

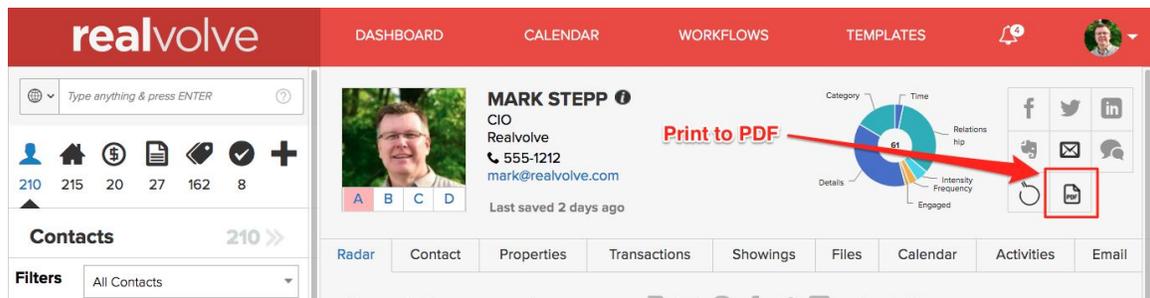
Print to PDF

Training

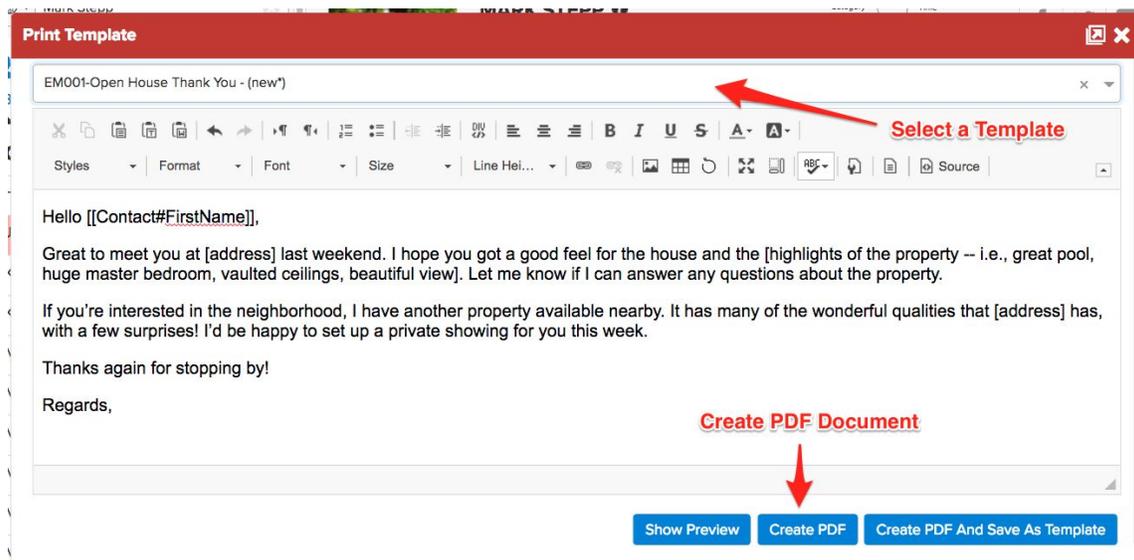


While Emailing is the dominant method of communication these days, many users still want to send a printed letter at times. The PDF icon allows templates to be created as PDF documents and printed for individuals or groups of contacts.

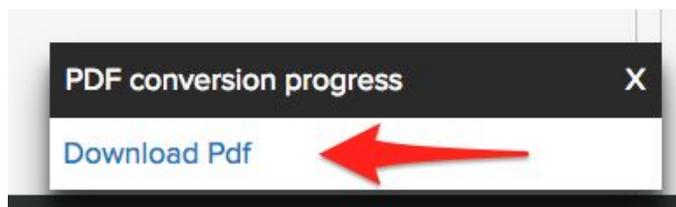
- 1) From an Individual contact simply click on the **Print to PDF** icon.



- 2) Select a Template then click on Create PDF.

