

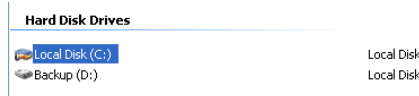
Saving PDF Files for Emailing

If you want to save PDF copies of invoices and estimates to be emailed out to customers, you will need to follow these instructions.

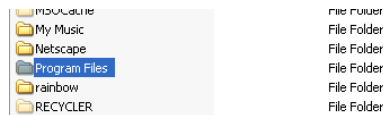
Designating a PDF Folder

Before you can save PDF files to email, you will need to tell **ADVANTAGE** where to save the PDF files.

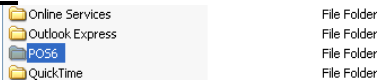
- ✚ Click on your  menu.
- ✚ Click .
- ✚ Double click on your local disk:



- ✚ Double click on **Program Files**:



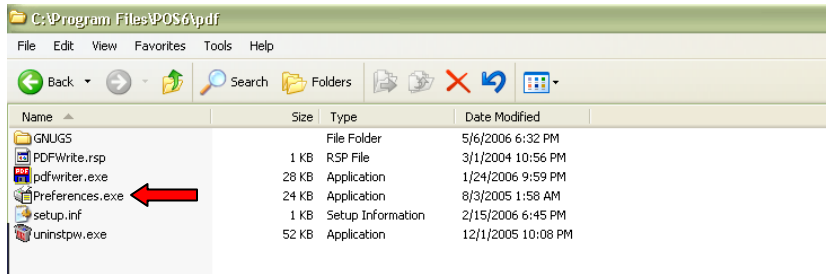
- ✚ Double click on **POS6**:



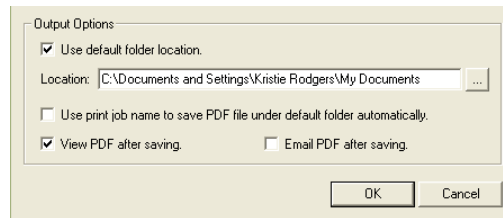
- ✚ Double click on the **PDF** folder:



- ✚ Double click on **Preferences.exe**:



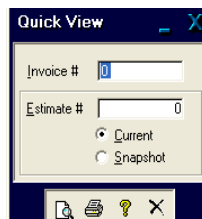
- ✚ The following window will appear:



- ✚ Use the (...) icon to select the directory you want PDF files to save to. Select the rest of your options (the recommended ones are selected above) then click **OK**.
- ✚ PDF files will now be saved (printed) to this location.

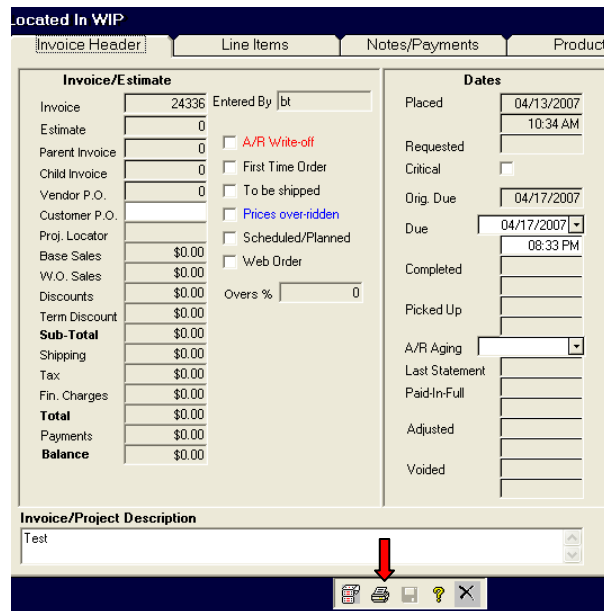
Saving the PDF File

- ✚ From the **ADVANTAGE** main menu, bring up your toolbar. You can do this two different ways: by clicking **Tools** then **Toolbar** or by moving your mouse to the far edges of your screen until it pops up.
- ✚ Click on **Quickview**. The following screen will appear:



- ✚ Type in the invoice or estimate number you wish to save as a PDF and hit enter.

