



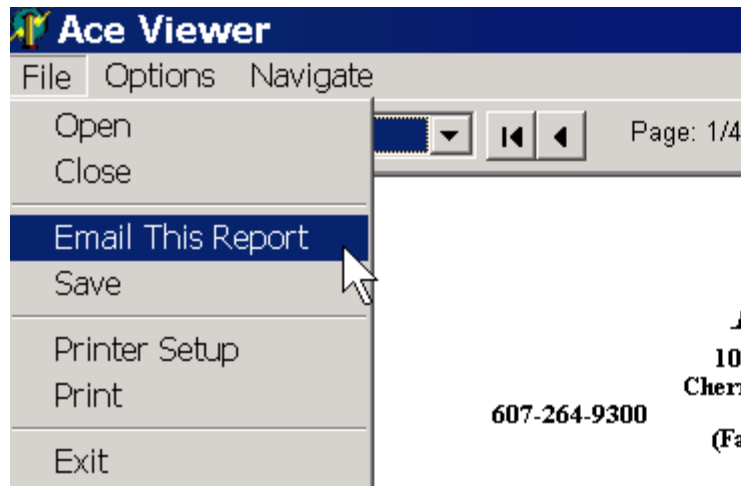
E-Mail Direct with File Export

This module has something for everyone on staff. With this module installed you will now see a File Save Icon on the screen print of any report. 1 click, and you can export the file as a .pdf, .xls or .rtf file.

The sales department will like the ability to e-mail charter confirmations & quotes. Now you can send an industry standard Adobe Acrobat® PDF files to customers via e-mail. This allows your invoices and confirmations to maintain the company graphic design, with the added security of PDF formatting (customers can't change the invoice amounts as with a regular e-mail or word document.) This E-Mail-direct feature uses standard E-Mail distribution software that allows you to write a cover letter to the .pdf attachment. The module also deploys an automatic naming convention for files confirmations & invoices that are emailed to help keep you organized.

The accounting department can now export data from RBS accounting reports to spreadsheet and rich text formats for analysis or inclusion in corporate wide reports.