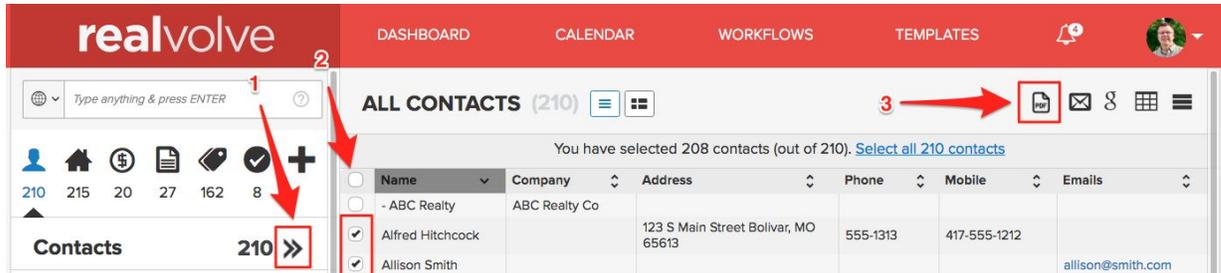


- 3) Click on the "Download Pdf" link from the popup at the bottom of the screen to open the pdf file. This window only displays for a short period of time. If you miss the your opportunity then look in the files tab of the contact to select the file and print it.



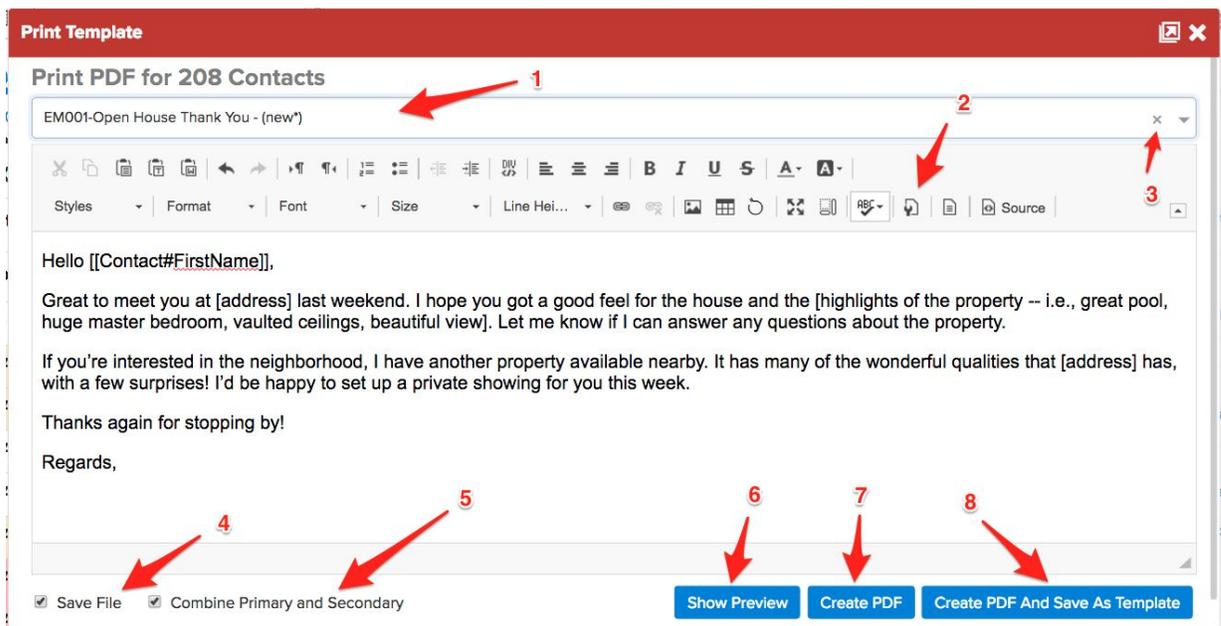
In addition to printing from individual contacts, Realvolve also has the ability to print groups of contacts from the 'View All' screen.

- 1) Click on the View All Chevrons.
- 2) Select a group of contacts.
- 3) Click the Print to PDF button.



This will display a similar 'Print Template' window with a few additional options.

