



# Quick Guide Foxit® PhantomPDF<sup>TM</sup> For Windows



# Foxit® PhantomPDF™ Quick Guide

This guide gives you a brief introduction to the main features of Foxit PhantomPDF. For detailed instructions, please refer to our user manual.

## **Getting Started**

## **Installing Foxit PhantomPDF**

#### **System Requirements**

#### **Operating Systems**

- Windows 7 (32-bit & 64-bit).
- Windows 8.x Full Version.
- Windows 10.
- Microsoft Office® 2007 or later version (required for some PDF creation features).
- Verified as Citrix Ready® with Citrix XenApp® 7.13.

#### **Recommended Minimum Hardware for Better Performance**

- 1.3 GHz or faster processor.
- 512 MB RAM (Recommended: 1 GB RAM or greater).
- 2G of available hard drive space.
- 1024\*768 screen resolution.

#### How to Install

The installer format of Foxit PhantomPDF is MSI. Please download the installer to your computer, and then do the following (Take *Business* Edition for example):

- 1. Double click the "FoxitPhantomPDF\_Business\_enu\_Setup.msi" file, and you will see the setup wizard pop up. Click **Next** to continue.
- 2. Foxit PhantomPDF is protected by copyright law, so in order to proceed, you must accept the License Agreement. Check the I accept the terms in the License Agreement box to continue.
- 3. There are two installation setup types for Foxit PhantomPDF. The user has the ability to change the installation directory or to keep the default settings.
  - **Typical** Installs all features by default, which requires more disk space.
  - **Custom** Allows users to choose which program features will be installed.
- 4. For *Typical Setup*, just click **Install**. For *Custom Setup*, do the following:
  - A) Click on "Browse" to change the installation directory of the PDF Viewer plug-in.
  - B) Click "Disk Usage" to check the disk space available for the selected features.

- C) Check the options you want to install and click "Next" to continue.
- D) Select the additional tasks you would like the Setup to perform, then click "**Install**" to start the installation.
- 5. When the process is complete, a dialog box will notify the user that Foxit PhantomPDF is installed. You can choose to check the **Launch Foxit PhantomPDF** box to run the application right after installation. Click **Finish** to complete the installation.

#### **Command-line Installation**

You can also use the command-line to install the application:

msiexec /Option <Required Parameter> [Optional Parameter] [PROPERTY=PropertyValue]

For more detailed information on msiexec.exe, as well as required and optional parameters, type "msiexec" in the command line or visit Microsoft TechNet Help Center.

#### Public Properties of the Foxit PhantomPDF MSI Installation Package.

Foxit PhantomPDF installation properties supplement the standard MSI public properties to give administrators greater control over the installation of the application.

For the complete list of standard public properties, please refer to:

http://msdn.microsoft.com/en-gb/library/aa370905(VS.85).aspx

The Foxit PhantomPDF properties are:

**ADDLOCAL** 

features> The value of the ADDLOCAL property is a comma-delimited list of features that the installation of Foxit PhantomPDF will make locally available. Foxit PhantomPDF installer is composed of the following features:

**FX\_PDFVIEWER** - Foxit PDF Viewer and its components.

**FX\_FIREFOXPLUGIN** – A plugin used for opening PDF files in Mozilla Firefox, Opera, Safari, and Chrome browsers. This feature requires FX\_PDFVIEWER to be installed.

**FX\_EALS** – A module used for displaying Eastern Asian Languages. Eastern Asian Languages can't be displayed properly without it. This feature requires FX\_PDFVIEWER to be installed.

**FX\_SPELLCHECK** - A tool used for searching any misspelled words in typewriter or form filler mode. This tool also suggests the correct spelling for common mistakes. This feature requires FX\_PDFVIEWER to be installed.

**FX\_PDFA** – A module used for verifying compliance with PDF/A-1a and PDF/A-1b. This feature requires FX\_PDFVIEWER to be installed.

**FX\_OCR** – A module used for making scanned or image-based PDF documents selectable and searchable. This feature requires FX\_PDFVIEWER to be installed.

**FX\_CREATOR** - Foxit PhantomPDF Creator installs a virtual

printer on your system. Creator can convert any printable documents into high-quality PDFs conveniently and efficiently. This feature requires FX\_PDFVIEWER to be installed.

**FX\_CONVERTEXT** - Shell extension used for converting PDFs or combining supported files from the right click menu. This feature requires FX\_CREATOR to be installed.

**FX\_CREATORWORDADDIN** - MS Word toolbar add-in to create PDFs in just one click. This feature requires FX\_CREATOR to be installed.

**FX\_CREATOREXCELADDIN** - MS Excel toolbar add-in to create PDFs in just one click. This feature requires FX\_CREATOR to be installed.

**FX\_CREATORPPTADDIN** - MS PPT toolbar add-in to create PDFs in just one click. This feature requires FX\_CREATOR to be installed.

**FX\_CREATOROUTLOOKADDIN** - MS Outlook toolbar add-in to create PDFs in just one click. This feature requires FX\_CREATOR to be installed.

**FX\_SE** - Plugins for Windows Explorer and Windows shell. These extensions allow PDF thumbnails to be viewed in Windows Explorer, and PDF files to be previewed in Windows OS and Office 2007 (or a later version). This feature requires FX\_PDFVIEWER to be installed.

**FX\_IFILTER** – Foxit PDF IFilter is a plugin for Windows search engines that can help search PDF documents quickly.

**FX\_CONNECTEDPDF** – A plugin that provides ConnectedPDF features including creation, sharing, securing, and tracking of PDF documents worldwide.

**FX\_BROWSERADDIN** - The web browser plugin used for converting web pages to PDFs.

Specifies the folder location of the product installed.

Default value of "1", Foxit PhantomPDF will be set as the

default application for opening PDF files.

**VIEW\_IN\_BROWSER** Default value of "1", Foxit PhantomPDF will be configured to

open PDF files inside browsers.

**DESKTOP\_SHORTCUT** Default value of "1", installer will place a shortcut for the

**INSTALLLOCATION** 

**MAKEDEFAULT** 

installed application on the Desktop.

STARTMENU\_SHORTCUT Default value of "1", installer will create a program menu group

for installed application and its components.

SETDEFAULTPRINTER Default value of "1", installer will install Foxit PhantomPDF

Printer and set it as the system's default printer.

**LAUNCHCHECKDEFAULT** Default value of "1", Foxit PhantomPDF will check if Foxit

PhantomPDF is the default reader when launched.

**KEYPATH** Specifies a license key file and saves it to the PhantomPDF

installation folder.

**REMOVENEWVERSION** Forces an installation to overwrite the newer version of Foxit

PhantomPDF with the value of "1".

**CLEAN** Executes with the command "/uninstall", removing all of

PhantomPDF's registry data and related files with the value of

"1". (Note: This is a command for uninstallation.)

AUTO\_UPDATE Does not download or install updates automatically with the

value of "0"; Automatically checks for updates and downloads updates if any, but lets users choose when to install them with the value of "1"; Automatically installs updates with the value

of "2". The default value is "1".