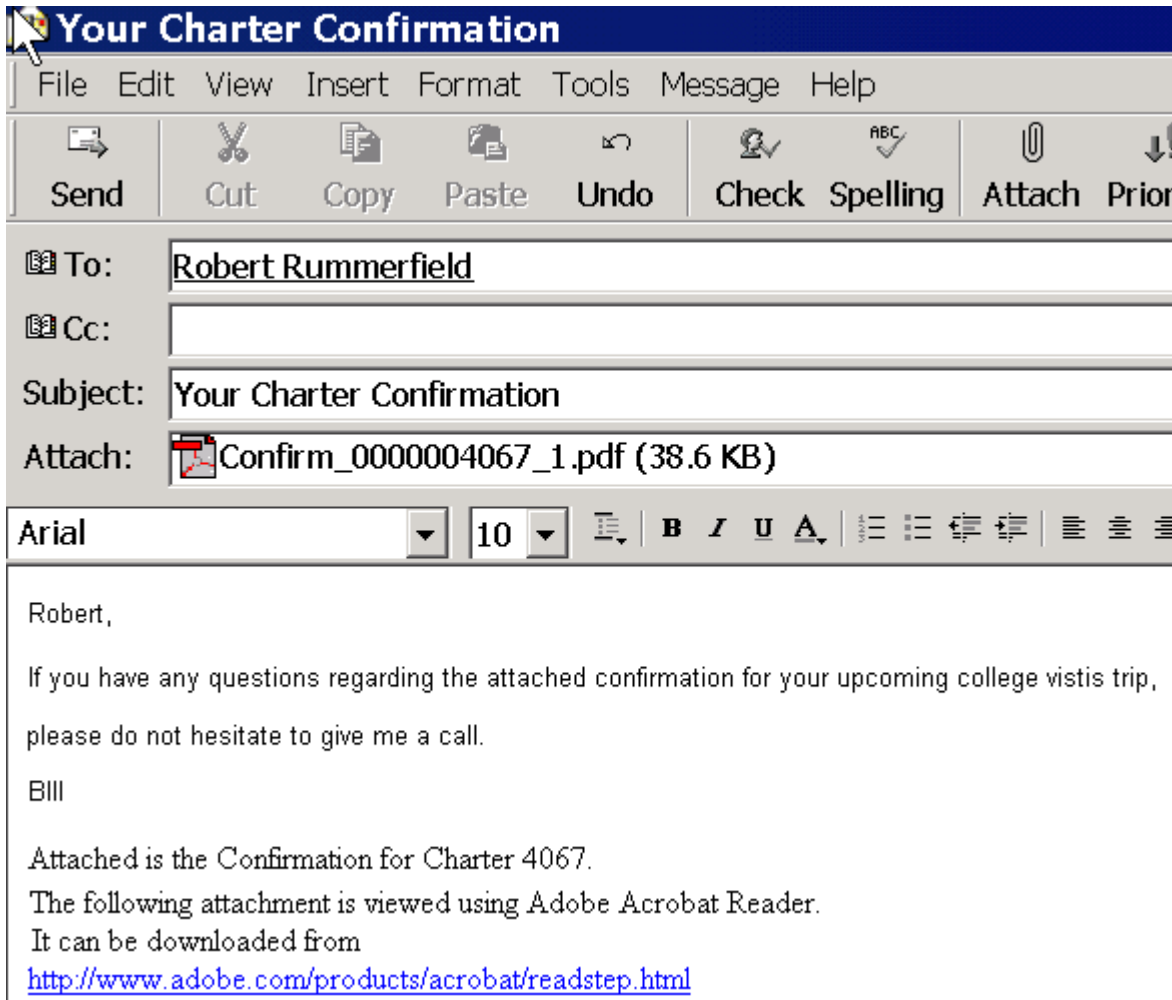
E-Mail Direct



To email any of the documents, select **Print to Screen** and then select **Email This Report** from the **File** pull down menu.

To send a report through e-mail, or save the report to a file, simply select the report as normal and select **Print to Screen**. Then on the **File** menu, select **Email this Report**. Once selected, the GoChart2000 opens your MAPI compliant e-mail program. (To ensure compatibility a current version of Microsoft Outlook or Outlook Express recommended)

An Adobe Acrobat PDF version of the document is automatically attached. If the customer has an email address on file in the GoChart2000 customer list, it is automatically inserted as the recipient. You can ask for a confirmation receipt, attach other files and manage this mail through the normal features of your default email client.



RBS TOLL FREE SUPPORT **1-800-448-7001** **9:00am to 5:00pm EST.**
RBS FAX FOR SUPPORT **1-607-264-8070**
E-mail: **support@rbs2000.com**
Website: **http://www.rbs2000.com**

