Initial Setup:

Create Folder....

Since pdf statements should be stored in a different folder than the regular utility billing files, create a new folder. The new folder should be on the same drive as the utility billing files. Name the folder something like "Util-pdfs" or "pdfs". In other words wherever the 'Util' folder is, make a new folder to store pdf files to be stored. Do not put spaces or slashes in the folder name. To add a new folder:

a. Open "Computer" (Windows 7) or "This PC" (Windows 8/10).

b. Open the drive where utility billing files are stored (ex: C drive or Server drive such as F, M, S, or Z).

c. If the "Util" is a sub-folder under another folder, open that folder.

d. Once you can see the folder named "Util" add a new folder by:

    Windows 7: select "New Folder" command (top of screen)

    Windows 8/10: Press Ctrl+Shift+N or right click and select - "New" - "Folder" .

    Type name of folder (ex: Util-pdfs) and press Enter. The new folder should now be displayed. Close all screens.

Change Options screens....

a. Open Utility Billing and choose "Options–Statements/Jrnl". Check the box "**Enable pdf Stmts**" (**important**: if you later decide to not print pdf statements simply uncheck this box).

b. To the right enter the Path (folder name) you just added so that the program will know where to store pdf stmts. Enter a slash in front and back of the folder name (ex: \Util-pdfs\ ). If the pdf folder is under another folder you will need to enter it also. For example if the pdf folder is under a folder named "Share" enter: \Share\Util-pdfs\

c. If the paper statement format you use is "Tri-fold PP" or "Laser Postcard" you'll need to enter the 'Payment Terms' (bottom of screen) and 'Due Info' (ex: AMOUNT DUE AFTER 10TH) that is pre-printed on your form. This is necessary since the pdf stmt is a blank form needing anything normally pre-printed to be defined. Select 'Colors' if you want different portions of the pdf stmt to have specific colors (you don't need a color printer to generate pdf stmts with colors). If you want "service dates" printed on the pdf statement (as opposed to having them print from the stmt message lines, check the box "Print Service Dates on trifold/pdf". Note: if you're currently using the Tri-fold Blank stmt format then this info should already be entered.

d. Click on **"Save"**. An error will display if the "Path" is not valid - correct or contact GFC Data for assistance.

e. If the paper statement format you use is "Tri-fold PP" or "Laser Postcard", open "Options–Postings/ Meter Rdgs" and confirm that there is a city name and address on the screen. The "Other" line can be a phone no. or email address. These fields are used to print your company info on the pdf statement. Click on "**Save**".

Specify which customers should get pdf statements...

a. Using the Customer Accts program, access any account who should get a pdf statement and click on Edit.

b. Change the "Stmt Cd" (upper right corner) from "Paper" to "pdf file".

c. Enter the customer's email address which is under the tab "Comments/Email/GPS".

d. Select "Save" (**important:** if you later decide to not print pdf stmts you do not have to change customer's Stmt Cd back to "Print" - just uncheck the "Enable pdf Stmts" in Options–Statements/Jrnl).

e. If you would like a list of pdf stmt accts, open Reports–Customers and click on "pdf File Only". If you also want the email address included, check the "Print Email Addr" box. Specify which Status you want (usually only Active)

f. If you would like to create a csv Email List file use "Other Functions–Email List". This file can be imported into Excel or Email/pdf software.

Create pdf statements.....

In the Statement/Jrnl program there is the option "Print pdf Stmts". Marking this option will process only those customers who have "pdf file" for the Stmt Cd. Pdf stmts don't print but are only stored in the folder set up for pdf stmts. Note: if you print statement totals after processing paper or pdf statements, the totals will only include customers that were included within that run. To get totals for all statements, print totals after using a routine that includes all customers such as Billing Journal, Print Nothing, or Update Cust Accts.

Emailing pdf statements....

The pdf stmts should be attached to an email and sent to the customer. The pdf stmts are stored in the folder you entered on the "Options" screen. The names of the pdf files will be the customer's acct# with ".pdf" attached (ex: 01-0100.pdf). You can open the files and view/print them using Adobe if desired. The emailing process can be manual with the user entering the customer's email address and attaching the customer's pdf file. Or email/pdf software can be purchased (ex: pdfMachine Merge - www.broadgun.com) which can automate the process.