

# PDFiler

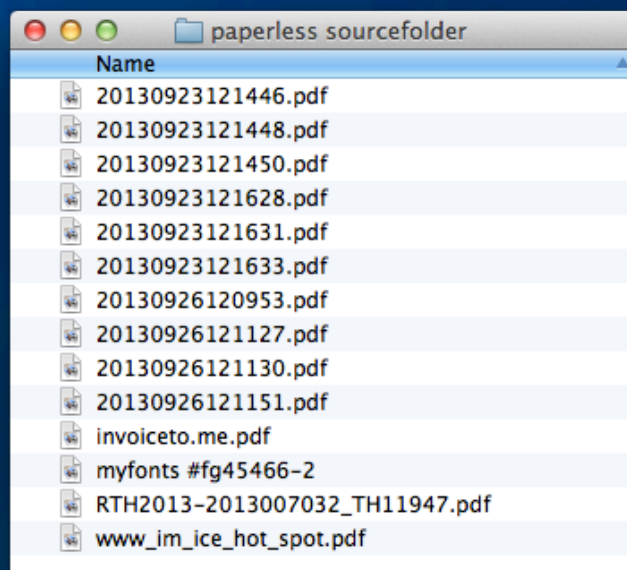


Finally going paperless gets easy

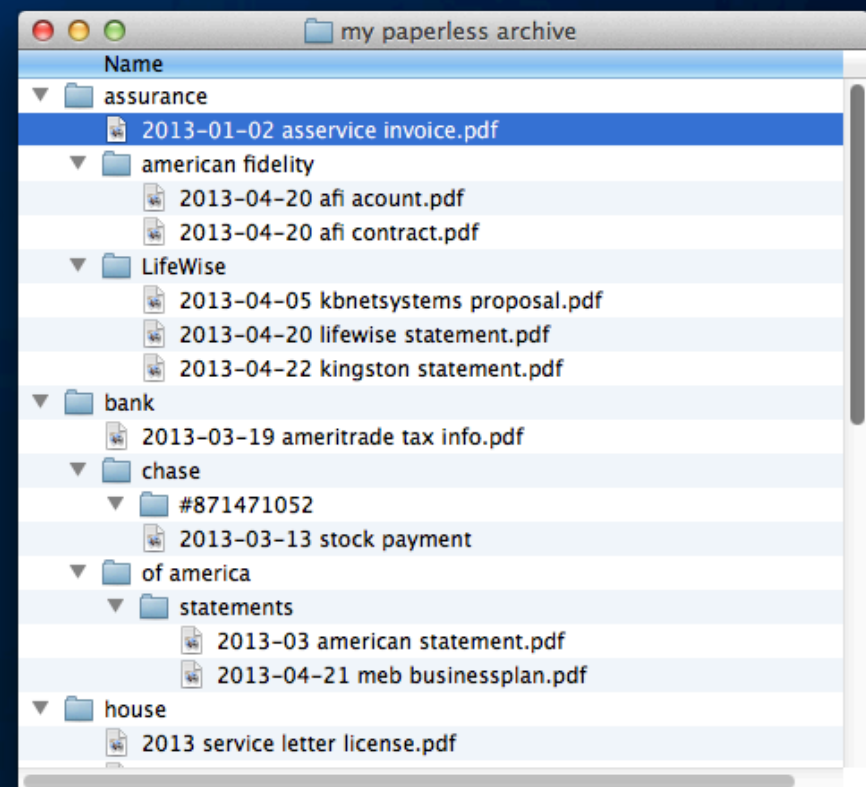
# PDFiler

## 5 simple steps

So you want this



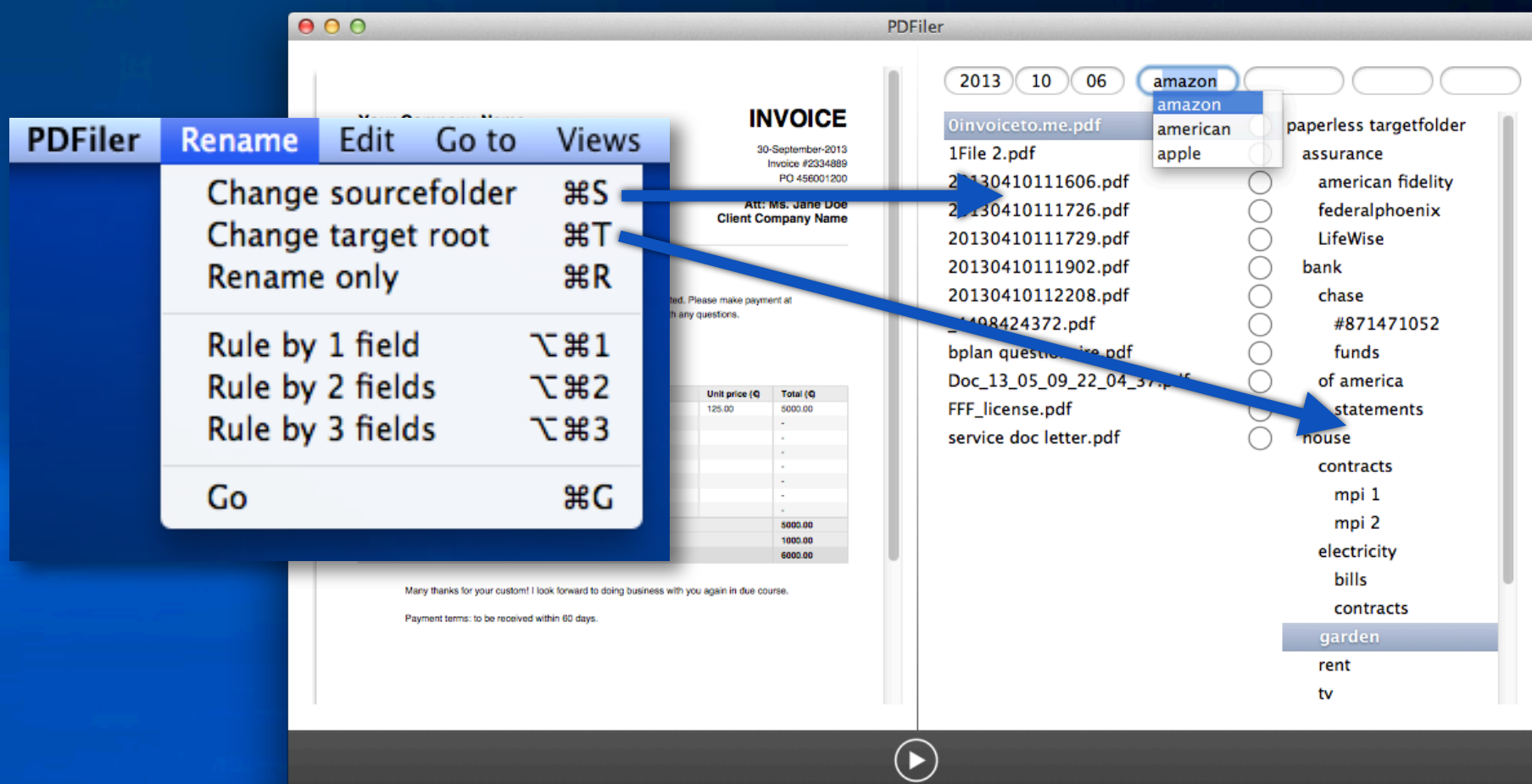
to be like this



1

Select the folder with the PDF files you want to