How to E-mail a Report or Form from the Pontem® Software Report Preview

PRINTING A REPORT OR FORM

On the menu bar, click **Reports**, click the appropriate topic, and then select the report you wish to run.   **NOTE:**   You may also select any item from the **Reports** tabs in the various workspaces.

When the filter form appears, enter the criteria to filter upon. When you have defined the search criteria, click the **OK** button to run the report.

EMAILING ANY REPORT

All reports within Pontem's software products can be e-mailed to another individual. This feature enables sharing of report documentation with auditors, board/council members, or co-workers.

STEP ONE: Preview the Report

After running any report, a 'Report Progress' window will appear, showing the total number of records included in the report, and the records being processed to compile the report.

Once the report is compiled, a 'Print Preview' window appears, displaying the first page of the report.
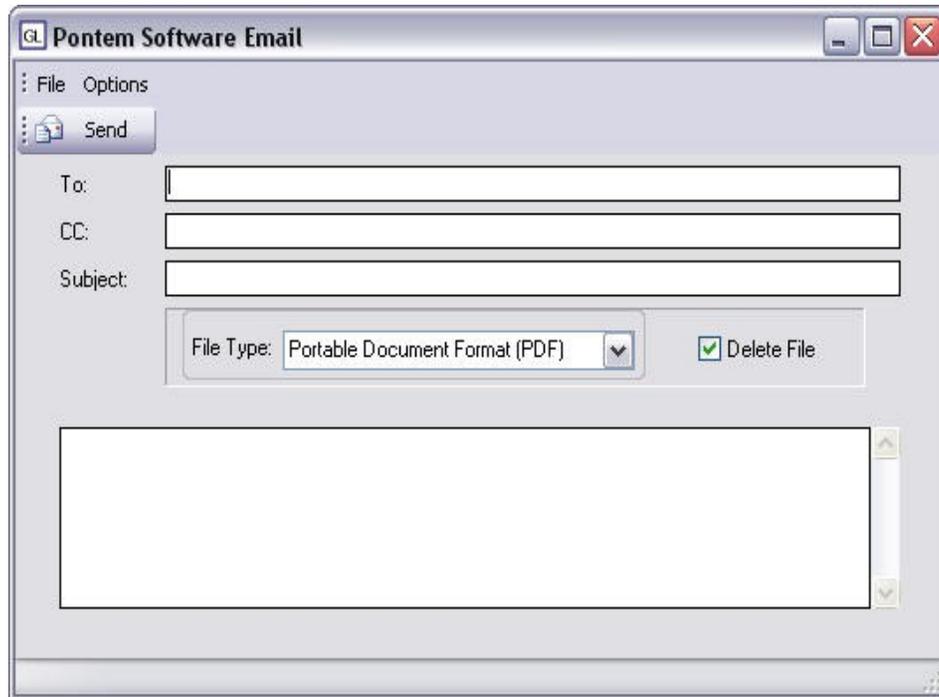
STEP TWO: Verify the Report and Select Email Option

Verify the report contains the desired information. Then click the **E-mail** icon in the menu bar to display the 'E-mail' window:

STEP THREE: Addressing and Sending Your Emailed Report

The 'Pontem Software E-mail' window will now appear:

1. Type the E-mail address of the person you wish to send the E-mail, in the field labeled **'To:'**

If you would like to send a Carbon Copy of your email to someone, type the E-mail address of this person in the field labeled '**CC:'**

2. Type the subject for the E-mail in the field labeled '**Subject**..'

3. Click the **FileType** drop-down menu and choose the desired file type.

NOTE: Sending the file as a Portable Document Format (PDF) will ensure recipients cannot edit or revise your report.

If you would like to delete the e-mailed file from your hard drive after sending the e-mail, check the **Delete File** checkbox. If you would like to keep the e-mailed file on your hard drive, uncheck the **Delete File** checkbox.

4. Click the **Send** button to send your e-mail.

NOTE: This process will not print the report on paper, it will only e-mail it to the recipient you select.

Technical Support...

If you require additional assistance in emailing a report or form from within your Pontem software please don't hesitate to contact a member of our Support Team. Our goal is to help you get the most out of your Pontem Software investment. We would be happy to help.

Pontem Help Desk

Call **888.237.8531** toll-free

Submit an online support request at: http://www.pontem.com/Support-1

Email: support@pontem.com