

# How to create PDF file and send to a Member

January 2011

## Part 1: Confirm the Staff / Sender's email addresses are in the SOS Database

Select Administration, then List admin, then Click on Email Addresses.  
To enter a new email address, click Add New, and complete the fields shown in Red.  
When done, click Accept.

The user name should be the same as the SOS User name.

Name	Email
Leonard Ansin	lansin@ansintech.com
Elizabeth Ashton	eamashton@orga.com
Michael Goldberg	michael@tebh.com
Sarah O'malley	sarah@aol.com
John Salwen	jsalwen@comcast.net
Olivier vogel	oliviervogel@hugoboss.com

**Data Entry is Required for Fields labeled in Red**

**First Name**  
Leonard

**Last Name**  
Ansin

**User Name**  
Leonard

**Email Address**  
lansin@ansintech.com

**Position**  
TS

Web Email Administrator  
(Listed Email address is Recipient Email from Web)

Add New  
Update  
Delete  
Print  
Close

## How to create PDF file and send to a Member

### Part 2: Be sure the SMTP name is entered in program Administration.

Please note: The SMTP name is entered in Program Administration:

- 1: From the General Family Screen, select Administration
- 2: Then click Program Administration
- 3: Click Database Connection
- 4: The SMTP name or number is entered in the SMTP Name field.

(Check with your network administrator for further assistance)

Enter the SMTP name as provided by your Tech Support staff.

If hosted by ATG, the SMTP name will already be taken care of.

The screenshot shows the 'PROGRAM ADMINISTRATION' window with the 'Database Connection' tab selected. The window is divided into three main sections: Administrator Information, Database Setup, and Email Setup. The Administrator Information section includes fields for Salutation, Full Name, Position, Organization, Address, City, St, Zip, Telephone, and Fax. The Database Setup section includes fields for Computer Date, SOS Database Files, and a time field. The Email Setup section includes fields for SMTP Name, IP Address, SMTP User Name (Max 50), and SMTP Password (Max 50). An arrow points from a text box on the left to the SMTP Name field in the Email Setup section.

Administrator Information	
SOS Serial Number	11-333-555-777
Salutation	Very truly yours,
Full Name	YES NO
Position	President
Organization	Fund Raising
Address	5725 Walnut Lake Road
City, St, Zip	Boston, MA 02666
Telephone	617-555-1000
Fax	617-555-1001

Database Setup	
Computer Date	02/09/2006
	10:33:53 PM
SOS Database Files	P:\sosstdb

Email Setup	
SMTP Name	192.168.1.2
IP Address	
SMTP User Name (Max 50)	
SMTP Password (Max 50)	Occupation

# How to create PDF file and send to a Member

## Part 3: Create the PDF file:

Whenever you run a report and click Print Preview, the report is rendered to the screen. On the right side of the screen, you'll see a series of buttons. Click on the Print Special Button.

The screenshot shows the 'SOS Statement' application window. The main area displays a 'Statement' for 'Members Fundraising' dated 04/25/2007. The statement includes a table of account descriptions, invoice numbers, dates, and amounts. A 'Print Special' button is circled in the control panel on the right side of the window.

Account Description	Inv #	Inv Date	Total Billed	Due by	Payments	Adjust- ment	Current Due
Dues 07-08	1449	04/02/2006	1,175.00	05/02/2006	957.57	.00	217.43
School Fees	2267	06/25/2006	1,255.00	06/05/2006	.00	.00	1,255.00
Local Religious School	2338	06/22/2006	577.75	07/22/2006	.00	.00	577.75
MEMBER DUES 07	594	05/01/2006	1,277.99	11/28/2006	.00	.00	1,277.99
Final Assessment	2453	12/13/2006	250.00	01/12/2007	.00	.00	250.00
School 06-07	1818	05/04/2006	775.00	02/01/2007	200.00	.00	575.00
CJP Fund	877	03/24/2007	7,000.00	04/16/2009	701.00	.00	125.00
CJP Fund	878	03/24/2007	5,000.00	04/16/2010	.00	.00	.00

Payments Details: (All Payments made within 30 days PRIOR to the date of this statement.)

Payment Description	Inv #	Date	Amount	Method
School 06-07	1818	04/06/2007	100.00	CH 777

# How to create PDF file and send to a Member

**Part 4:** The following screen will appear:

The screenshot shows the 'SOS Special Print Setup' dialog box. It has a title bar with 'SOS Special Print Setup' and a 'Help' button. The main area is divided into several sections:

- Select the available paper bins:** A dropdown menu showing 'Use Paper from the upper bin'.
- Select from available paper sizes:** A dropdown menu showing 'Letter, 8 1/2 X 11 inches'.
- Set Drive, Folder and File name to save as PDF document:**
  - Available Drives:** A dropdown menu showing 'c: [DISK2\_V...]'.
  - Available Directories:** A list of folders: 'C:\', 'SOSprojectNew', 'SOSCashReceipts' (highlighted), and 'UserLogs'.
  - Enter File Name:** A text box containing 'MemberList'.
  - PDF File will be stored here:** A text box containing 'C:\SOSprojectNew\SOSCashReceipts'.
  - Create PDF file:** A checked checkbox.
- Start Page:** A text box containing '1'.
- Last Page:** A text box containing '11'.
- # Copies:** A text box containing '1'.
- Buttons:** 'Print' and 'Close'.

