default **File Type** is PDF. However, Tiff, JPG, and BMP files can also be created. The File Properties section changes to display options for the chosen file type. The Append option is available for PDF and TIF files only.

13. **PDF File Properties**

    Resolution of PDF File - Choose the resolution of the PDF in DPI (Dots Per Inch). Higher DPI values will generate a larger PDF file. The best choice for most cases is 216 dpi – Color. This is true even if a document is in monochrome because shading and grayscale are rendered better.

    Searchable Text PDFs - Select this option to create a searchable PDF file.   PDF readers, such as the Adobe PDF Reader, will be able to search for specific text in this file.

    Embed True Type Fonts - Select this option to permanently embed TrueType Fonts into the PDF file. This increases the size of the file, but it maintains the look and size of the fonts. Otherwise, a substitute font may be used and the text could appear smaller. This option is only available when the Searchable Text PDFs option is selected.

    Security - PrintBoss Enterprise users may activate additional **Security** that is recognized by all PDF readers

    a. ***View Only -*** Select this option to only open and read PDF files. No printing.

    b. ***Un-changeable in a PDF editor -*** Select this option to prevent anyone from opening the file in a PDF Editor and making changes.

    c. ***Password to open PDF -*** Enter a password that must be used to open and read the PDF file. One password is assigned to all PDF files. No variables can be used here. A dynamic password may be assigned in the Form's Footer Objects section.

OPERATION

Once the PDF file is configured, it is treated as another printer.

Select the Multi-Parts & Printers tab in the Form Editor to set the Print Time to print Immediate or as a Batch.

If you have set the Print Time to Batch, click on the File menu, select Open Document Work Files and select the form name to print. Print the whole file or set a range in the Scope to print only part of the file.

The work file may also be used to reprint or test print portions of the file. Be sure to check **Allow Reprints** as well as the copy marked **PDF** when reprinting checks that were previously printed.

NOTE:
The **Printed** column in the Browse list of the work file indicates the status of the printed documents. PDF copies display the letter D (for pDf) when printing is successful. The capital D turns into a small "d" when the copy has been reprinted.

[Note: Please see Training Notes*: PrintBoss Form Files* for additional information*.*]