**CPDF\_DISABLE** Disables the ConnectedPDF features by setting the value to "1".

**EDITION** Specifies an edition to install Foxit PhantomPDF, including

Standard and Business.

NOTINSTALLUPDATE Does not install updates by setting the value to "1". This will

prevent Foxit PhantomPDF from being updated from within the

software.

INTERNET\_DISABLE Disables all features that require Internet connection by setting

the value to "1".

**READ\_MODE** Opens PDF file in Read Mode by default in web browsers by setting

the value to "1".

DISABLE\_UNINSTALL\_SURVEY Stops the Uninstall Survey after uninstallation by setting the

value to "1".

**KEYCODE** Activates the application by key code.

**EMBEDDED\_PDF\_INOFFICE** With the value of "1", opens embedded PDF files in Microsoft

Office with Foxit PhantomPDF if Acrobat and Foxit Reader is not installed. (For the EXE installation package, inputs the command-

line /displayadobeindoc.)

Command-line Examples:

1. Silently install the application (no user interaction) to folder "C:\Program Files\Foxit Software":

msiexec /i "Foxit PhantomPDF.msi" /quiet INSTALLLOCATION="C:\Program Files\ Foxit Software "

2. Install the Foxit PDF Viewer only:

```
msiexec /i "Foxit PhantomPDF.msi" /quiet ADDLOCAL="FX_PDFVIEWER"
```

3. Use the license key file saved in disk C to activate the application when running the setup:

```
msiexec /i "Foxit PhantomPDF.msi" KEYPATH="C:\fpmkey.txt"
```

4. No installation of Foxit PhantomPDF Printer:

```
msiexec /i "Foxit PhantomPDF.msi" ADDLOCAL=ALL, ADVERTISE="FX_CREATOR" /qn
```

5. Force an installation to overwrite the same or higher version of Foxit PhantomPDF:

```
msiexec /i "Foxit PhantomPDF.msi" REMOVENEWVERSION="1"
```

6. Remove registry and user data when performing silent uninstallation:

```
msiexec /x "Foxit PhantomPDF.msi" /quiet CLEAN="1"
```

7. Install the application without ConnectedPDF related features and services:

```
msiexec /i "Foxit PhantomPDF.msi" ADDLOCAL=ALL, ADVERTISE="FX_CONNECTEDPDF"
```

8. Activate the application by key code:

```
msiexec /i "Foxit PhantomPDF.msi" KEYCODE="your key code"
```

9. Install the application without Foxit PhantomPDF Create PDF Toolbar

```
msiexec /i "Foxit PhantomPDF.msi" ADDLOCAL=ALL, ADVERTISE="FX_BROWSERADDIN"
```

## **Activating Foxit PhantomPDF**

- After installing Foxit PhantomPDF, the activation wizard pops up. If you have already purchased a license for Foxit PhantomPDF, click Activate to register your license key. If not, you can click Buy Now to purchase Foxit PhantomPDF from the Foxit website. If you choose Free Trial, you will be given a 14-day free trial period to use Foxit PhantomPDF. When the free-trial period expires, only the free features are available.
- 2. After you click **Activate**, the box will prompt you to input the code of the registration key. You can activate the key at a later time from **Help** > **Activate** when you run Foxit PhantomPDF. Then click **Activate** to continue.
- 3. (Optional) If you didn't provide your name when purchasing the license, you'll be prompted to type your name.
- 4. If the activation is successful, a message box will pop up. Click **OK**.
- 5. You should restart the application for the changes to take effect. To restart it now, please click

**OK**; or click **Cancel** to restart later.

## **Deactivating Foxit PhantomPDF**

You can deactivate Foxit PhantomPDF on one machine in order to activate on another. After deactivation, you can still use the features of Foxit PhantomPDF *Express*. To deactivate Foxit PhantomPDF, click **Help > Deactivate**.

## **Uninstalling Foxit PhantomPDF**

#### **How to Uninstall**

Please do one of the following:

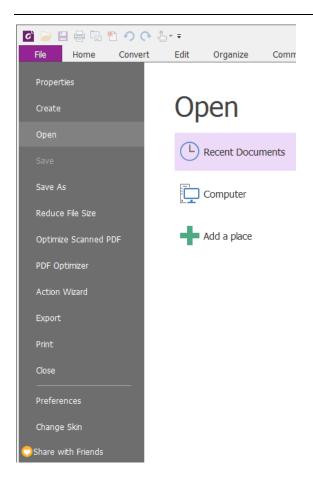
- Click Start > All Programs > Foxit PhantomPDF > Uninstall.
- For Windows 8 and 10, click Start > Windows System > Control Panel > Programs > Programs
   and Features > Select Foxit PhantomPDF and click Uninstall. For Windows 7, click Start >
   Control Panel > Programs and Features to uninstall it.
- Double click the file uninstall.exe under the Foxit PhantomPDF installation directory drive name: \...\Foxit Software\Foxit PhantomPDF\.

# **Using Foxit PhantomPDF**

- File menu
- Skin and Toolbar
- Move around the documents and select things
- See all the different commands
- Standards Validation and Creation
- Integrate with Foxit PDF IFilter

#### File menu

The functions **Open**, **Save**, **Print**, **Action Wizard**, and other basic tools can be accessed by clicking the **File** menu, and then selecting them from the drop-down menu. Click **Open** to open PDFs in your local drives or cloud servers including SharePoint, OneDrive, Google Drive, and more. To check the document properties, select the file menu and go to **Properties**. To change Program settings select **Preferences**.



#### **Skin and Toolbar**

There are five kinds of skins, **Classic**, **Black**, **Blue**, **Orange and Purple** that allow the user to change the look of the software. To change the skin of the workspace, choose **File** > **Change Skin** > Select the desired skin from the list.

#### **Ribbon Mode**

The Ribbon Mode is an interface with a set of toolbars placed in categories on a tabbed bar. A ribbon provides the user interface of an application with a large toolbar filled with graphical representation of control elements, which are grouped by functionality. Foxit PhantomPDF's Ribbon Mode groups commands by task, eliminating the need for many different icon-based toolbars, while ensuring the commands used most frequently are close at hand.

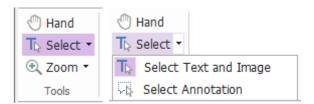


(Business Edition)

Show/Hide the Ribbon

Click or v in the upper right corner to collapse/expand the toolbar.

## Move around the documents and select text, image or annotations



The four most useful commands for navigating and interacting with PDFs are Hand, Select Text and Image, Select Annotation, and Zoom. The Hand command lets you scroll through the PDF, respond to links, fill in forms, and play multimedia files. The Select Annotation command allows you to select multiple annotations and then move, resize, or align them together. The Select Text and Image command lets you select text or image to copy, edit, add annotations, or manage bookmarks. The Zoom command lets you zoom in or out the page easily for better reading experiences.