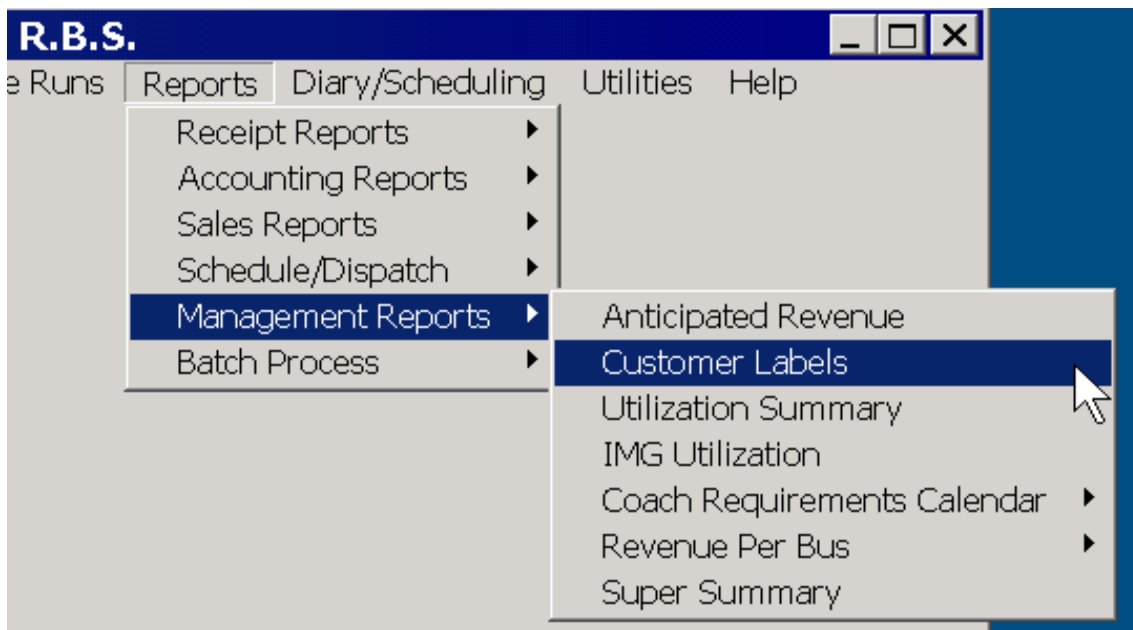
File Export

Included with the email client is a module that lets you export any report in Gochart2000 to a Microsoft Excel® (xls), Adobe Acrobat® (pdf) or Microsoft Word® (rtf) compatible file.

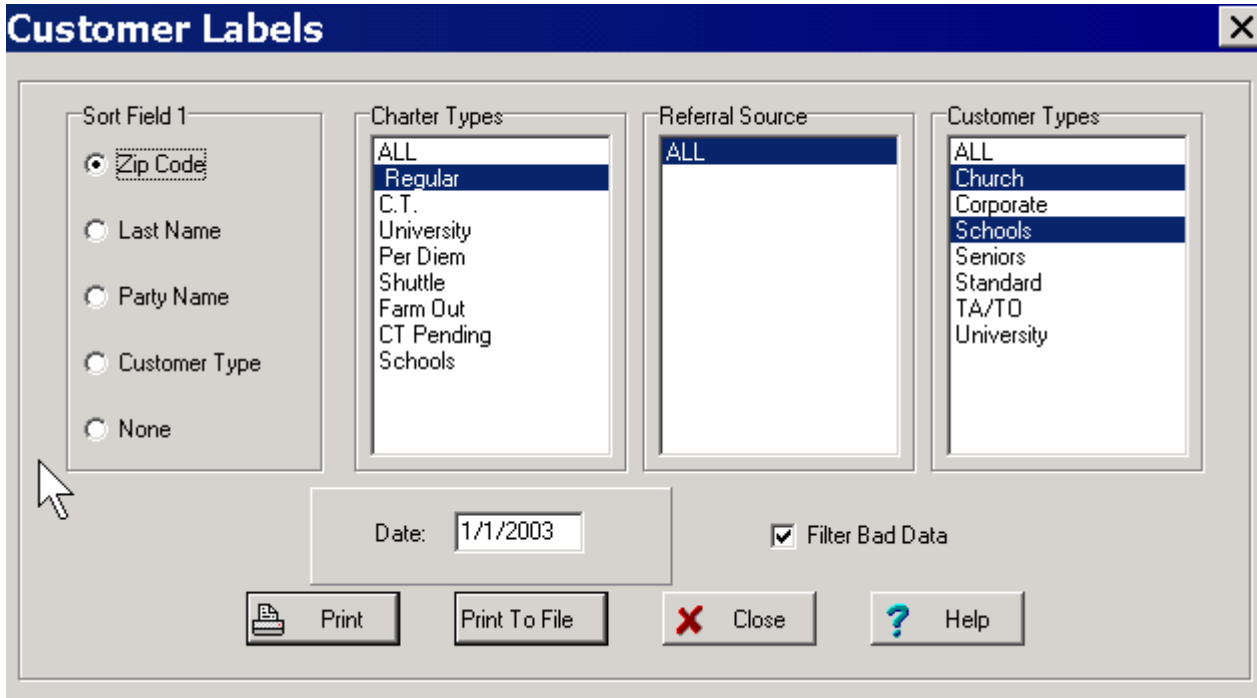
Some column based reports like like accounting and sale reports orient themselves to spreadsheet export. Other more free form reports like dispatch reports lend themselves better toward export to .pdf format and attachment to email for distribution.

Some reports we have put in a spreadsheet friendly format: ie. one line per record. The following is an example of this for customer labels.

