Auto Print

User's Manual

Welcome

Thank you for choosing the Auto Print add-in, created by Sperry Software. This add-in allows you to print incoming and/or outgoing emails, set the criteria for determining what pages of which messages will be printed and where, and choose whether you want to have only the email message printed, only the attachment printed, or both.

This feature can be combined with Outlook's Rules Wizard so that only messages that flow into a particular Outlook folder are printed, and can be enormously powerful in the right circumstances, such as receiving faxes via email which also need to be printed.

To Print Incoming Email

Select a folder where your email arrives (for this example, we'll use the Inbox).

- Click Choose Folder, and choose the Inbox.

- A message comes up warning that you will have to restart Outlook in order to have the Inbox be monitored.

- For this example, we'll leave the Filter Rules at the default, "All Incoming Emails".

- In "What to Print", we will check the "Print the Email" checkbox.

- Click on Apply, Then OK, then restart Outlook.

- Send yourself a message or have someone send one to you, and it will be printed.

Configuring the Add-in

Once the installation is complete, you are ready to use Auto Print. When you open Outlook you will notice a new tab "Sperry Software" added to the Ribbon.
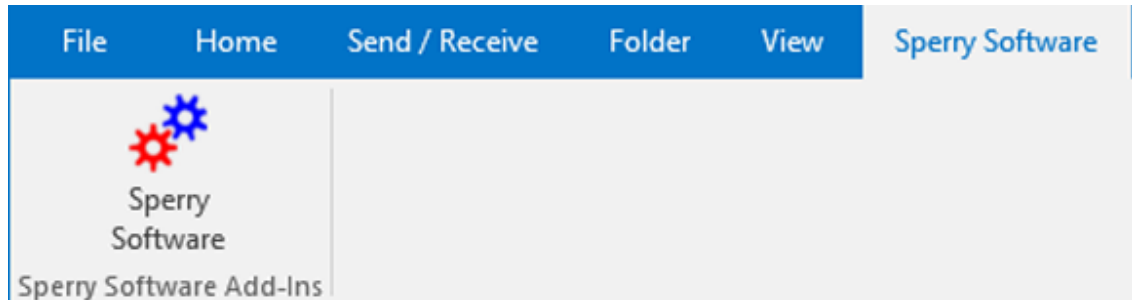
Clicking this button displays the Sperry Software Add-ins configuration screen. It is on this screen that settings are made to control the add-in's functionality.
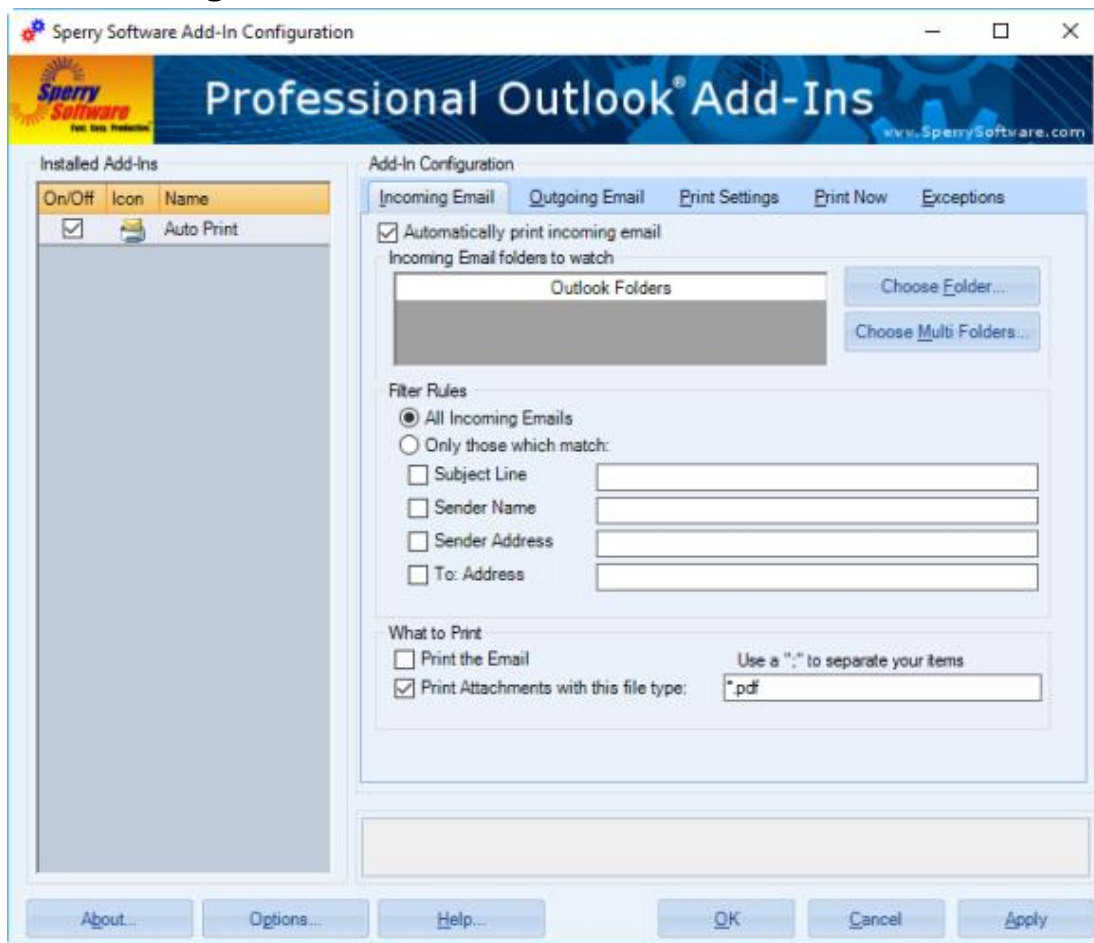
AutoPrint Incoming Email Tab