#### See all the different commands



**Home Tab in Business Edition** 

Click the buttons in the ribbon under different tabs to switch between different commands. Also, the tooltip appears when the pointer is held above each command. For instance, there are Tools, View, Edit, Comment, Page Organization, Convert and Protect groups that are all most frequently used under the **Home** tab. You can use these text and annotation command to move around and interact with PDFs, zoom in/out pages, edit page contents, manage comments, organize pages, scan and OCR, place signatures, and perform other basic functions.

To quickly find a command you need, click in the **Tell me what you want to do...** box (or press **Alt** +**Q**) near a bubble on the menu bar and type the name or description of the command. Then Foxit PhantomPDF will display a list of matching commands from which you can select and activate the desired feature.

## **Industry Standards Validation and Creation**



With the **Industry Standard** command in Foxit PhantomPDF, you can specify the PDF's standards for specific industries and functions. Foxit PhantomPDF has PDF/A, PDF/E and PDF/X compliance validation and creation to meet industry standards. Select **Convert** > **Compliance** > **Industry** 

**Standard** Analyze or Analyze and Fix in the pop-up dialog box. You can also create standard compliant PDFs by saving them as PDF/X, PDF/A or PDF/E with Foxit PhantomPDF *Business*.

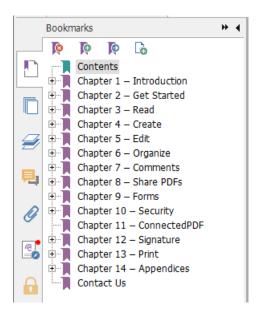
## **Integrate with Foxit PDF IFilter**

Foxit PhantomPDF is now packaged with Foxit PDF IFilter for Desktop, which allows users to index a large amount of PDF documents and then quickly find text within these documents on a desktop system. You can trigger Foxit PDF IFilter in the installation directory of Foxit PhantomPDF.

## **Document Views**

## Go to Specified pages

- Click the First Page, Last Page, Previous Page and Next Page in the Go To group under the View tab or in the status bar to view your PDF file. You can also input the specific page number to go to that page. The Previous View lets you return to the previous viewed instance and Next View goes to the next viewed instance.
- To jump to a topic using bookmarks, click the **Bookmark** button on the left Navigation pane. And then click the bookmark or right-click the bookmark and choose "Go to Bookmark". Click the plus (+) or minus (-) signs to expand or collapse the bookmark contents.



• To jump to a page with page thumbnails, click the Page **Thumbnails** button on the lef

Navigation pane and click its thumbnail. To move to another location on the current page, drag and move the red box in the thumbnail. To resize a page thumbnail, right-click on the thumbnail and choose "Enlarge Page Thumbnails" or "Reduce Page Thumbnails".

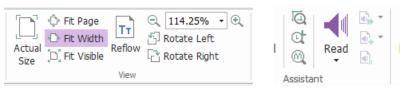
#### Change the way the document is displayed



The Page Display Commands

Foxit PhantomPDF offers a number of different ways to view the pages of a PDF, customized to your preference. Under the **View** tab, you can choose the following page layouts: Single Page, Facing, Continuous, Continuous Facing, Split, and Separate Cover Page.

## Adjust the page magnification



**The View Commands** 

Click **Home** tab and choose the commands in the **View** group.

- 1. Click **Zoom In** or **Zoom Out** to increase or decrease the magnification of the document.
- Click Fit Page to see an entire page on screen, Fit Width to make the page fill the width
  of the screen, Fit Visible to fit only the visible area of the page, and Actual Size to return
  the page to its actual size.
- 3. Click **Rotate Right/Left** to rotate the page view clockwise/counterclockwise in 90-degree increments.

Under the View tab, you may choose the following commands in the Assistant group:

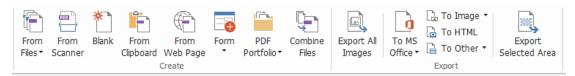
- 1. Click the **Marquee Zoom** command to enlarge an area of the page.
- 2. Click the **Loupe** command and move it to the location on the page you want to view, and you will see that specific location amplified or diminished in the Loupe command dialog box.

Click and move around the **Magnifier** command to easily magnify areas of the PDF.



## **Create & Export**

Foxit PhantomPDF gives you almost unlimited options to create PDFs, as well as create 3D PDF files from .dwg and .dxf files. In the Convert tab, you can directly create PDFs from specific files, a blank page, a web page, a scanner, or from the clipboard. You may also create PDF portfolios, as well as export PDFs to images, MS office, HTML and more.



The Create and Export Groups

- Create PDF with one-click
- $\triangleright$ **Create PDF from Microsoft Office**
- $\triangleright$ Create PDF from Microsoft Visio (Business Only)
- Create PDF using the Print command
- $\triangleright$ Create PDF using Print to Evernote
- $\triangleright$ **Create a PDF using Scanner**
- $\triangleright$ Create a PDF within web browsers
- **Create PDF Portfolios**
- **Export PDF all images**
- Export PDF to Image, MS Office, HTML and others

## Create PDF with one-click

To create a PDF with one click:

Drag the document you want to convert onto the Foxit PhantomPDF desktop icon



- If Foxit PhantomPDF is open, drag and drop the file directly into the application window.
- Right click the document icon you want to convert and choose Convert to PDF in Foxit PhantomPDF.

Foxit PhantomPDF also allows you to quickly create PDFs from blank pages, the clipboard, webpages, and create a PDF form from an existing file, with commands in File > Create or under the **Convert** tab. When creating from webpages, you can choose to convert the entire website or a specified number of levels of the website, and set more options like timeout, hyperlinks, and more.

#### Create PDF from Microsoft Office

Foxit PhantomPDF enables you to create professional and secure PDF files directly from Microsoft Office applications (Word, Excel, PPT and Outlook). Creating PDFs from Microsoft Word automatically retains bookmarks, links, outlines, and other settings during conversion.

Foxit PhantomPDF also allows you to convert personalized email messages, letters, or labels created from Microsoft Word's **Mail Merge** function into PDFs all at once. You can also change the settings to send the PDFs via email attachments to a number of individuals if needed.

## Create PDFs in Microsoft Visio (Business Only)

PhantomPDF Creator Plugin in Microsoft Visio provides quick and easy PDF creation from Visio files, while preserving the document properties in the created PDFs depending on the conversion settings.

#### **Create PDF using the Print command**

- 1. Open the file.
- 2. Select File > Print from the main menu.
- 3. Select Foxit PhantomPDF Printer from the Printer list.

#### **Create a PDF using Print to Evernote**

Foxit PhantomPDF adds a new printer "Print to Evernote" after installation. This feature enables the user to send the PDF file as an attachment to Evernote, as well as the option to create a PDF the same as Foxit's PDF printer does.

To create a PDF using Print to Evernote, see below:

- 1. Install the Evernote application and sign in to an Evernote account.
- 2. Open the file you want to convert to PDF, and choose **File > Print > Print to Evernote**.
- 3. Set the print properties and then click **Print**. Name the PDF file and specify the storage location.
- 4. You will see that the PDF file is created and attached in Evernote.

#### **Create a PDF using Scanner**

Foxit PhantomPDF allows you to create a PDF directly from a paper document using your scanner. You can scan a document to PDF directly with custom settings or by using preset preferences that you configured before.