- 1) Select the template to print.
- 2) Option to change Top, Bottom, Left & Right Margins on Enhanced Template Editor Only.
- 3) Remove the selected template and create a new template.
- 4) Save a copy of the individual PDF letter to the files tab of the selected contact.
- 5) Combine Primary and Secondary to prevent 2 copies printed for Husband/Wife contacts where both were selected.
- 6) Creates a Preview of the first contact to see what it will look like.
- 7) Create the PDF and close the popup window.
- 8) Create the PDF as a new Template or update the current template if changes were made.



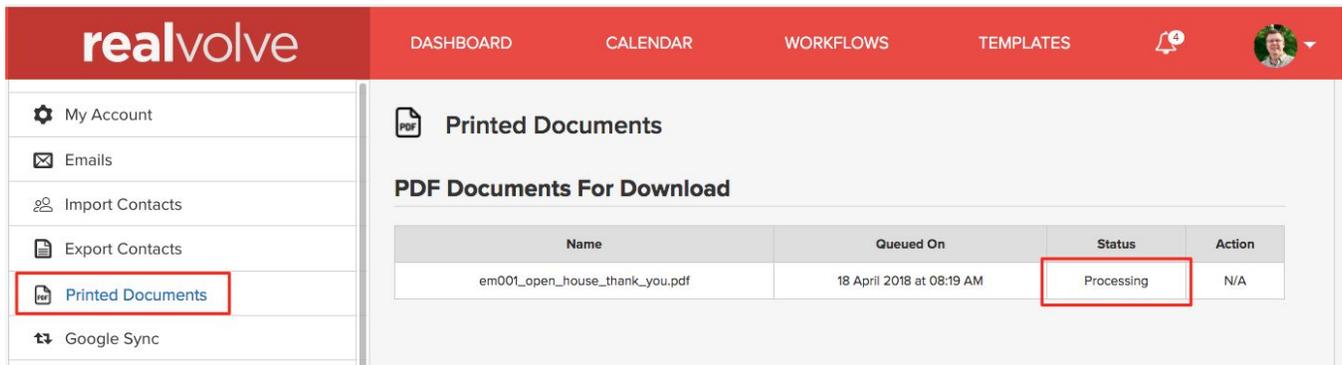
IMPORTANT:

If you get a popup blocker warning then you will need to change your browser settings to allow popups from your Realvolve subdomain to display the PDF document.

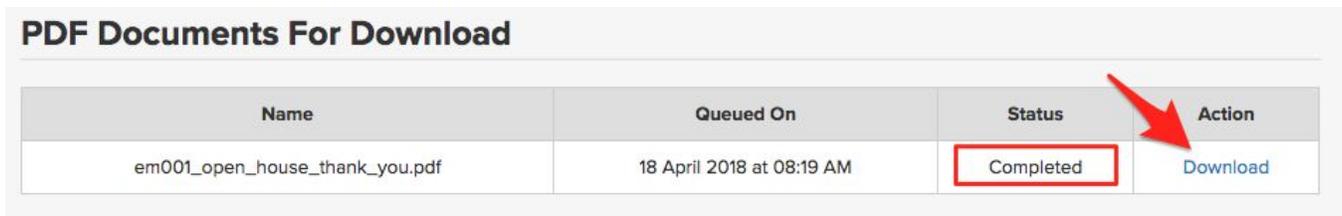


Once the PDF is create you can click on the Download link that displays for a short time at the bottom of the realvolve screen or you can go to **SETTINGS > PRINTED DOCUMENTS** to see a complete list of all PDF documents that were created from the View All or Tags View screens.