Figure 2 (Auto Print Incoming Email tab in Configuration window)

This area allows you to set the parameters for printing incoming (received) emails.

- "**Incoming Email folders to watch**" enables you to choose which Outlook email folders you want the add-in to monitor for printing. Emails that arrive in this folder will be printed, depending on the settings in the Filter Rules frame. The emails can arrive via the normal send/receive mechanism, or they can be pasted (or dragged/dropped) from another folder into this folder.

- The **Filter Rules** frame controls the criteria for determining which emails to print. You can choose to print "All incoming Emails" or "Only those which match" the criteria that you specify. You can choose to print only when the subject line matches, the sender's name matches, the sender's email address matches or the "To" address matches (in case you have more than one email address configured). Just like all the text fields in the Sperry Software line of add-ins, you can use wildcards for matching text. Wildcards are *not* case sensitive, and you can specify multiple criteria by separating the items with semicolons.

- The "**What to Print**" frame determines whether to print the email, the attachment, or both. When printing attachments you will need to specify the file type(s) that you want to print, to avoid print attempts on unprintable file types. Again, you can separate multiple file types with a semicolon, or print any attachments using a wildcard like "*.*".

If you are finished making changes to the Settings, click "**Apply**", then click "**OK**". If you have more changes to make, click the tab for the Settings you want to change.
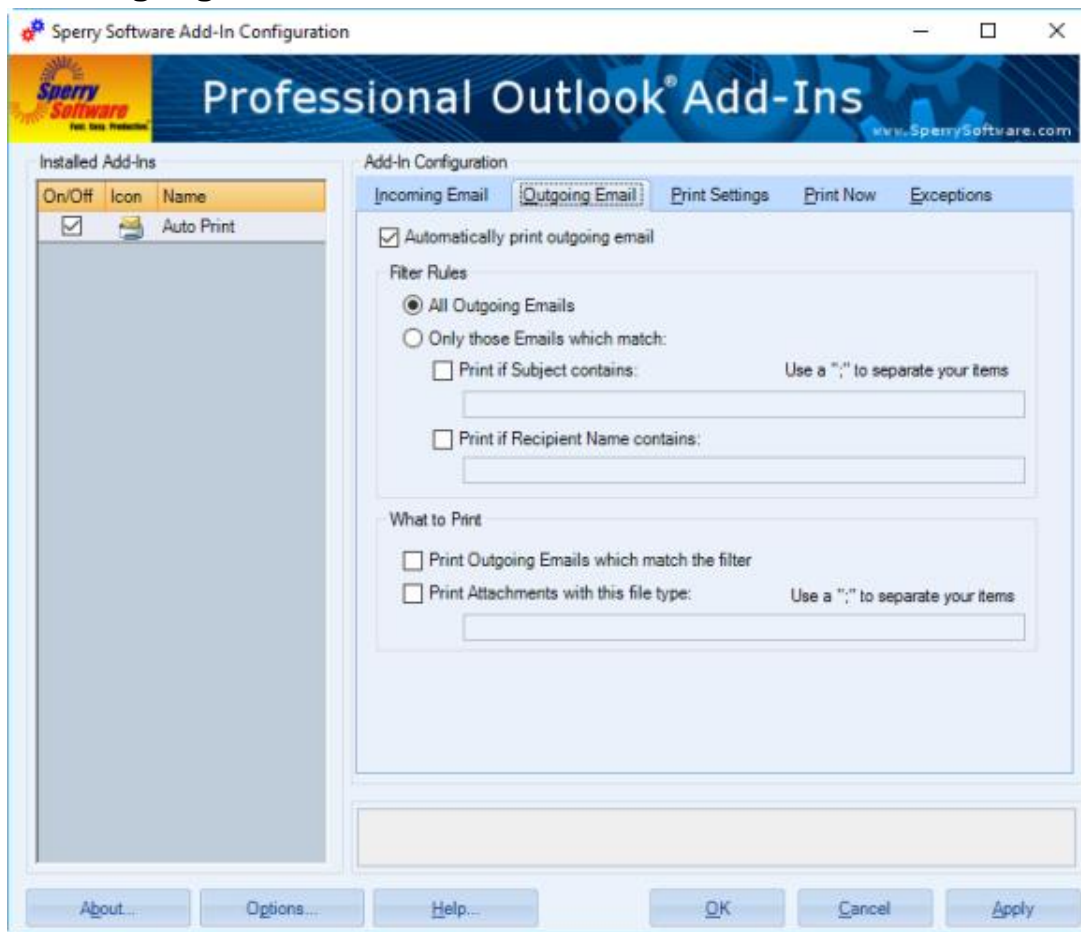
AutoPrint Outgoing Email Tab

Figure 3 (Auto Print Outgoing Email tab in Configuration window)

This tab allows you to set the parameters for printing outgoing (sent) emails. Most of the options are analogous in function to the incoming settings but apply to messages going out.

- The "**Automatically print outgoing email**" function will automatically print each message that is sent.

- **Filter Rules** are similar to those for incoming mail choices, such as All Outgoing Emails or Only those Emails which match the criteria that you specify. However, only the Subject and the Recipient Name are available.

- **What to Print** offers the same choices as incoming print emails or print attachments.

If you are finished making changes to the Settings, click "**Apply**", then click "**OK**". If you have more changes to make, click the tab for the Settings you want to change.