To scan a document to PDF with custom settings, use the following options: 1) File > Create > From Scanner > the From Scanner... button, 2) Choose Convert > Create > From Scanner, or 3) Choose Home > Convert > Scan.

To scan a paper document to PDF using a configured preset, select a preset to scan documents

under the Home > Convert > Scan.

Foxit PhantomPDF supports size optimization of scanned PDFs during PDF creation from a scanner, also by choosing **File** > **Optimize Scanned PDF** in an existing scanned or image-based PDF.

#### Create a PDF within web browsers

Foxit PhantomPDF allows you to convert webpages to PDFs using the Foxit Convert tools in the toolbar within Google Chrome, Internet Explorer, and Firefox. You can convert the current webpage to a new PDF or append to an existing PDF, or send the new PDF as an email attachment with one click.

#### **Create PDF Portfolios**

Foxit PhantomPDF lets you quickly create a new PDF portfolio with existing files or folders by choosing **Convert** > **Create** > **PDF Portfolio** > **Create** a **new PDF Portfolio**, or by creating a blank PDF portfolio and adding files or folders by selecting **Create** a **blank PDF Portfolio**.

## **Export all images in the PDFs**

With one click of "Export All Images", Foxit PhantomPDF enables you to export all images in your document to separate image files. Please click **Convert > Export > Export All Images**, and configure the settings before exporting via the **Export to Images** dialog box.

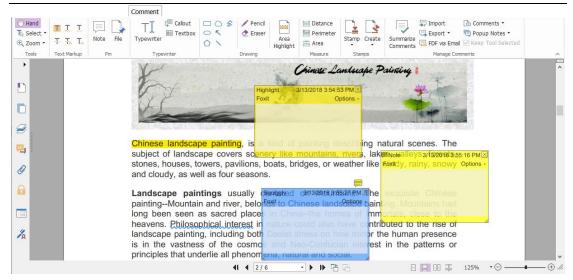
## **Export PDF to Image, MS Office, HTML and others**

- 1. Click Convert tab.
- 2. Select the **To Image**, **To MS Office**, **To HTML**, or the **To Other** button to convert PDFs to the format desired.
- **3.** You can click **Settings** in the **Save As** dialog box to change the page range and layout preferences. Then click the **Setting Language** button to select the language you want to export the file with.

## Comment

With Foxit PhantomPDF, you can add annotations or draw shapes to PDF files as you do to a paper document using the commenting, markup, and drawing commands. When you are done, all comments will be organized automatically, and can then be exported for convenient review.

## Foxit PhantomPDF Quick Guide

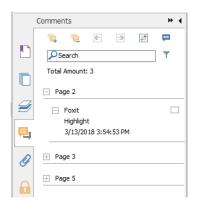


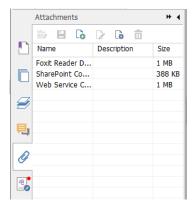
With the Hand command the Select Annotation command or the corresponding command selected, right-click a comment and you can choose to set properties, set statuses, reply to comments, and more. You can export and import comment data and summarize comments using the commands in the **Manage Comments** group. Moreover, if you make comments in a PDF file which is created from a Microsoft Word document, you can easily export the comments to revise the original Word document by choosing **Comment > Manage Comments > Export > Export to Word**.

**Note**: You can view, navigate, and comment on the 3D content in PDFs by using the commands in the **3D Content Navigation** panel located in the navigation pane.

#### See comments and attachments

Foxit PhantomPDF keeps organized listing of all comments and attachments in a PDF for easy reference. These are hidden by default to give you the largest possible view of your PDF document. To make them visible, click the Comments or Attachments buttons on the left Navigation pane.





## **Edit**

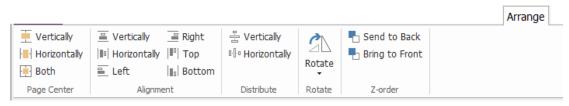


The Edit Tab in Business Edition

Foxit PhantomPDF lets you easily customize your PDFs by using general editing features to add links, attach files, add images, play and insert multimedia files, and other PDF editor capabilities including layer editing, Search and Replace, and PDF optimizing. Foxit PhantomPDF also provides advanced features to add objects (text, images, path and shading objects) and edit them, including font settings (font, font size, color, underline, etc.), paragraph settings (justify/align left/center/right, character spacing, character horizontal scale, line spacing), style settings, and objects' splitting and merging.

When you use object editing commands, like the Edit Text command and Edit Object command, and click on text or an object, an Arrange tab appears for more editing features.

- Adding objects click Add Text T, Add Images , Add Shapes to add objects to the PDFs and change settings if needed.
- Paragraph editing click Edit Text and select the paragraphs you want to edit, or just right-click the selected text with the Select Text and Image command and choose Edit Text. You can start a new line by pressing "Enter". The text wraps automatically when the text being typed flows to the margin of the paragraph box. Also, the text within the paragraph box can reflow automatically and the paragraph box will then automatically rescale.
- Object editing click Edit Object and select the object you want to edit. It allows you
  to change the font, font size/color, and others of the text object. You may also move, resize,
  delete, or rotate the objects you selected. When you edit image, path or shading objects, the
  corresponding format tabs will appear.
- **Clipping** Clip objects to make desired shapes of objects visible.



**Object Arrange Tab** 

- Arrange you can align the PDF content in your PDF file, or arrange them in the center of the page.
- Reflow Editing click the Reflow Editing command to edit document content in a continuous mode, like in a word processor.

**Tip:** You can do more actions by right-clicking an object with the Edit Object command.

# **Organize**



The Organize Tab in Business Edition

Foxit PhantomPDF enables you to directly organize PDF files by inserting/deleting pages, moving/extracting pages, splitting documents, merging pages, re-arranging pages, and composing page outlines. You may also add watermarks, backgrounds, change the header and footer, add bates numbering, and other page marks from the **Organize** tab. Also, you can drag and drop page thumbnails in the page thumbnail panel to assemble pages in different documents. You can even drag the page thumbnails to the blank areas to extract the selected page(s) as a new PDF file.

## **Forms**

PDF forms streamline the way you receive and submit information. Foxit PhantomPDF allows you to fill in, reset, create, save and submit forms, and more.

- Fill in PDF forms
- Comment on forms
- Work on form data
- Create and edit forms
- Form recognition
- Set calculation order
- About running JavaScript

#### Fill in PDF forms

Foxit PhantomPDF supports *Interactive PDF Form* (Acro Form and XFA Form) and *Non-interactive PDF Form*. You can fill in Interactive forms with the Hand command. For non-interactive PDF forms, you can use the Typewriter command ; or you can have Foxit PhantomPDF recognize form fields with the Run Form Field Recognition command.

Foxit PhantomPDF supports the **auto-complete feature**, which enables you to fill in PDF forms quickly and easily. It will store the history of your form inputs, and then suggest matches when you

fill out other forms in the future. The matches will be displayed in a pop-up menu.

**Note:** To use the auto-complete feature while filling in PDF forms, click **File > Preferences > Forms**, and check **Enable Autocomplete.** You can also choose to clear the history of your form inputs.