Callout boxes provide instructions:

- Box 1: 'Enter the File name that best represents the contents of the report. Do not add any file extension.' (points to the 'Enter File Name' field).
- Box 2: 'Click the Create PDF file option. Once you click Print, the PDF file is automatically created.' (points to the 'Create PDF file' checkbox and the 'Print' button).
- Box 3: 'Use the Available Directories option to navigate to the folder to save the PDF file in. Please be sure to make a note of the folder name because you'll need it to send the file as an attachment.' (points to the 'Available Directories' list).

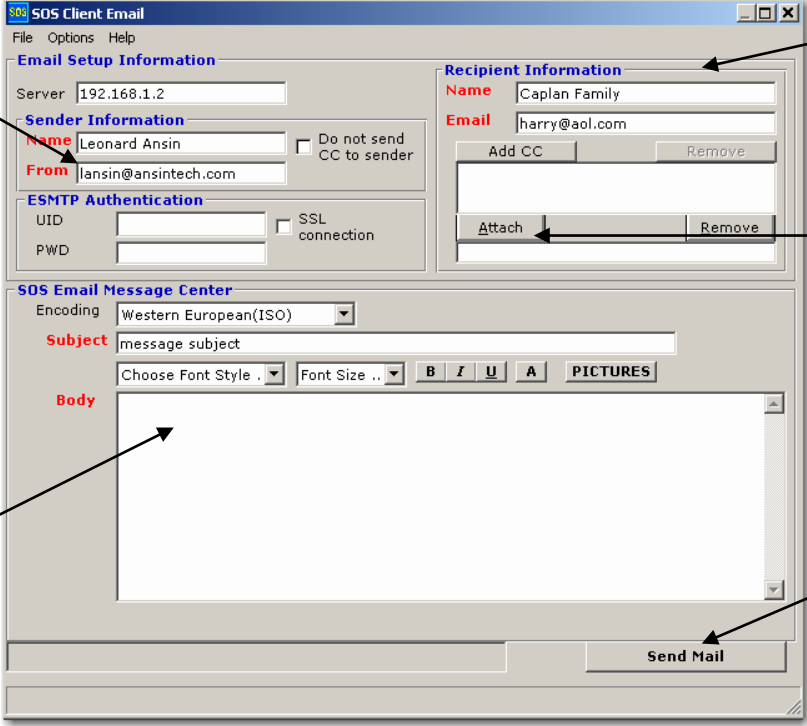
## **Write down the full path name and file name entered**

Please note: Once you click Print, the Folder name is stored and will be displayed the next time this option selected.

## How to create PDF file and send to a Member

### Part 5: Email the file to a member's email address in the SOS database.

- 1: Use the Member list, to search for the member that you want to email the file to that was created in Part 3.
- 2: On the General Family Screen or the Family Member screen, click on the send button next to the email address (The Member's email address must be in the SOS database)
- 3: In the email window the default sender email address is for the current SOS user. (SOS User email addresses are for staff and are entered in List Admin)
- 4: Click on attach and navigate to the folder you wrote down in step 3 above. Click on the file and select open.
- 5: Then enter a message and click send mail at the bottom of the window. The file will be sent as an attachment.



The sender's name and email address is automatically populated based on the current SOS user.

Sender's name and email address and entered in Acct List Admin. See Step 1

Enter a Subject and Text of the email here

The recipient's name and email address is automatically populated.

Click Here to Add the Attachment that was created in Step 3

When Complete, click here to Send Mail.

The screenshot shows the 'SOS Client Email' window. It has a menu bar (File, Options, Help) and several sections: 'Email Setup Information' with fields for Server (192.168.1.2), Sender Information (Name: Leonard Ansin, From: lansin@ansintech.com), and ESMTP Authentication (UID, PWD, SSL connection). 'Recipient Information' shows Name: Caplan Family and Email: harry@aol.com. There are 'Add CC' and 'Remove' buttons. An 'Attach' button is highlighted with a callout. The 'SOS Email Message Center' section includes an Encoding dropdown (Western European(ISO)), a Subject field (message subject), and a Body text area with a rich text toolbar (Choose Font Style, Font Size, Bold, Italic, Underline, Align, Pictures). A 'Send Mail' button is at the bottom right.

#### Caution:

Some recipient's email service or software may not accept any attachments, such as PDF files. You should check with the recipient to be sure they received the file.

FYI: In your SOSprogram folder, a file called SMTPSingle.Log is created, each time an email is sent. You can open this file, with a simple text editor, to check for any special messages such as incorrect email address.

## How to create PDF file and send to a Member

---

SOS continues to be enhanced through user comments and ideas. Please email your suggestions to [SoSSupport@ansintech.com](mailto:SoSSupport@ansintech.com)

**Ansin Technology Group, Inc © 2011 All rights reserved  
Proprietary and Confidential information**

Email support: [SoSSupport@ansintech.com](mailto:SoSSupport@ansintech.com)