Tip: It may be easier to monitor the Sent Items folder on the *Incoming Email* tab rather than printing the items in this tab. This way, the Sent Items folder will contain the BCC recipients (and the complete header in general), assuming you have any BCC recipients that you want printed.
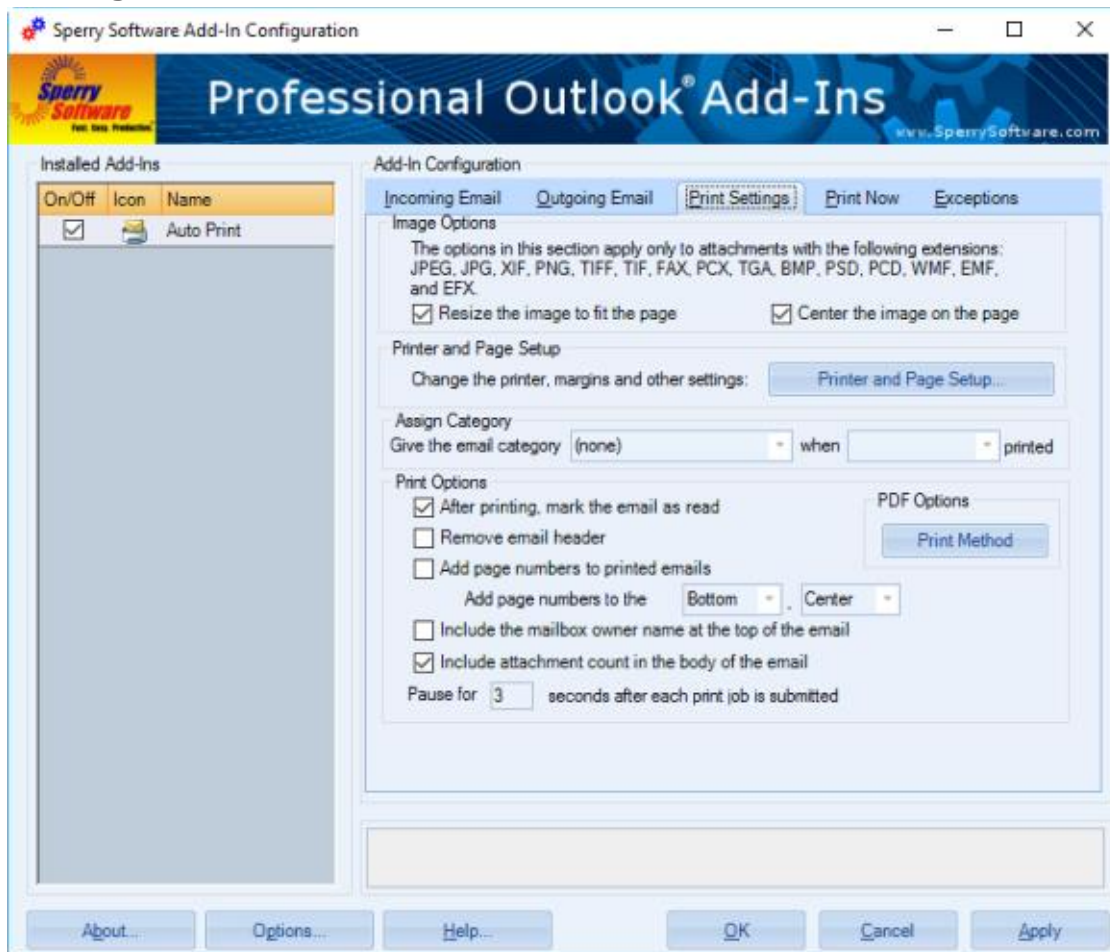
Print Settings Tab

- **Image Options -** Choose print and image options including Size to Fit and Collate. Resize the image to fit the page will expand or contact graphic images to exactly fit the page. Center the image will perform a centering operation on the page before it is printed. Note that these two options apply only to the file types listed (that is, most graphic type files).