#### **Comment on forms**

You can comment on PDF forms, just like any other PDFs. You can add comments only when the form creator has extended these rights to the users. **See also Comment**.

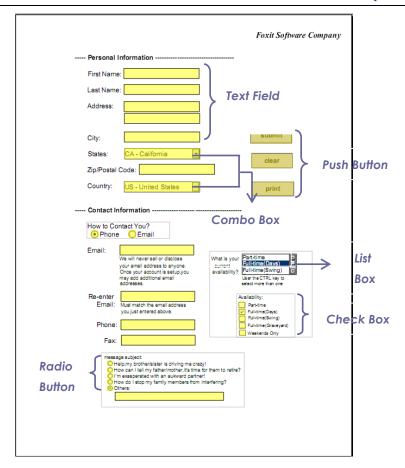
#### Work on form data

Click the **Import** button or **Export** button in the **Form Data** group to import/export form data of your PDF file. This is similar to the way of importing and exporting comment data. You can also export form data to append to an existing CSV file or combine multiple PDF forms to a CSV file. However, this function will only work for PDF interactive forms. Foxit PhantomPDF provides users with the **Reset Form** command to reset the form. In addition, for PDF forms with Ultraform technology, Foxit PhantomPDF enables users to create and display 2D barcode that contains form data.

#### Create and edit forms



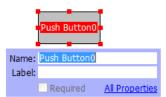
With Foxit PhantomPDF, you can create interactive forms. You are able to add push buttons, text fields, check boxes, combo boxes, list boxes, or radio buttons to create an interactive PDF form and specify their properties. You can also set a PDF page as a page template, which is very useful in designing extensible forms where users can quickly add the page template to a PDF by creating a button with Java scripts. To make a form more accessible, you can click **Add Tooltip** to add tooltips automatically for all form fields which does not have descriptions.



A PDF Form

#### **Creating form fields**

Here take the Push Button as an example. You can create this button by selecting it in the **Form Fields** group. You can move, resize, and delete the Push button by selecting the **Select Annotation** command . You can set the button properties to determine the button appearance, actions and behaviors, and other form field settings.



**Note:** For the radio buttons in a group, they should have the same form field name but with different export values. This ensures that the radio buttons toggle and that the correct values will be collected in the database.

#### **Form Recognition**

Foxit PhantomPDF provides **Semi-Automated PDF Form Design** features for users to easily develop interactive PDF forms. Normally, users need a way to define the form fields directly in their design layout or scanned file. **Run Form Field Recognition** is an important command and can save the

user's time in creating interactive PDF forms.

#### 1. Run Form Field Recognition

Open the PDF file in Foxit PhantomPDF. Click **Form** tab and select **Run Form Field Recognition**. Foxit PhantomPDF looks for boxes, underlines, and other cues in your file that indicate a place to enter information and changes them into text fields and check boxes. All fillable fields in the document will be recognized and highlighted.

**Note:** To run form recognition automatically when a PDF is opened in Foxit PhantomPDF, please click **File > Preferences > Forms**, and check the option "Run form recognition when creating PDF in PhantomPDF application".

#### 2. Inspect and correct the form results with Designer Assistant

Because the recognition process is not always perfect, you'll need to clean up your forms, add missed fields, adjust default font settings, and other general clean up duties to correct any errors. With the **Designer Assistant** and other **Form Field** commands, you can easily complete all the operations above because the Designer Assistant command can inspect corresponding form fields and change the settings automatically. You can modify the name directly in the pop-up box and click "All Properties" to change the settings. **See also:** <u>Creating form fields</u>.

**Note:** Click **File > Preferences > Forms**, check the option "Open simple property box after creating field".

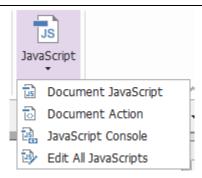
#### Set calculation order

When you define two or more calculations in a form, the order in which they are carried out is the order in which you set the calculations. If you want to use the results obtained from calculating two form fields to calculate the value of a third form field, the first two form fields must be

calculated together first to obtain the correct results. Click the **Calculation Order** button under the **Form** tab.

#### About running JavaScript

With Foxit PhantomPDF, you can invoke JavaScript code using actions associated with documents, bookmarks, links, and pages. Foxit PhantomPDF provides four options: Document JavaScript, Document Action, JavaScript Console, and Edit All JavaScripts. The Document JavaScript lets you create or access document level scripts in Foxit PhantomPDF. The Document Action lets you create document-level JavaScript actions that apply to the entire document. The JavaScript Console provides an interactive and convenient interface for testing portions of JavaScript code and experimenting with object properties and methods. The Edit All JavaScripts option allows you to create and edit all JavaScripts (e.g. bookmark JavaScripts, page JavaScripts, etc.) in the JavaScript Editor.



#### **Optional Database connectivity to Windows ODBC**

The Optional Database Connectivity plug-in is a JavaScript object inside Foxit PhantomPDF, allowing you to connect to Windows ODBC (Open Database Connectivity) data sources. Also, developers can create document level-scripts to connect to a database for the purposes of inserting new data, updating information, and deleting database entries. Currently, ADBC (Acrobat Database Connectivity) is a Windows only feature and requires Open Database Connectivity (ODBC) provided by Microsoft.

## **OCR**



Optical Character Recognition (OCR) is a software process that enables images of printed text to be translated into machine-readable text. OCR is most commonly used when scanning paper documents to create electronic copies, but can also be performed on existing electronic documents (e.g. PDF or PDF portfolio). With Foxit PhantomPDF, you can scan paper documents directly to PDF, and run OCR to make the scanned documents searchable and editable.

OCR Suspects - Foxit PhantomPDF can detect the suspected and mark them in OCR results and allows you to edit the recognition results to improve the accuracy of OCR results. Click **Suspect Results** under the **Convert** tab and select **First Suspect/All Suspects** from the pull-down menu. The Find OCR Suspects dialog box shows both the original document text and the OCR text. You can edit text in the OCR text box directly if needed. If the highlighted text is incorrectly identified, click **Not Text**. Click **Find Next** to find the next suspect or click **Accept and Find** to accept the suspect and find next.



**Tip:** Foxit PhantomPDF provides the **Quick OCR** command under the **Home/Convert** tab for recognizing all pages of a scanned or image-based PDF with the default or previously set settings in just one click.

## Share

Foxit PhantomPDF enables users to send PDFs as attachments to others or to their Evernote/OneNote accounts with one-click. Users can also share a document on an internal server or a Foxit Server with others to gather feedback/comments from other reviewers. Integration with SharePoint, NetDocuments, iManage WorkSite, iManage Cloud, Egnyte, OpenText Documentum, OpenText eDOCS, OpenText Content Suite, and Worldox lets users share and manage documents easily within one application.