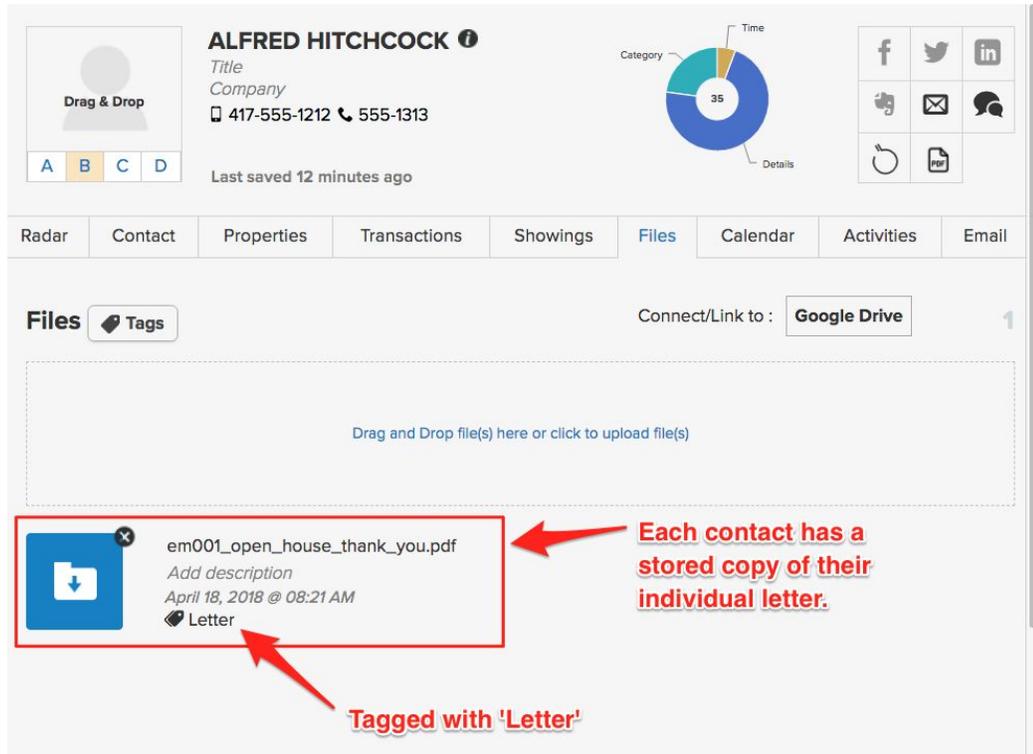
When printing a lists of contacts, the system compiles all the letters in a single PDF document which can be easily printed. This process can take time for a large number of contacts and you may see a 'Processing' status until it is complete.



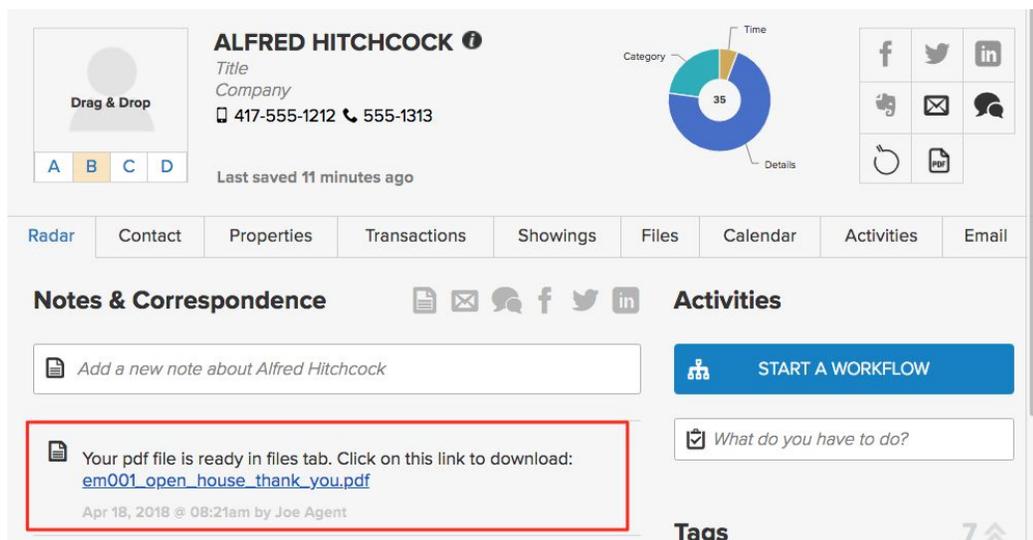
Once the PDF has been completed you can click on the "Download" link to access the document and print all the letters at one time.



Each time a PDF is created, a copy of the document is stored in the 'Files' tab of the contact and tagged with 'Letter'. If the PDF was created from a list of contacts, only the individual page for that contact is stored.



A link is placed in the notes & correspondence section of the Radar tab.



Questions?

Please direct questions and comments to support@realvolve.com

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