process and the target folder which contains your paperless subfolder hierarchy.

The PDF files get listed in the middle table and the target folder hierarchy to the right of it.





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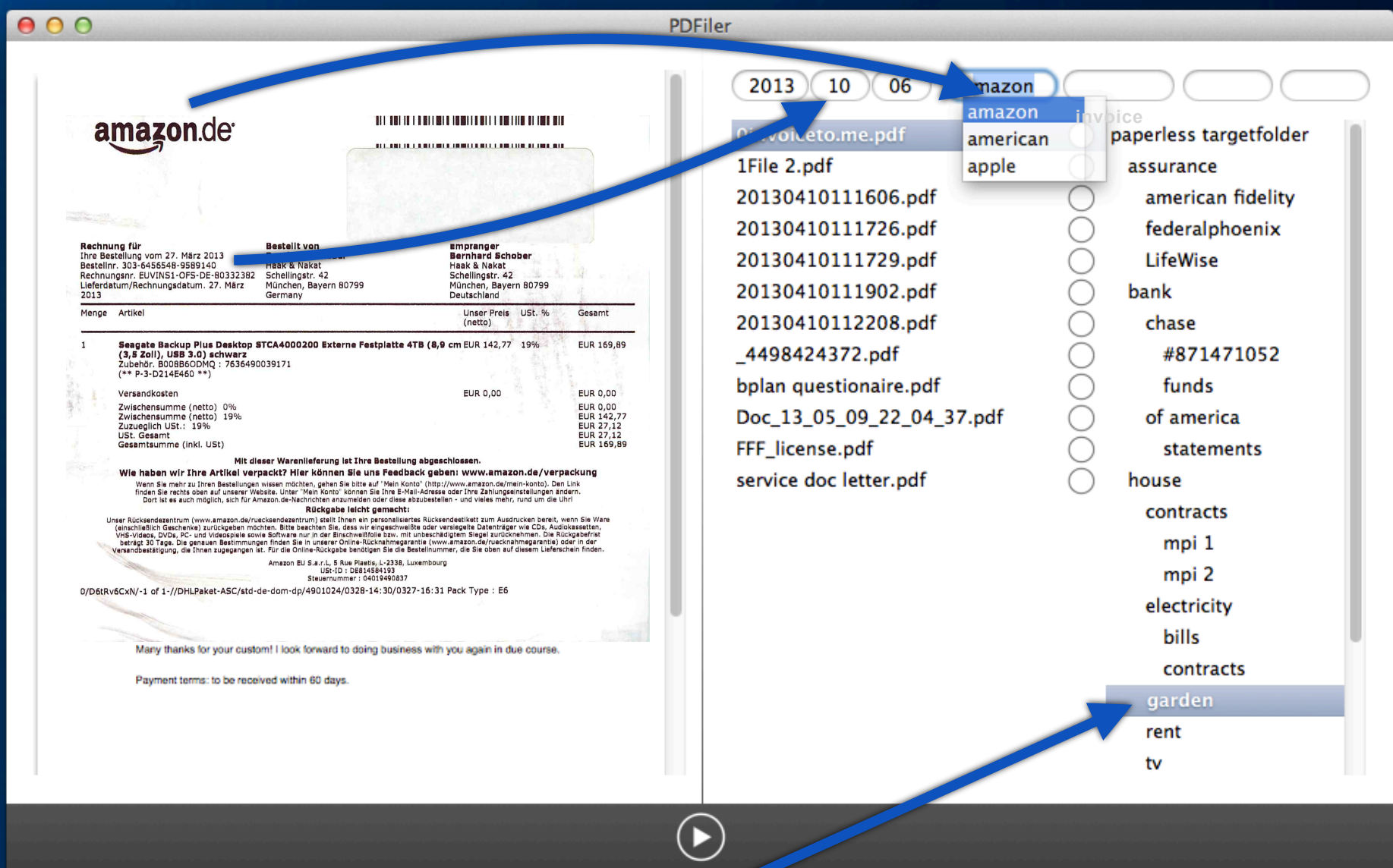
## 5 simple steps

