

Mortgage+Care

Creating a PDF attachment for a Form or Report

METHOD 1: Crystal Export

Crystal Reports has a built-in Adobe PDF creator, but it doesn't always work on all computers. Try this method first. If it doesn't work, go to method 2.

1. Open the desired form or report.
2. Click on the Envelope icon "Export". Choose **Format** of Acrobat Format (PDF) and **Destination** of Disk file. Click OK.
3. A dialog box should pop up allowing you to select a destination file name. Name the PDF file and save it somewhere where you can find it. (We prefer creating a C:\1 folder for these).
4. Once the file is saved, you can create an email and **Attach** the PDF file.

METHOD 2: PDF Print Driver

Download and install a PDF print driver. We like PDF995 because it's free (or \$10 to remove the nag screen).

1. Go to PDF995.COM and download both the **Pdf995 Print Driver** and the **Free Converter**. Install the programs. You should now have a new Printer called PDF995.
2. Open the desired form or report.
3. Click on the Printer Setup icon "Export". Select the Printer name PDF995. Click OK.
3. Now click Print then OK. A dialog box should pop up allowing you to select a destination file name. Name the PDF file and save it somewhere where you can find it. (We prefer creating a C:\1 folder for these).

Emailing a PDF

When viewing the PDF in Adobe Reader, Choose **Attach to Email..** from the File pull down menu. You can then paste the email address in the TO field by pressing **Ctrl + V**.

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