- The invoice information will display. Click on the printer icon:



Located In WIP

Invoice Header | Line Items | Notes/Payments | Producti

Invoice/Estimate

Invoice: 24336 Entered By: |bt|

Estimate: 0

Parent Invoice: 0 A/R Write-off

Child Invoice: 0 First Time Order

Vendor P.O.: 0 To be shipped

Customer P.O.: Prices over-riden

Proj. Locator: Scheduled/Planned

Base Sales: \$0.00 Web Order

W.O. Sales: \$0.00

Discounts: \$0.00 Overs %: 0

Term Discount: \$0.00

Sub-Total: \$0.00

Shipping: \$0.00

Tax: \$0.00

Fin. Charges: \$0.00

Total: \$0.00

Payments: \$0.00

Balance: \$0.00

Dates

Placed: 04/13/2007 10:34 AM

Requested:

Critical:

Orig. Due: 04/17/2007

Due: 04/17/2007 08:33 PM

Completed:

Picked Up:

A/R Aging:

Last Statement:

Paid-In-Full:

Adjusted:

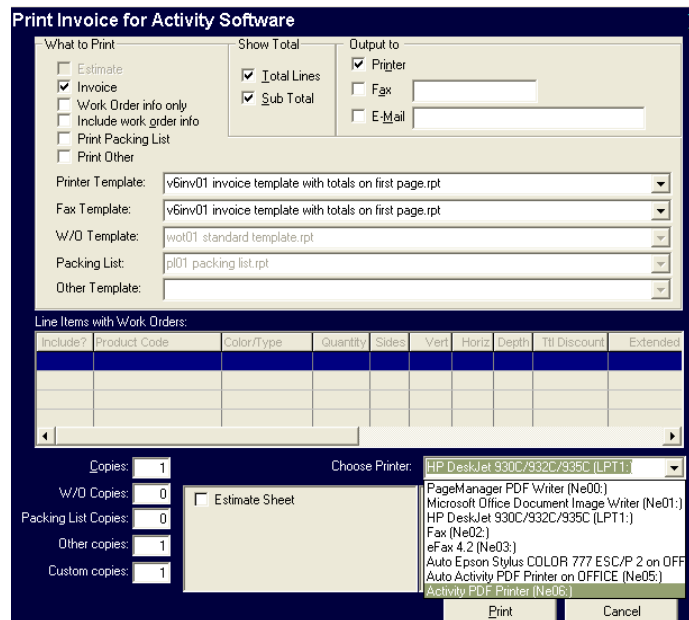
Voided:

Invoice/Project Description

Test

Printer icon highlighted with a red arrow.

- The following screen will display:



Print Invoice for Activity Software

What to Print:

Estimate

Invoice

Work Order info only

Include work order info

Print Packing List

Print Other

Show Total:

Total Lines

Sub Total

Output to:

Printer

Fax

E-Mail

Printer Template: v6inv01 invoice template with totals on first page.rpt

Fax Template: v6inv01 invoice template with totals on first page.rpt

W/O Template: wol01 standard template.rpt

Packing List: pl01 packing list.rpt

Other Template:

Line Items with Work Orders:

Include?	Product Code	Color/Type	Quantity	Sides	Vert	Horiz	Depth	Ttl Discount	Extended

Copies: 1

W/O Copies: 0

Packing List Copies: 0

Other copies: 1

Custom copies: 1

Estimate Sheet

Choose Printer: HP DeskJet 930C/932C/935C [LPT1] (selected)

PageManager PDF Writer [Ne00:]

Microsoft Office Document Image Writer [Ne01:]

HP DeskJet 930C/932C/935C [LPT1:]

Fax [Ne02:]

eFax 4.2 [Ne03:]

Auto Epson Stylus COLOR 777 ESC/P 2 on OFF

Auto Activity PDF Printer on OFFICE [Ne05:]

Activity PDF Printer [Ne06:]

Print Cancel

- Under **Choose Printer**, use the drop down menu to select the **Activity PDF Printer**.
- Click **Print**.



- ✚ Navigate to the folder in which you have designated PDF files to save.
- ✚ Locate the PDF that you just printed. It may be easiest to do this by choosing to sort the items in the folder by date.
- ✚ If you wish to save a copy of this PDF for a later date, you will need to right click on the PDF and rename it. Otherwise, the PDF will be overwritten each time you print a new one.