- Review Documents
- Integration with with SharePoint, NetDocuments, iManage WorkSite, iManage Cloud,
  OpenText Documentum, OpenText eDOCS, OpenText Content Suite, and Worldox

#### **Review Documents**

**Shared Review** allows document authors to share a document on an internal server or on Foxit Cloud. After receiving the invitation from the review initiator, reviewers can mark-up PDFs using a full set of commenting commands. They will be notified if others add new comments, in which they can reply to these comments. Comments from both the initiator and reviewers will be automatically collected on the internal server or on Foxit Cloud, and then synchronized by Foxit PhantomPDF on a regular interval.

**Email Review** is useful when reviewers don't have access to a common server or initiators don't need collaborative reviews. In an **Email Review**, the initiator sends PDFs to reviewers as attachments and can view comments only after receiving the commented PDFs back from reviewers. Also, the reviewers can only send back the PDFs after adding comments, without access

to viewing comments made by others.

To send a PDF for review, please choose **Share** > **Review** > **Send for Shared Review** or **Send for Email Review**. (*Business* Only)

The review **Tracker** can help review initiators or reviewers track all comments and manage the whole review process in real time.

If you are collecting comments for a PDF file under shared review or email review which is created from a Microsoft Word document, you can easily export the comments to revise the original Word document by choosing **Comment > Manage Comments > Export > Export to Word**.

Integration with SharePoint, NetDocuments, iManage WorkSite, iManage Cloud,
OpenText eDOCS, OpenText Documentum, OpenText Content Suite, and Worldox

Foxit PhantomPDF enables you to directly open, modify, save, and check out/in PDF documents in your SharePoint, NetDocuments, iManage WorkSite, iManage Cloud, OpenText eDOCS, OpenText Documentum, or OpenText Content Suite account using PhantomPDF, which allows you to streamline your PDF document management. Integration with Worldox also allows you to open, modify, and save PDF document in your Worldox account.

## Secure & Sign

Foxit PhantomPDF offers powerful protection for PDF content. You can encrypt and secure PDF files to prevent unauthorized access, restrict sensitive operations, apply digital signature, and more.



The Protect Tab in Business Edition

- Secure document
- Manage security policies
- RMS protector (Available in Business Only)
- About Signature
- Redaction (Available in Business Only)
- Sanitize Document
- Generate Redacted and RMS-protected PDFs (Available in Business Only)

## Secure document

In Foxit PhantomPDF, there are three types of security services that control who can access your files, what actions they can perform once they receive them, and who can open a protected

document. The three types are Password Protect, Certificate Protect, and Microsoft Windows Rights Management Services Encrypt.

Password Protect: Passwords allow you to limit access and restrict certain features, such as printing, copying, and editing.

- **Open password:** Users must enter the correct password to open the document.
- Permission password: Lock specific functionality when a user opens your file. For example, you can prevent recipients from modifying or printing your document.

Certificate Protect: The advantage of securing documents with certificates is that authors can specify unique permissions for each person. For example, authors can permit a person to fill in forms and comment in documents, as well as permit another person to edit text or delete pages.

To view the security in a file, select File > Properties > Security, or click the Security Properties



in the **Protect** tab.

#### Manage security polices

If you often apply the same security settings to multiple PDFs, you can save your settings as a policy that you can apply to other PDFs. Security policies include the security method, encryption password, permission settings, and other security settings. To manage this, click the Security





**Policies** in the **Protect** ribbon.

## RMS Protector (Available in Business Only)

Foxit PhantomPDF RMS protector provides seamless integration with Microsoft's Windows Rights Management Services to protect PDF documents and manage policy templates. If you are authorized you can use Foxit PhantomPDF to open an RMS-Protected document to improve information security and meet compliance requirements. Once installed, Foxit PhantomPDF will extend all Microsoft AD RMS services to all PDF files.

## **RMS Encryption**

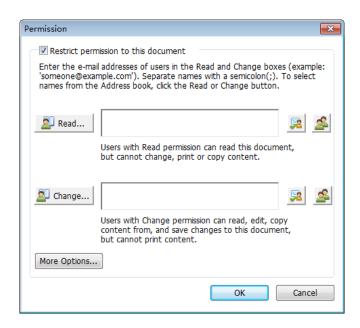
- 1. Click Protect > AD RMS Protect > Restricted Access.
- 2. Choose the template to add RMS encryption. You can also create custom templates. See **Template Creation**.



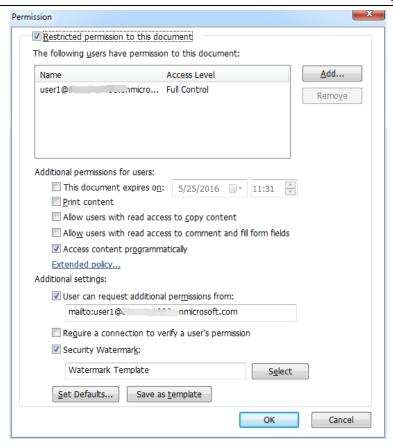
- 3. If you do not want to use templates, please click **Restricted Access**.
- Type your account name and password when you login to the RMS server for the first time.
- Click the icon Read... to add users who you want to authorize for reading permissions.

  (If you have an Outlook Email Client, the contact list of Outlook will pop up when you click the icon Read...

  Then you can go on to the More Options step.)



• (Optional) Click **More Options** in the Permission dialog box. The users you selected now will be shown on the text box. You can also add or delete users as needed here. Specify the permissions as needed and click **OK**.



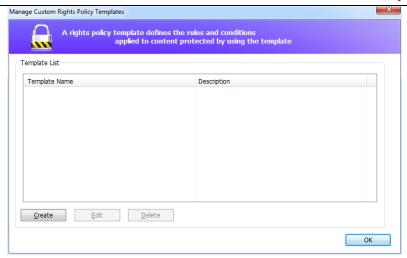
 Click **OK** and save the changes. The document will be protected by the permissions you just set.

**Note**: Foxit PhantomPDF also supports Microsoft IRM Protection Version 2, which allows PDF documents to be encrypted to PPDF format. The encryption policy of Microsoft IRM Protection Version 2 does not include dynamic watermark, extended policy, and dynamic revocation.

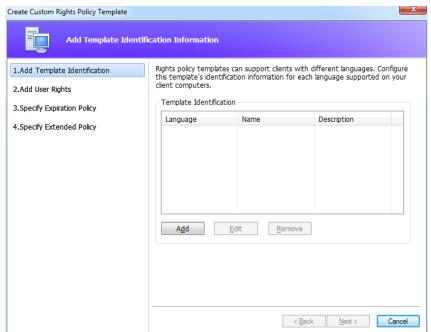
## **Template Creation and Editing**

To create a custom template, please see the following steps:

1. Choose **Protect > Settings > Custom Templates**.



2. Click **Create** to open the **Create Custom Rights Policy Template** dialog box. (If you want to edit the existing template, please click **Edit**.) Set the custom permission settings in the four steps during template creation.



To create a security watermark in the fourth step (Specify Extended Policy), please refer to <u>Security Watermark</u>.

## **Security Watermark**

#### **Creating Profile**

Before adding a watermark, you should create a profile first. You can only choose a profile and not a specific watermark to add when applying to a PDF in the same profile.