- **Printer and Page Setup -** Printing can be sent to non default printers by specifying the location using the Printer and Page Setup button. **Emails can be sent to a different printer than the attachments, however all emails must go to the one printer selected here.** Likewise, attachments do not need to be printed to your default printer but all attachments will be sent to the printer selected here. When you click the Printer and Page Setup button, you will have the

option to define the Email Page and Email Printer Setup, as well as the Attachment Page and Attachment Printer Setup. In the Email Page Setup (and Page Setup) dialog box, note that you can select the margins, page orientation and other options. In the Email Printer Setup and Attachment Printer Setup dialog boxes, you can specify the printer to use, pages to be printed, number of copies, and whether or not they should be Collated. To print a complete copy of the document before the first page of the next copy is printed, select the Collate check box. If you prefer to print all copies of the first page and then print all copies of subsequent pages, clear (deselect) the Collate check box.

- **Assign Category** – Use this option to make each message printed using the Add-in with one of the Outlook categories. You can choose to have the messages marked once they have been successfully or unsuccessfully printed.

- **Print Options** - After printing the email, the add-in can optionally mark the email as read so that you know that it handled the email. This is the last operation that is performed by the Add-in so if there were any errors along the way, then the Add-in does not mark it as read. This way, you can quickly see which ones have been printed and which have not. You can choose to remove an email header or include page numbers in the generated email. Note that this option applies only to the emails and *not* to the attachments. There is also an option to print the number of attachments that were included in the email when it arrived (or when it was sent). This can be useful information because it goes into the body of the email (as opposed to the email header). You can also include the mailbox owner's name at the top of the email. Finally, the **Pause for 'N' Seconds After Each Print Job Is Submitted** option is useful when printing large attachments. This option basically forces the add-in to wait for a few seconds while the print job is fully queued into the printer, and is useful if there are large attachments being queued. A reasonable value is 5-10 seconds. It will need to be even higher if you continue to see that some attachments are printed twice.

- **PDF Options** - There are two ways the Add-in can print PDF attachments. The first method uses Adobe Reader and is made available in case the second method ("Use Built-In Routines") is not satisfactory. The default is to use the Built-In Routines since there is more control over the printing. By default, the Built-in Routines method reduces the PDF to fit the page.

If you are finished making changes to the Settings, click "**Apply**", then click "**OK**". If you have more changes to make, click the tab for the Settings you want to change.
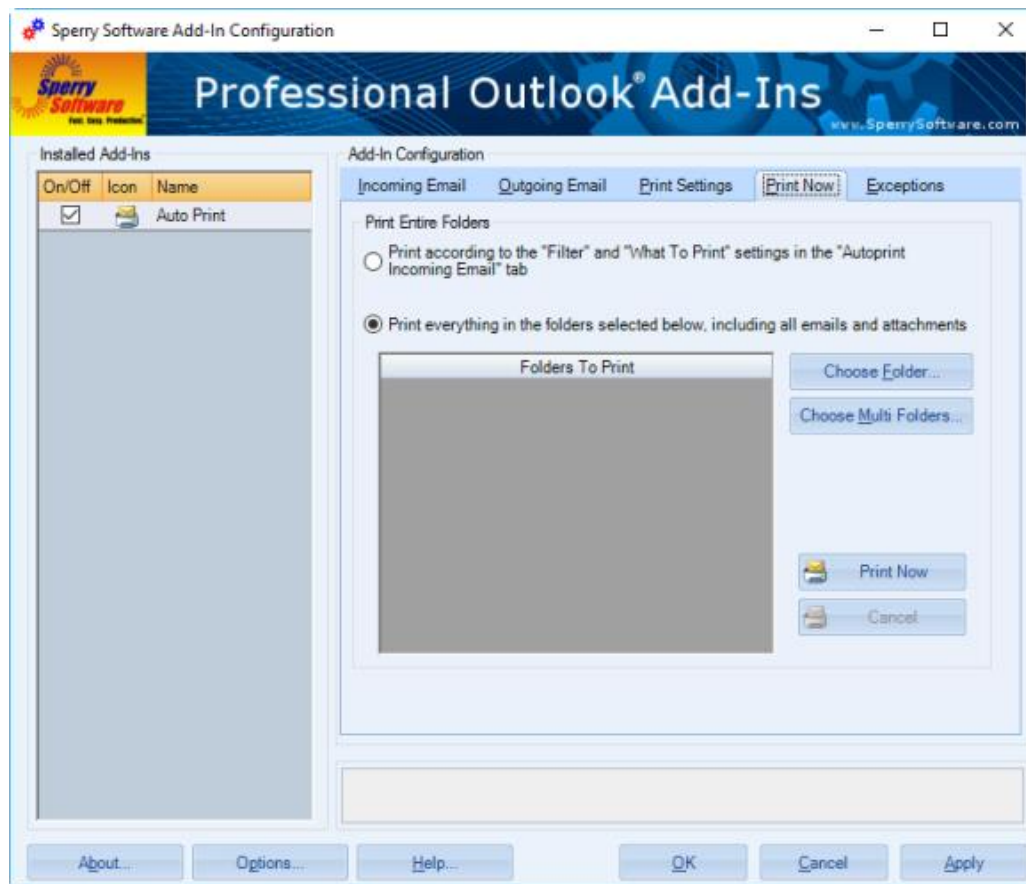
Print Now Tab