2

On the left you see the first PDF of the source folder you selected.

On the top right enter the date and the name parts for the future name of this PDF file.

PDFiler helps you entering the parts by presenting you a menu of previously entered words to select from.



3

Select the target folder where you want the PDF to be moved to.

You have to do this only once, because PDFiler will remember that, like in this example, an invoice from amazon shall always be moved to the target folder you selected.

4

Hit enter.

PDFiler composes the new file name for the PDF and automatically steps forward to the next PDF file in the list. Repeat steps 2 to 4 for each file in your list.

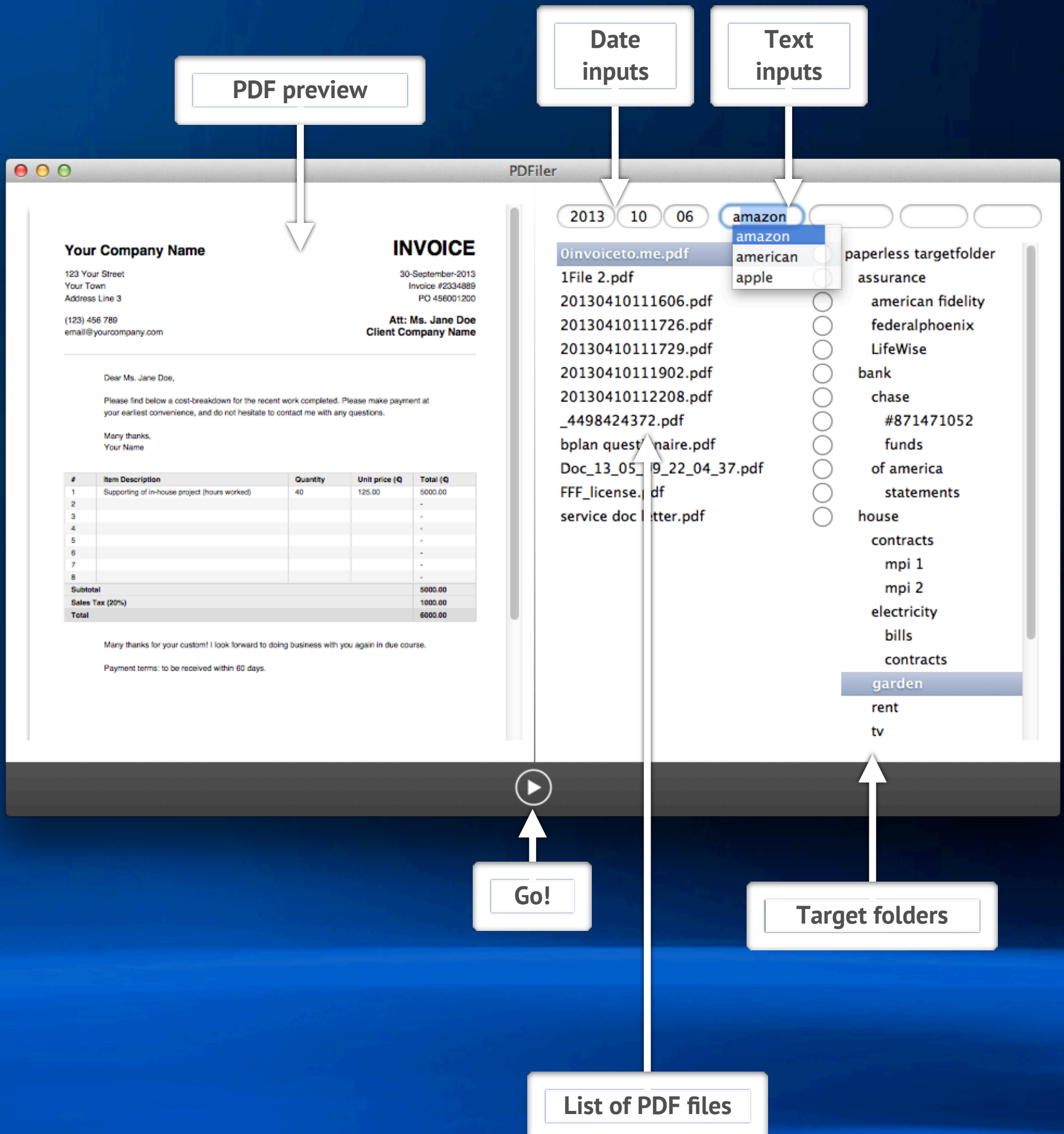
5

Go!

When you went through all the PDF files in the list click on the „play“ button on the bottom. PDFiler will then rename the files and move them to the folders you specified for each file.

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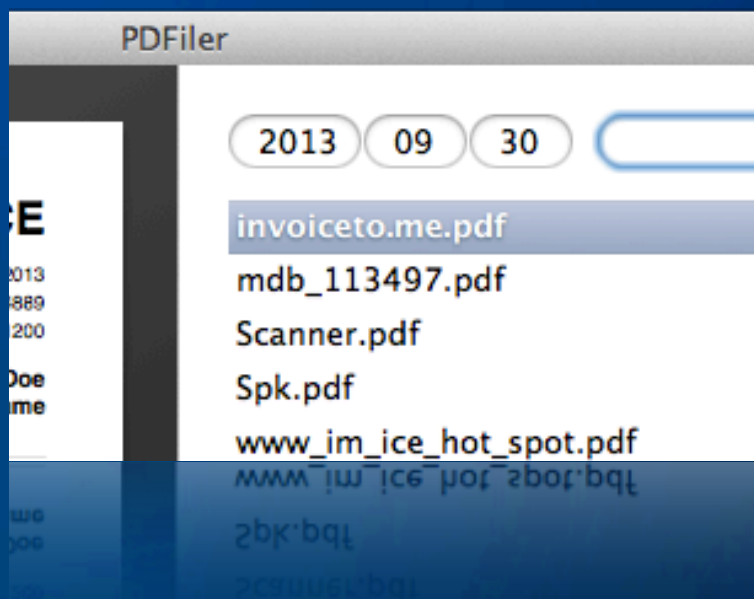
## Main window





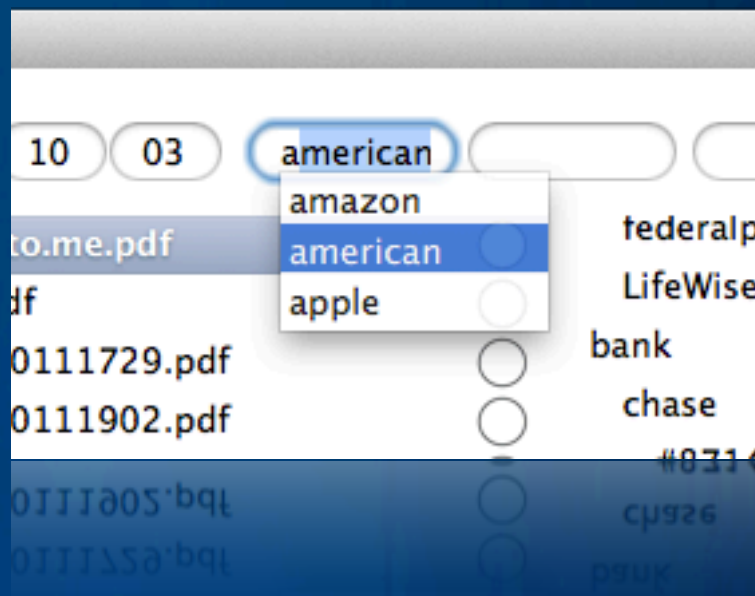
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## Define the target name for a pdf file