To access this report select the **Reports** menu, then **Management Reports**, then click on **Customer Labels**.



You can use the Customer Label “query engine” to select the the sub-set of customers to print / export. Select ALL in each category for the entire list.



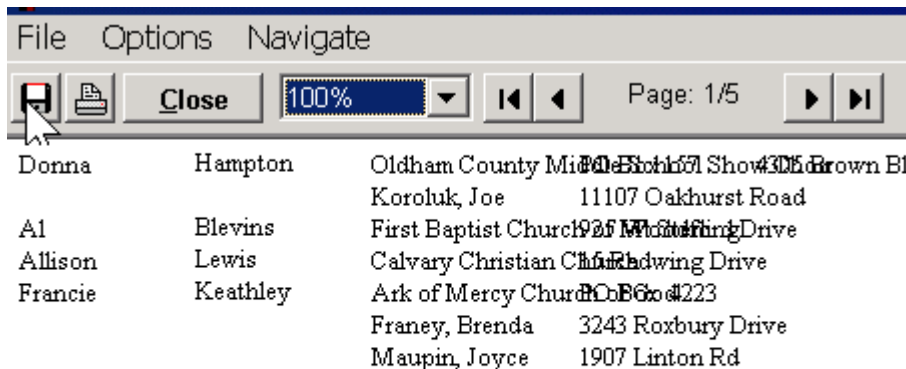
In this example we are going to get a subset of all customers who are customer type Church and School and have charters of the type Regular since the date 1/1/2003.

Tip: to select multiple items on a list, hold the ctrl key while selecting.

If **Filter Bad Data** is checked, customers without City, State or Zip Code are not included. If you select **Print**, 3-across, 10-down mailing lables (Avery 5160) are printed.

Now, we select **Print To File** for spreadsheet friendly output. Select **Print to Screen** and click **Print** . This does not look correct on-screen, but is translated into xls format.

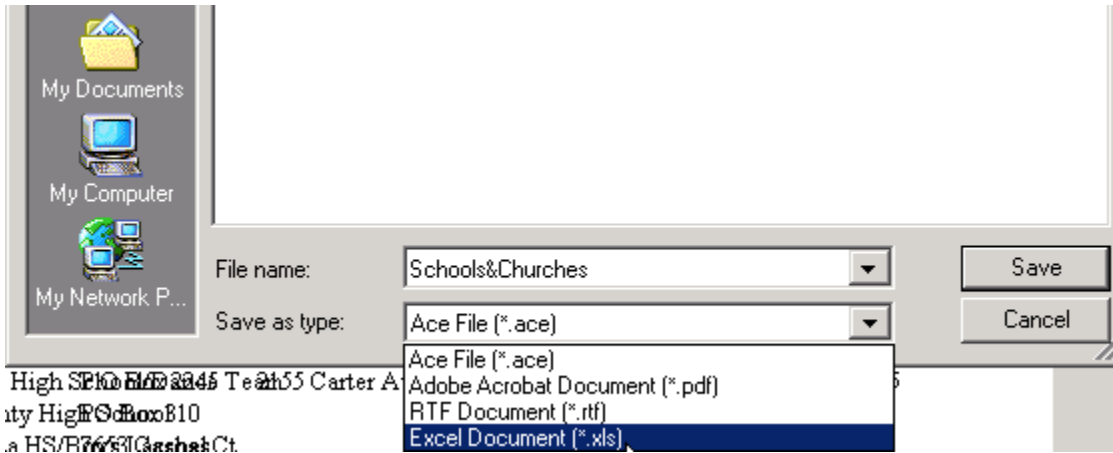
Select the **File Export** icon, the little disk picture at the top left corner of the tool bar.



Now you are presented with a standard windows file **Save As** dialog box.

Select the location where you want to put the report using the controls on the top tool bar and name and file type using the controls at the bottom.

Tip: You can create a folder on your computer called “GoChart Reports”. This way you can keep to keep all output from GoChart2000 in one place.



The data should transfer cleanly to a file that can now be opened using Microsoft Excel.