Figure 5 (Auto Print Print Now tab in Configuration window)

This area allows you to print emails and/or attachments that are already in the Outlook folders, that is, a batch print operation.

- In the **Folders to Print** section, you can determine what folders Auto Print will look for when searching for email to print.

- If you choose "**Print according to the 'Filter' and 'What To Print' settings**", Auto Print will only print email that meet the criteria determined in the "Filter" and "What to Print" settings found in the Auto Print Incoming Email" tab.

- If you choose "**Print Everything**", Auto Print will process all emails and attachments specified in the Folders to Print section.

- Once you are ready, clicking the **Print Now** button will begin the print process. A progress indicator will appear and update as the emails and/or attachments are printed.

If you are finished making changes to the Settings, click "**Apply**", then click "**OK**". If you have more changes to make, click the tab for the Settings you want to change.
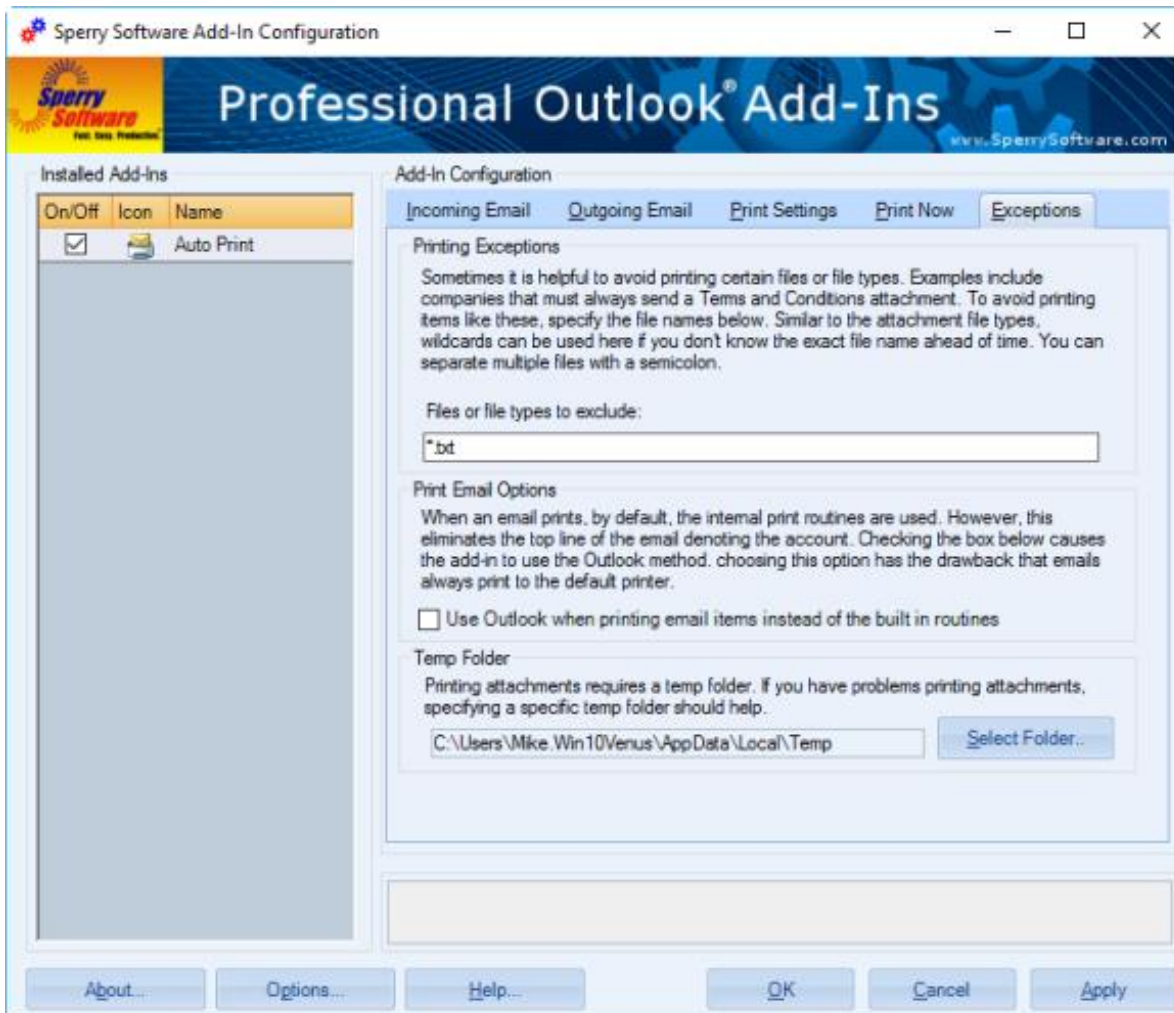
Exceptions Tab

Figure 6 (Auto Print Exceptions tab in Configuration window)

- **Printing Exceptions** - This tab allows you to do exclude certain file types. This can be useful if you consistently receive legal disclaimers that you do not need to print. In the sample above, no text files (*.txt) will be printed by the Add-in.

