

How to export a Yahrzeit List and email the text file to a Member in the SOS Database

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How to export a Yahrzeit list and then email the file to a Member in the SOS Database.

Please note:

The export text file that is created is in a Standard Tab delimited format.

Part 1: Create the text file in SOS

- 1: From the General Family screen, select Management, then Yahrzeit List.
- 2: Once the Yahrzeit List is opened, select the Yahrzeit List Tab
- 3: Select either Civil DOS Month / Day Range, Hebrew Yahrzeit Date Range or use the option in the lower right corner (Select Civil and Hebrew Date Range) then click on Refresh Yahrzeit list. This will give you a list of all deceased people with the selected date range.
- 4: Select the Yahrzeit Notifyees tab, select the Show Notifyees to be notified, enter the observe from date to date, then select Refresh Notify List.
- 5: Select Yahrzeit Printing Button. Then under print What, select Notifyees, Select in Export to File Yes, then select a location to save the file and enter a file name without any extension. Then click continue

(The same process applies if you just want to email a Yahrzeit List and not Notifyees.)

Write down the full path name and file name entered.

Please note: the default export folder is set per user as follows:

- 1: From the General Family Screen, select Administration
- 2: Program Administration
- 3: Click on Accounting Connection
- 4: Enter a the default folder, in the field "Default Export Folder"
(be sure to click update when done)
- 6: Once you are back at the Yahrzeit printing screen, click on print preview. This will give you a listing of the Notifyees and at the same time export the data to the file and location that you previously selected. (This is a requirement in order to create the file.)
- 7: Once the print preview is complete, you can then email the file to a Member.
- 8: Once the details are on the preview screen, then click close. Part 1 is complete.

Part 2: 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 1.
- 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 database)
- 3: On 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 5 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.
- 6: Part 2 is now complete.

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)

SOS continues to be enhanced through user comments and ideas. Please email your suggestions to SoSSupport@ansintech.com or SoSrequest@ansintech.com

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