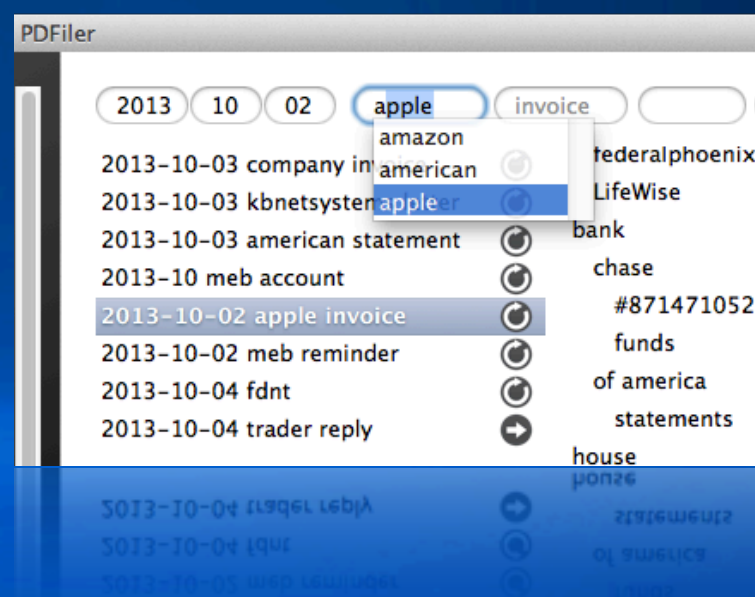
### Date inputs

Instead of just typing the year, month and day into these fields, you can increment or decrement the value of each field simply with the up or down arrow key.



### Text inputs

The text input fields remember every word you entered. So as soon as you start typing something you will get a list of possible matches to select from.



### Enter filename

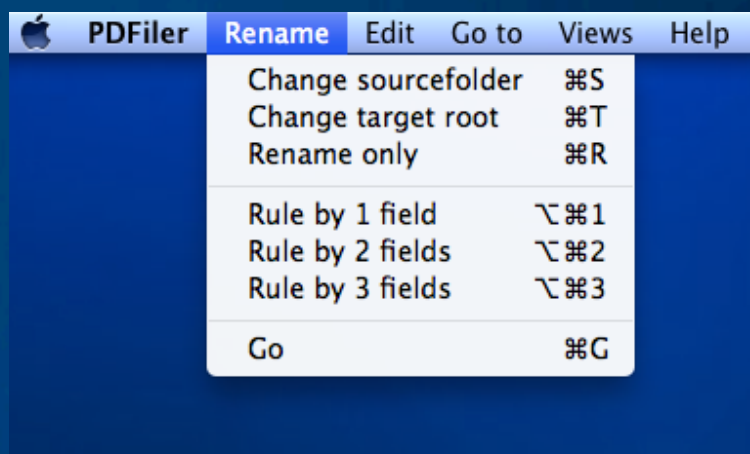
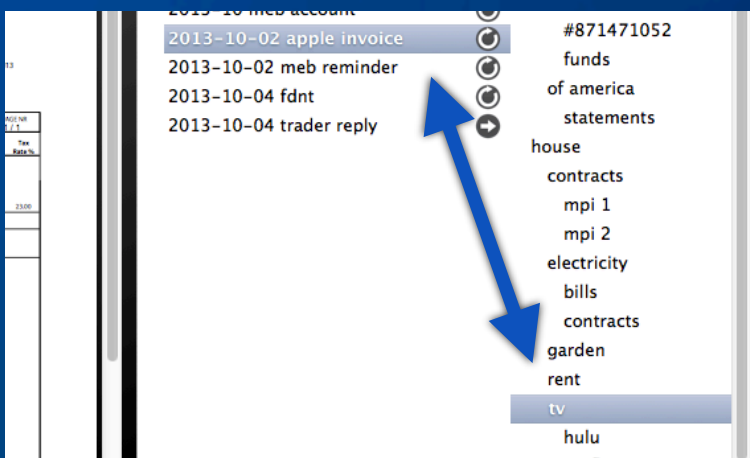
Finish defining the target name of a file by pressing enter. The future name of the file will be displayed in the list of pdfs as well as the corresponding target folder, where PDFiler will move the file once you press the „GO“-Button. The icon on the right of the filename tells you, if the target folder was chosen on the base of an existing rule or it was chosen manually by you.

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## Defining rules

### Select the target folder

Simply select a folder in the folder tree on the right to define this folder as the target folder for the selected file in the source list. The combination of the parts of the filename (the rule base) and the selected target folder makes up a rule. You can take a look at all the existing rules by going to the „Views“-menu and selecting „Rules“.