- **Print Email Options** - Normally, the Add-in uses its own routines to print the emails. This is advantageous for printing to non-default printers. However, for legal reasons it is sometimes imperative to have Outlook itself print the emails and to not modify the emails in any way. Selecting the Use Outlook when printing email items instead of the built-in routines checkbox will cause the Add-in to use Outlook when printing the emails. This option does not affect the printing of attachments, and checking it will result in the emails being printed to the default printer, as in Outlook. The ability to include page numbers and the attachment count will automatically be *disabled* if using this option.

- **Temp Folder** - This option allows you to specify a specific folder for the print temp files. This option is helpful if you encounter problems with the automatic printing feature.

If you are finished making changes to the Settings, click "**Apply**", then click "**OK**". If you have more changes to make, click the tab for the Settings you want to change.

Troubleshooting

Q. The "Sperry Software Add-ins" button is not visible.

A. There could be several reasons for this. See this article to figure out how to resolve this problem: https://sperrysoftware.freshdesk.com/solution/articles/5000626926-i-installed-the-add-in-but-i-can-t-see-it-in-outlook-

Q. The "Sperry Software Add-ins" button does not pull up the Configuration window.

A. Run the add-in Reset tool.

> The add-in reset tool can be downloaded from
> http://www.sperrysoftware.com/outlook/tools.asp

Q. How can we contact you for more help?

A. For help on more in-depth issues, check out our Knowledge Base especially the FAQ about how to enter a bug report.