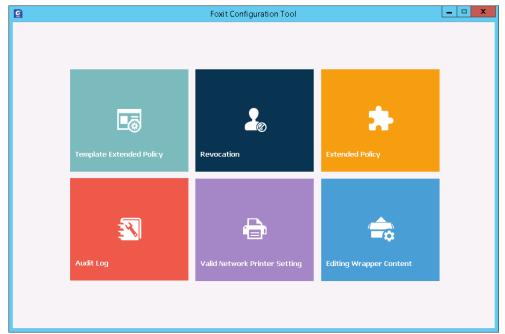
- Choose Protect > Settings > Security Watermark.
- Click **New Profile** to create a profile and name it.
- Fill in the watermark's content in the text box and set the font, size, color, underline, and alignment.

Note: you can only set text as watermarks.

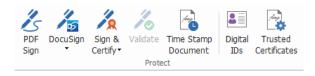
- Choose the Dynamic Text. When any PDF reader opens the file, the watermark will show the current document information dynamically. You can use multiple dynamic texts at the same time
- Set the appearance by choosing the rotation degree and the opacity. You also have the option to make the scale relative to the target page.
- Set the vertical and horizontal distance between the target page and the watermark.
- Choose the page range to apply the watermark. You can select the different page range options by selecting from the subset list.
- Preview the watermark in the right pane.
- Click **OK** to finish.

## **Foxit Configuration Tool**

Foxit PhantomPDF RMS protector provides a handy configuration tool for administrators to better modify the protection settings on an RMS server. Administrators can directly enable/disable each tool, edit the extended policy of official templates, dynamically revoke permissions, audit logs, set valid network printers, and customize wrapper files.



#### **About Signature**



#### **Digital IDs**

A digital ID contains two keys; one is a public key (certificate) that is used to encrypt or lock data,

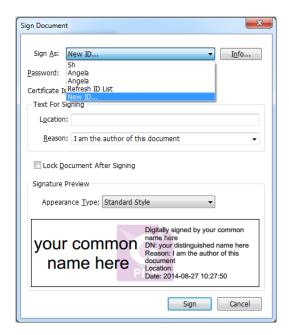
and the other is a private key that is used to decrypt or unlock data that is encrypted.

You can distribute the certificate that contains the public key and other identifying information to those people who need to use it to verify your identity or validate your signature. Only your private key can unlock information that was encrypted using your certificate, so make sure to store your digital ID in a safe place.

Digital IDs are usually protected by password; you can store it on a computer in PKCS#12 file format, or in the Windows Certificate Store. For company-wide deployment, IT managers can also use the <a href="SignITMgr tool">SignITMgr tool</a> to configure which digital ID file is allowed to sign PDF files by users across an organization.

Foxit PhantomPDF enables you to create self-signed digital IDs in the following steps:

Click Sign & Certify > Place Signature in the Protect ribbon, click and drag a signature area.
 In the Sign Document dialog box, select New ID to create a new one from the dropdown list from Sign As.



- Choose the location to store your self-signed digital ID.
- Enter your identity information when generating the self-signed certificate.
- Enter a file location and password for your new digital ID file.

#### **Signing documents**

Before you sign a document, you need to draw a signature field where the signature is placed, get a digital ID, and create the signature.

You can click Sign & Certify > Place Signature in the Protect tab to finish signing.

A PDF is signed to indicate your approval. The signature will not be resized and moved when you sign the document. Multiple people can sign a PDF more than once. When you sign a document, your digital signature appears in the signature field. The appearance of the signature depends on your preferences.

#### Certifying a PDF (Available in Business Only)

Only the author can certify his/her own PDF documents. The author can specify what changes can be made to the file after certifying. Whenever approved changes are made, the certificate remains valid. If a reader tries to make changes you haven't allowed, the certificate is invalidated and any subsequent users will be notified that the document was tampered with.

## Add a time stamp to digital signatures and documents

Time stamps are used to specify the date and time you signed a document. A trusted time stamp proves that the contents of your PDFs existed at a point-in-time and have not changed since then. Foxit PhantomPDF allows you to add a trusted time stamp to digital signatures or documents.

Before adding a time stamp to digital signatures or documents, you need to configure a default time stamp server. Go to File > Preferences > Time Stamp Servers, and set a default time stamp server. You can then sign the document by placing the digital signature, or by clicking Protect > Protect > Time Stamp Document to add a time stamp signature to the document. You need to add the time stamp server into the trusted certificate list so the properties of digital signatures will display the date/time of the time stamp server when the document was signed.

To add a trusted time stamp server to the **Trusted Certificates** list, click **Timestamp Properties** in the lower left corner of the **Signature Properties** dialog box. In the pop-up **Timestamp Properties** box, click **Add to Trusted Certificates**. If a time stamp signature was added in the document, you can right-click the timestamp signature in the **Digital Signature** panel and choose **Show Signature Properties**. In the pop-up **Signature Properties** dialog box, click **Add to Trusted Certificates**.

#### **Quick PDF Signature**

Quick PDF Sign enables you to create your self-signed signatures and add the signatures to the page directly. You don't need to create different signatures for different roles.

To create your own handwritten signature and sign a PDF, follow these steps.

- 1. Choose **Protect > Protect > PDF Sign**. The **PDF Sign** tab appears on the toolbar.
- 2. Click in the signature palette or click on the lower right corner of the signature palette and choose **Create Signature** from the drop down menu.
- 3. In the **Create Signature** dialog box, you can draw a signature, import a file, copy from the clipboard, or type text content to create a signature. Or, click **Online Signature** to choose a signature from the online signatures you saved before.

**TIP**: You can sign your signature on a clean white sheet of paper using a black pen, and scan it to an image file. To create the best signature, it is suggested to scan your signature in monochrome at 600 DPI.

- 4. You can preview the signature in the **Preview** box.
- 5. Check the options as needed:

**Convert signature to black & white**: the signature will be created in black and white even if the original image is chromatic.

**Discard the signature when program closes**: the signature will not be listed in the signature palette next time you launch PhantomPDF.

**Require password to use this signature**: Specify a password that will be required when users sign the document with the signature. Enter the password again to confirm it.

- 6. (Optional) Click **Save Online** to save the newly created signature to Foxit ConnectedPDF Web Services, which allows you to sign documents.
- 7. Click **Save**. The cursor will be changed into a shape with the appearance preview of the signature.
- 8. Place the cursor to the position you want to sign and click. Click the signature, and it will be highlighted with a red rectangle. You can move the signature by dragging the rectangle to other places. You can also resize it by clicking and dragging the handle in the lower right corner of the rectangle. When you click the signature, a gray toolbar appears over the rectangle. Click and to switch among different signatures if any; click the invert triangle to drop down the context menu.
- 9. (Optional) Click Predefined Text > Set Predefined Text to define text that can be integrated in the signature. Using the Typewriter command and the predefined text, you can quickly add some static information (like the full names of the signature owner and the company) which can be integrated in the signature. Flatten the document when applying the signature to prevent the information from being edited. By default, the identity information has been saved as predefined text.
- 10. Select **Place on Multiple Pages** from the context menu to place the signature to multiple pages.
- 11. To apply the signature to the document, click the rectangle and the invert triangle or right-click the signature, and select **Apply Current Signature** from the context menu. You can apply all signatures in the document by clicking **Apply All Signatures**. A dialog box will pop up when you click **Apply All Signatures** for the first time to prompt you that applying all signatures will flatten the whole document. You can change the settings by clicking **Change Setting** in the dialog box, or clicking the invert triangle in the signature palette and choosing **Setting**, or directly navigating to **File** > **Preferences** > **PDF Sign**.
- 12. Click the **Close** button to exit the **PDF SIGN** tab.

