



## Connecting to a Remote Desktop

*This document provides step by step instructions on how to connect to a computer running CharityMaster. The instructions are based on a Windows 10 computer but the instructions for previous versions of Windows and for Macs are similar. Of course, you will not be able to connect unless you have an account on the Remote (target) computer and that computer has been properly configured.*

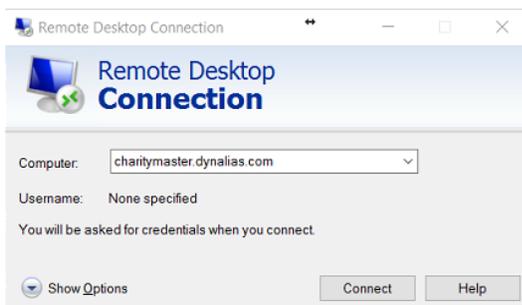
### Remote Desktop connector

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The first step is to set up the Remote Desktop software on your computer.

#### Windows computers

Open the Windows Start Menu, search for “Remote Desktop Connection”, and then click on “Remote Desktop Connection.” The following screen will appear:



Alternatively, download and install the **Remote Desktop App** from the Microsoft Store. At the time this document was written, the Remote Desktop App had a significant limitation: it does not allow you to Cut/Copy a file from one computer (the remote computer for example) and paste it onto the other computer (your local computer for example.) However, the Remote Desktop App has some nice features (automatic screen resizing, storage of multiple connections, etc.)

#### Apple (Mac) computers

Complete instructions are here:

<https://www.techrepublic.com/article/how-to-access-microsoft-remote-desktop-on-macos-sierra/>

#### Mobile devices

You can also access a Remote Desktop using an Apple or an Android device. Download the Remote Desktop app from the appropriate location.

CharityMaster has not been optimized for use on these devices. However, despite the absence of a mouse and automatic keyboard, you can look up information in your database.

## Setting up the connector

The connector has five tabs (across the top.)

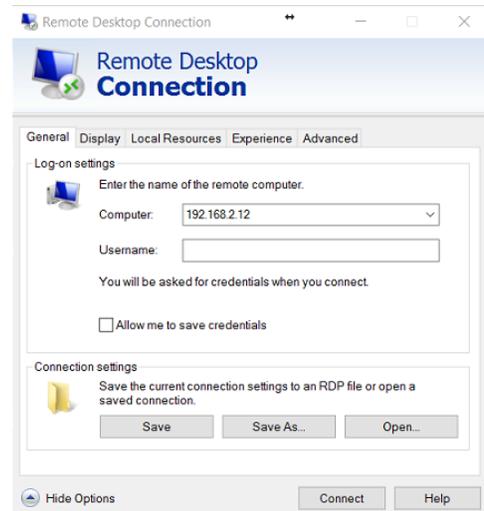
### General tab

Once the connector has been started, specify the computer to which you want to connect. Enter the domain name (if you are connecting over the internet) or the IP address (if you are connecting over a Local Area Network (LAN)).

Click the arrow next to “Show Options.”

Enter the *user* name for your account on the Remote PC.

If you are NOT using a public computer, click “Allow me to save credentials.”



### Display

You can use the default settings. We recommend that you never uncheck “Display the connection bar.”

### Local resources

We recommend that you leave the Audio settings unchanged and that you change the Keyboard setting to “On the remote computer.”

Ensure that, under Local Devices and Resources, both “Printers” and “Clipboard” are checked. When “Printers” is checked, you can create a print job on the remote computer and then send it to a printer that is set up on your local computer. When “Clipboard” is checked, you can Cut/Copy a file on the remote computer and Paste it on your local computer – and vice versa.

### Experience

We recommend that you use the default setting.

### Advanced

Use the default settings unless you are instructed to use different settings when you are connecting to CharityMaster which is running on a server.

### Return to the General tab

Click “Save As” to save a short cut to this connection. Save the shortcut on your desktop. Chose a name such as “CharityMaster” for this shortcut.

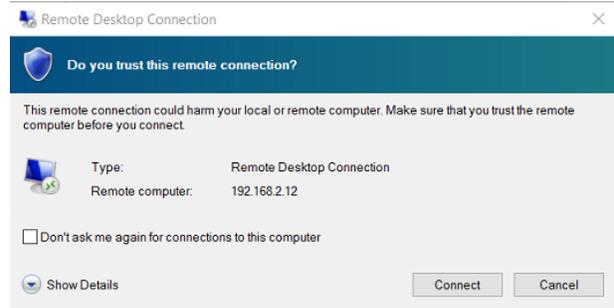
## Connecting to the Remote computer

Open the Remote Desktop **connector** and click “Connect.” If you are using the Remote Desktop **App**, open the App and then connect on the icon that represents the computer that is running CharityMaster.