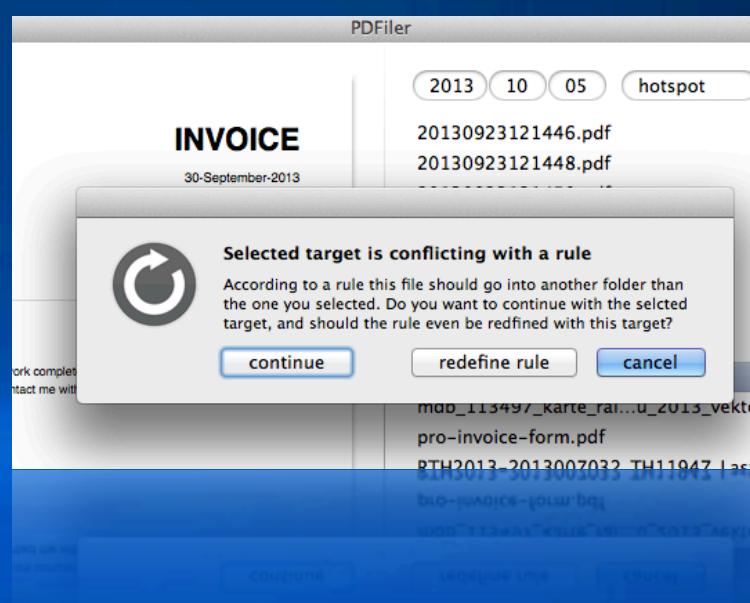
### Rule base

PDFiler takes at least the first text input field as the base for a rule. You can however change this for every file individually by selecting the corresponding item in the Rename-menu. Thus you can define a rule for „apple“ to go into one folder, and one for „apple invoice“ to go into another.

### Applying and changing rules

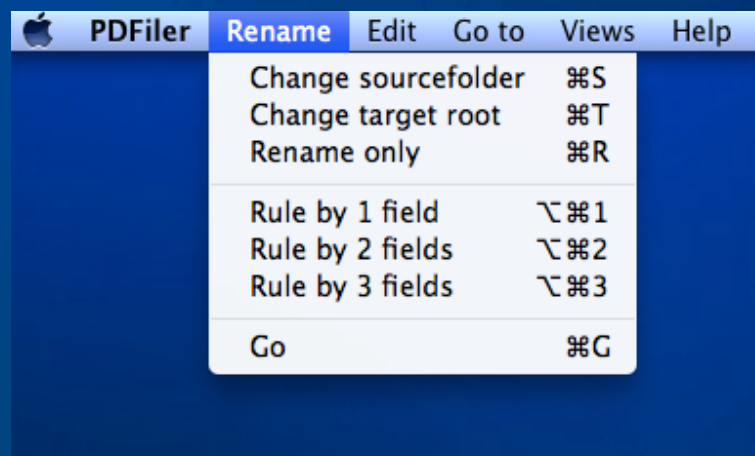
Once PDFiler recognizes a rule for a target file name, it automatically selects the corresponding target folder.

If you then choose another target folder instead, you will be asked, if the rule shall be changed accordingly, or if you want to override the rule only in this case.



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**Go!**



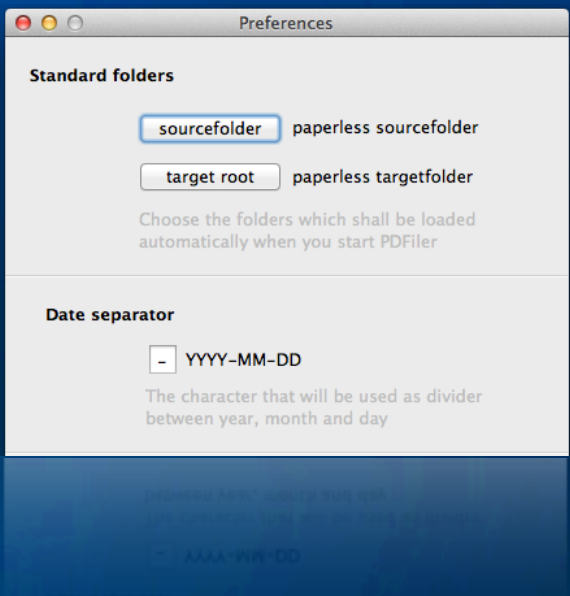
**Select Go from the Rename menu**

or just click on the „play“ button on the bottom of the main window to start the renaming process. PDFiler will rename every file and move it to the the folders you defined.



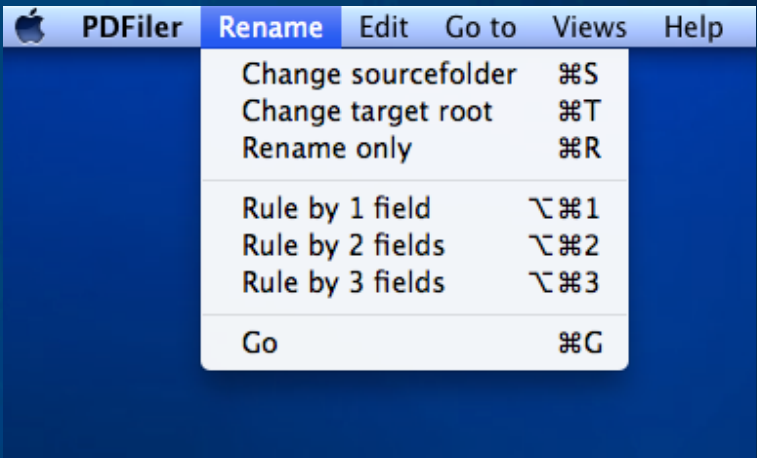
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## Preferences and exceptions



### Preference settings

In the preference settings you define the standard sourcefolder and target folder which get loaded automatically when you start up PDFiler. And you define which character will be used to concatenate the three date input fields. You can choose any character you like, but you probably want to go for something like - \_ . or even a blank.