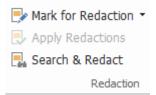
**Note**: Once applied, the signature can no longer be edited or deleted.

To manage the created signatures, do the following:

In the **PDF SIGN** tab, click  $\vec{\tau}$  on the lower right corner of the signature palette and choose **Manage Signature** from the drop down menu. In the **Manage Signature** dialog box, you can create, move and delete the created signatures, and set password for them.

## Redaction (Available in Business Only)

The Redaction feature allows you to remove sensitive information from your document prior to making it available to others. You are able to mark the text or graphics for Redaction first, and then apply the redaction.



**Note:** This operation cannot be undone and the selected content will be removed permanently when you select Apply. It is recommended that you save a backup copy of this document before you apply the redaction.

#### **Sanitize Document**

Foxit PhantomPDF supports the removal of hidden information that is private or sensitive for users from their PDFs, generally including metadata, embedded content, attached files, and scripts.

To remove hidden information from PDFs, please go to **Protect > Hidden Data > Sanitize Document**.

#### Generate Redacted and RMS-protected PDFs (Business Only)

Foxit PhantomPDF enables users to generate a redacted and RMS-protected PDF from an existing PDF. Authorized users are granted access to view the full document while unauthorized users are only able to view the redacted document, which allows for improved sharing of non-sensitive information within a protected document.

To generate a redacted and RMS-protected PDF, please do the following:

- Mark the text for redaction.
- Click **Protect** > **Redaction** > **Protect Redactions** , log on your RMS server and then choose an RMS template to encrypt the document.

## ConnectedPDF

Foxit ConnectedPDF allows each PDF to carry an identity assigned by the cPDF cloud service, and tracks all the events on the PDF like creation, distribution, and modification. So no matter where the ConnectedPDF document goes, how many distributions and modifications done to it, the document owner can always track the document in real time and collaborate with the document viewers involved. Therefore, ConnectedPDF connects files, people, location, and systems together

while ordinary PDF is separate and static.

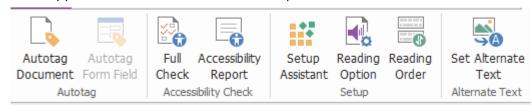
The **Connect** tab in Foxit PhantomPDF toolbar provides powerful and easy-to-use commands to create, protect, and track the access to Connected PDFs. You can also start and join a shared review on Connected PDFs without any server anytime anywhere. The detailed features include:

- Convert PDF to ConnectedPDF
- Convert other formats to cPDF when creating to PDF
- Configure open messages which appear when other users open a ConnectedPDF document (Business only)
- Clone a document (Business only)
- Enable document enforced tracking (Business only)
- Track any access to cPDF documents
- Show usage data in document homepage
- Register and upload a new version of cPDF document
- Send update notification when registering a new version (Business only)
- Share a file by generating a file link and sending it via email or to social media
- Online ConnectedPDF protection (Business only)
- Permission configuration
- Dynamically approve and revoke document permission
- Dynamically request document permission and response to the changes of document permission
- Connected shared review without having to set up a shared folder
- Document locator and request

For more information about ConnectedPDF, please refer to ConnectedPDF User Manual.

# **Accessibility**

Foxit PhantomPDF provides accessibility features to give users with disabilities (such as visually impaired people) greater access to information and technology. With commands in the **Accessibility** tab in the ribbon and the panels related to accessibility in the navigation pane, you can check the accessibility of PDFs, fix accessibility issues, edit document structure, and set accessibility preferences to make PDFs and the setup more accessible.



The Accessibility Tab in Business Edition

- Accessibility check and fixes
- Accessible reading and navigation
- Create accessible PDFs (Business only)

## Accessibility check and fixes

Use the **Full Check** command to check whether a PDF is compliant with accessibility standards of Web Content Accessibility Guidelines (WCAG) 2.0. You can choose which kinds of accessibility items to check for and how to view the results. When the check is completed, the **Accessibility Check** panel automatically expands in the navigation pane to display the check results, then you can right-click an item and choose one of the options from the context menu to deal with the accessibility issues.

To view the accessibility report, you can click Accessibility > Accessibility Checker > Accessibility

**Report** or directly click the **Accessibility Report** panel in the navigation pane. The report includes the name of the PDF document, **Summary** of the result, and **Detailed Report** for each checking option. **Detailed Report** clearly lists the rule name, status, and description for each checking option. You can click the links in the report to view the online Help on fixing accessibility issues.

## Accessible reading and navigation

Foxit PhantomPDF allows you to set accessibility preferences that control the document colors, document display and reading order, and provides keyboard shortcuts, which are good for visually impaired and motion-impaired users to better read and navigate PDFs with or without assistive software/hardware.

Use the **Setup Assistant** command and follow the onscreen instructions to set accessibility preferences and the **Reading Option** command to change the reading settings for the current document like reading order and mode.

The reflow view allows users to read documents on a mobile device or even a screen magnifier without scrolling horizontally to read text by presenting pages as a single column that is the width of the document pane. To read PDF in reflow view, choose **Home** > **View** > **Reflow**, or choose **View** > **Document Views** > **Reflow**.

# Create accessible PDFs (Business only)

Accessible PDF documents have content and elements including searchable text, alternate text descriptions for images/interactive form fields, reading order, and document tags, to enable people with disabilities to work on them with or without screen readers or other assistive software/hardware. Foxit PhantomPDF provides commands to help make your PDF accessible by tagging PDFs and form fields, setting alternate text, and editing tags.

You can use the **Autotag Document** command and the **Autotag Form Field** command to quickly tag PDF documents and form fields. You can view the tags created in the **Tags** panel in the navigation pane.

## **Foxit PhantomPDF Quick Guide**

To set alternate text for figures in your PDF, click **Set Alternate Text**. The alternative text of a figure can be displayed when you hover over your mouse over the figure to help you understand the figure better.

The Reading Order command helps you easily edit tags for PDFs. Click Reading Order, check Show page content groups and choose Page content order/Structure types in the dialog box in the Touch Up Reading Order dialog box, and you can see highlighted regions that are numbered or labeled with structure types in the document area. To edit tags, draw a rectangle in the page content or click the number of a highlighted region, and choose a tag type from the Touch Up Reading Order dialog box. You can also open the Order, Content, and Tags panels in the navigation pane to do more actions.

## **Contact Us**

Feel free to contact us should you need any information or have any problems with our products. We are always here, ready to serve you better.

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Website Questions - webmaster@foxitsoftware.com