Microsoft Excel - Schools&Churches.xls

File Edit View Insert Format Tools Data Window Help

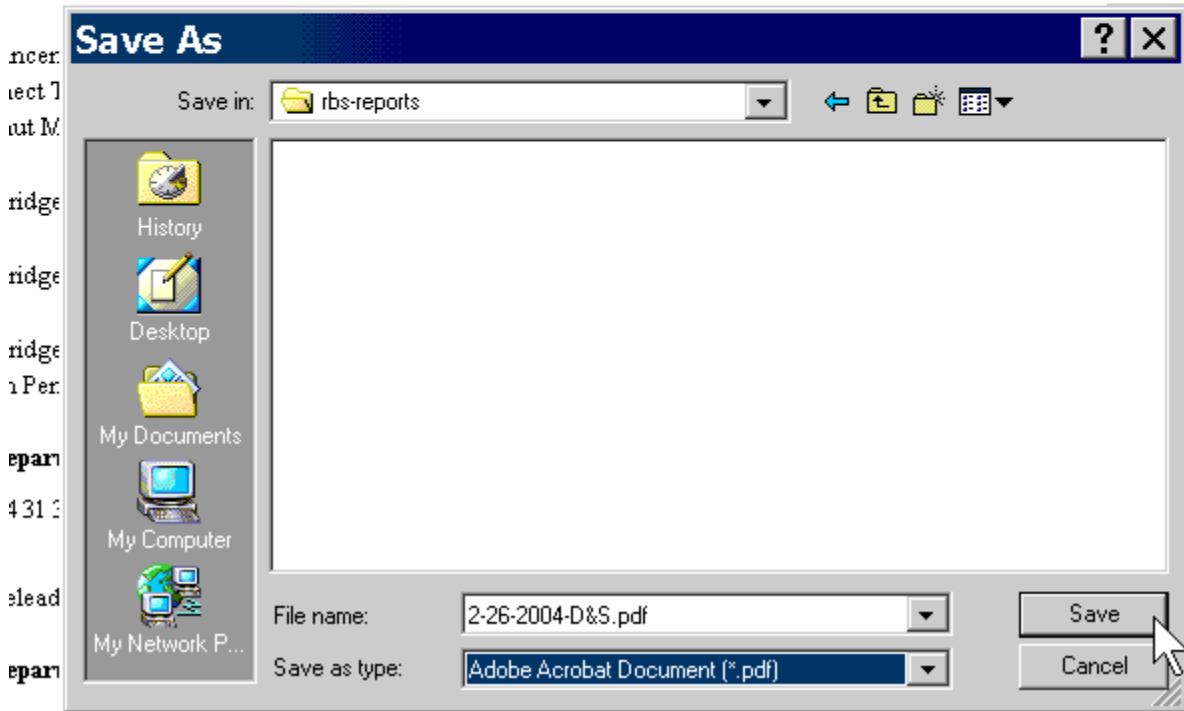
Times New Roman 10

	A	B	C	D	E
1	Donna	Hampton	Oldham County Middle School Show Choir	PO Box 157	4305 Brown E
2			Koroluk, Joe	11107 Oakhurst Road	
3	A1	Elevins	First Baptist Church of Mt Sterling	925 Woodford Drive	
4	Allison	Lewis	Calvary Christian Church	15 Redwing Drive	
5	Francie	Keathley	Ark of Mercy Church of God	PO Box 4223	
6			Franey, Brenda	3243 Roxbury Drive	
7			Maupin, Joyce	1907 Linton Rd	
8	Jennifer	Chandler	Great Crossing Missionary Baptist Church	469 Locust Avenue	

In this example, the Diary / Scheduling report is being saved as an Adobe Acrobat® (pdf).

R.B.S.
Diary and Scheduling Report
Thursday, February 26, 2004

Name	Driver	At Garage	PickUp	Spot	Destination
r Ready	5091 Kulp *			**RETURN**	Pittsburgh PA area
am Penn Charter Schc	8818 Derstine,*	5:30	William Penn Charter S	7:15	Washington DC area



This document is intended as a guide to E-Mailing and Exporting within the GoChart program. If while using these functions you encounter a problem, or if you have any questions, please do not hesitate to contact us.

Thank You
RBS Support Staff

RBS TOLL FREE SUPPORT
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Website:

1-800-448-7001 **9:00am to 5:00pm EST.**
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