### Change folders

You can change the current source or target folder anytime you want without changing the preference settings. Just select „Change sourcefolder“ or „Change target root“ to select another folder.



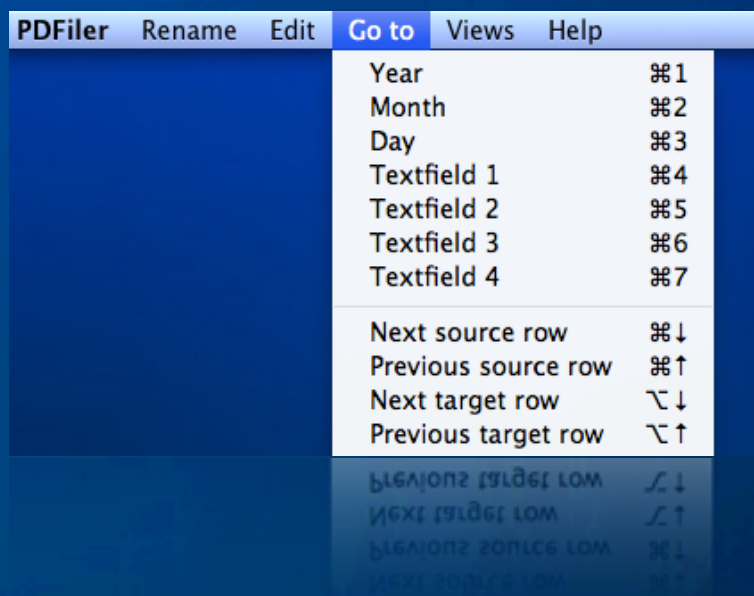
### Rename only

There may be times when you don't want to move files around but only to rename them. You can do that by choosing the „Rename only“ mode.



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## Other menu options



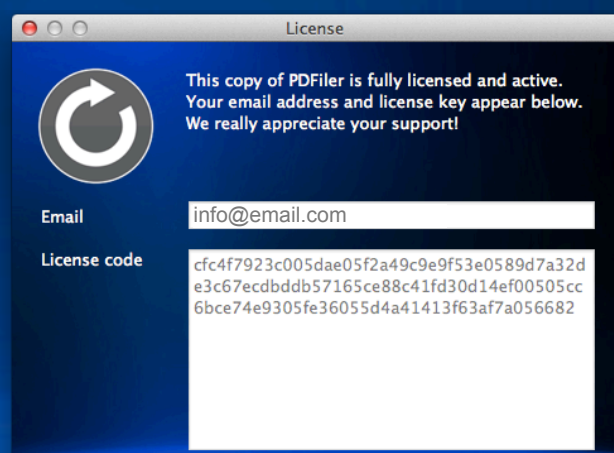
### Go to

You can select the different parts of the PDFiler main window manually by choosing the corresponding option of the „Go to“ menu. But you probably will never need to use it, because PDFiler does a pretty good job in predicting where you want to set your focus next and automatically sets it for you.



### Check for updates

PDFiler is evolving and there are a lot of ideas and enhancements we plan to implement. So, if you are not subscribed to our newsletter, you should check for an update every now and then.



### Register your copy

The trial version of PDFiler will insert the word „DEMO“ in every file name you create working with it.

If you buy PDFiler you will get an email with your license code, which consist of an awful lot of characters. Just copy this code and paste it into the appropriate field to remove the DEMO mode.