You may receive a message such as the following:

What this means is that the administrator of the Remote Computer has not installed a security certificate from a public certificate authority. In this case we recommend that you proceed as follows:

- Leave the “Don’t ask me again” checkbox unchecked and press “Connect” to make a connection to the computer in question.
- If you connect successfully to the computer running CharityMaster, disconnect and then reconnect. When you reconnect, put a check in the “Don’t ask me again” checkbox because you now know that you have connected to the correct computer.



When you click “Connect” you may be asked for the password for your account on the Remote computer. Check the “Remember me” box and click “OK.”

Once again, you may receive a message such as the one on the right:

Click the “Don’t ask me again” check box and then click “Yes.”

Provided your credentials (user name and password) are correct, you will now be able to see the Remote Desktop.

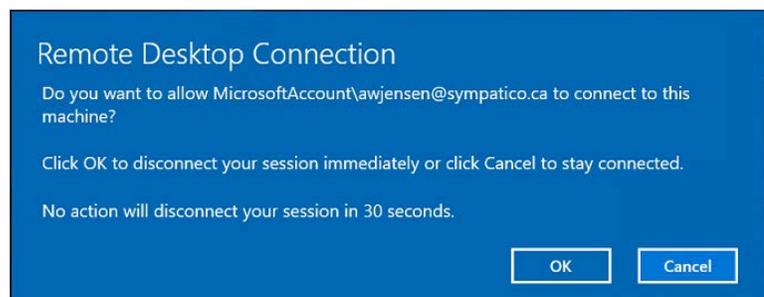
If another user is already using the Remote Desktop, you will see the following message: “Another user is signed in. If you continue, they’ll be disconnected. Do you want to sign in anyway?”



The other user may or may not be actually using the Remote Desktop. They may have left their computer and forgot to sign off! For this reason it is very important that when you are finished using CharityMaster that you log off the Remote Desktop. (See below.)

If you click “Yes,” the current user of the remote desktop will see the following message:

If the current user clicks “Cancel” you will have to try to connect again later.



## Once you are connected

Now that you are connected, you can operate the Remote Desktop the same way that you would operate your own computer. You can run any of the programs on the Remote Computer by double clicking on an icon on the Desktop or click the Start button and find the program you need to run.

## Printing

Let’s say you want to use the Bulk Mailing Wizard in CharityMaster to print a number of letters you have generated. Select the mailing list you want to use, make any required changes to the settings, select the

Word template you have modified for this mailing, and click “Create.” CharityMaster will generate the letters and Word will open. Click on the File tab in Word and click on “Print.” Note that the list of available printers has both the printers that are set up on the Remote Desktop AND the ones that are set up on the (Client) computer you are using! (Each printer set up on your own (Client) computer will have “(redirected x) beside it.) Now you can print the mail merge letters using either your local printer (one of the redirected printers) or using one of the printers connected to the Remote Desktop!

## Sound

Note that any audio output from the Remote Desktop will be heard on your (Client) computer.

## Cut, copy and paste

If you are using the Remote Desktop Connector (not the **App**), you can use the Windows cut, copy and paste functionality to move things (text snippets, files, etc.) back and forth between the Client and Remote computers.

## Switching back to your local display

You do not have to terminate the Remote Desktop session in order to be able to see the display on your own screen. When you start the Remote Desktop session you will see either a title bar at the top of the screen or a tool bar. On the title bar, click the \_ symbol and the Remote Desktop will minimize and you can work on your own screen. The connection is NOT terminated.



To return to the Remote Desktop, click on the appropriate icon in the Task Bar at the bottom of your

screen:  or .

## Concluding the Remote Desktop session

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It is important that you properly terminate your Remote Desktop session.

- Close all of the programs you have been using on the Remote computer. It is particularly important that you shut down CharityMaster since the next person who connects to the remote computer may not have the same CharityMaster security credentials as yours.
- Log off the Remote Desktop: On the Remote Desktop, right-click the Start button, click on “Shut down or sign out” and then click “Sign out.” If you do not do this step, then, to another user trying to access the remote computer, it will appear that you are still using the Remote Desktop.
- *Do NOT shut down the remote computer. The Remote computer has been set up to remain on all the time so that you or someone else can access CharityMaster after you have logged out.*

## Tutorial

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Here is a link to our “First Steps” tutorial that will get you familiarized with CharityMaster:

<http://charitymaster.com/downloadables/FirstSteps.pdf>