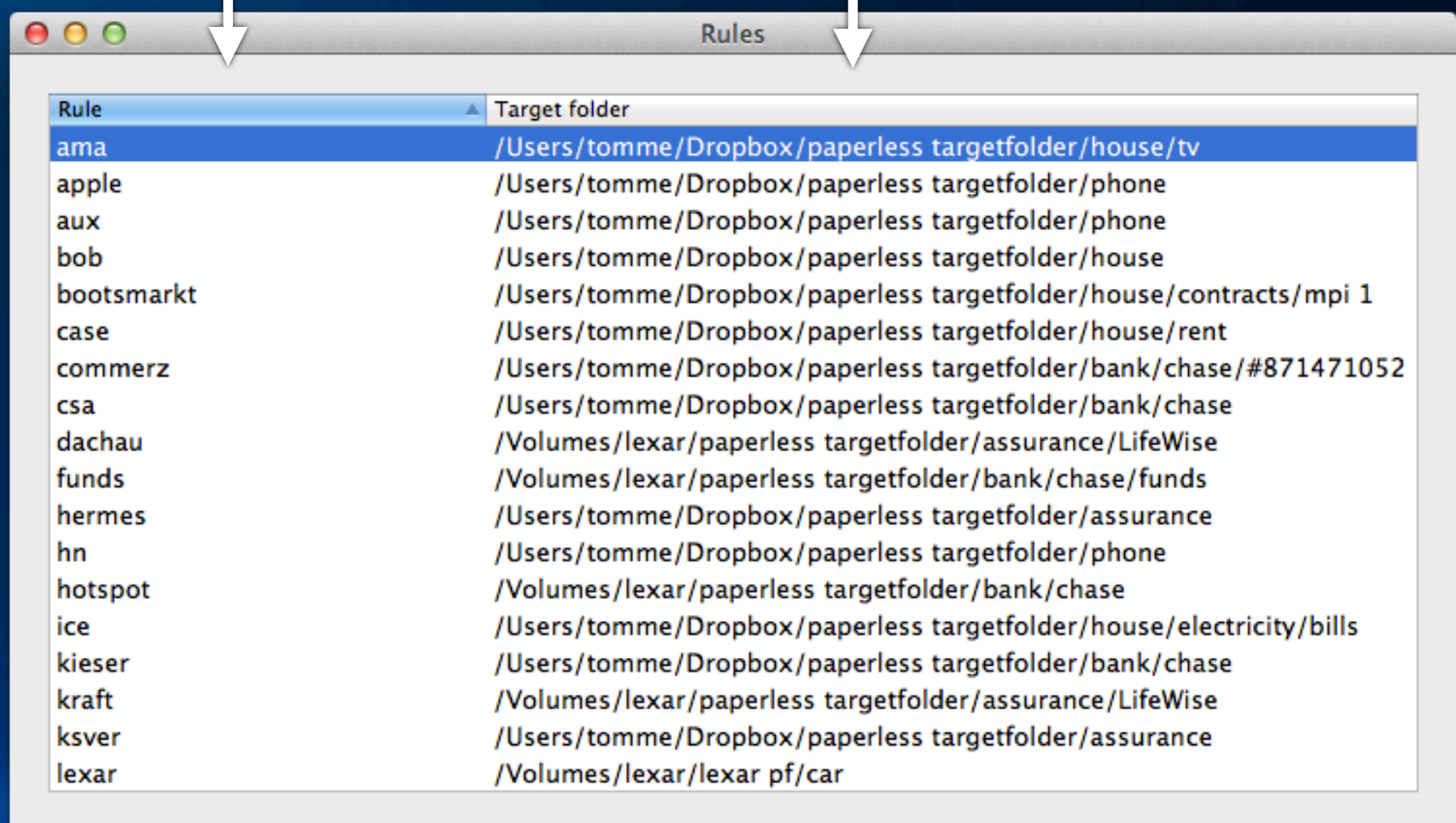
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## Rules window

You can take a look at all the rules PDFiler creates while you are working with it. Go to the „Views“-menu and select „Rules“ to bring up the window with the list of all existing rules. By clicking on the column headers you can change the sort order of the table to your likings.

File name part  
defining the rule

Target folder path



The screenshot shows the 'Rules' window in PDFiler. It contains a table with two columns: 'Rule' and 'Target folder'. The table lists 18 rules, each with a unique file name part and a corresponding target folder path. The 'Rule' column is highlighted with a blue header, and the 'Target folder' column is also highlighted with a blue header. The table is sorted by the 'Rule' column.

Rule	Target folder
ama	/Users/tomme/Dropbox/paperless targetfolder/house/tv
apple	/Users/tomme/Dropbox/paperless targetfolder/phone
aux	/Users/tomme/Dropbox/paperless targetfolder/phone
bob	/Users/tomme/Dropbox/paperless targetfolder/house
bootsmarkt	/Users/tomme/Dropbox/paperless targetfolder/house/contracts/mpi 1
case	/Users/tomme/Dropbox/paperless targetfolder/house/rent
commerz	/Users/tomme/Dropbox/paperless targetfolder/bank/chase/#871471052
csa	/Users/tomme/Dropbox/paperless targetfolder/bank/chase
dachau	/Volumes/lexar/paperless targetfolder/assurance/LifeWise
funds	/Volumes/lexar/paperless targetfolder/bank/chase/funds
hermes	/Users/tomme/Dropbox/paperless targetfolder/assurance
hn	/Users/tomme/Dropbox/paperless targetfolder/phone
hotspot	/Volumes/lexar/paperless targetfolder/bank/chase
ice	/Users/tomme/Dropbox/paperless targetfolder/house/electricity/bills
kieser	/Users/tomme/Dropbox/paperless targetfolder/bank/chase
kraft	/Volumes/lexar/paperless targetfolder/assurance/LifeWise
ksver	/Users/tomme/Dropbox/paperless targetfolder/assurance
lexar	/Volumes/lexar/lexar pf/car



# PDFiler

## Log window

Ever wonder where all those PDFs went you processed with PDFiler?  
Go to the „Views“-menu and select „Log“ to bring up the window  
with the results of your last session.

Results of the last  
processing session

