

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives

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Overview


This article walks through the steps to transfer files between **your local PC**, and the **Trail Blazer remote desktop** 'app server':

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives



For [Mac users](#) this is a common thing that gets configured during the initial setup, but for PC users it mainly comes into play if you need to run a large [mass import](#) of data from a spreadsheet.

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 **Tip:** This process helps with speed and stability of running large mass imports because you won't need to rely on a steady internet connection, once the file is prepped and placed on the remote server, you could start the import and not worry about the internet going out in your local environment.

Outline

- #1 Setup and Log into your Trail Blazer Remote Desktop (on PC)
- #2 Map your Disk Drives on RDP to Allow for Importing of Files (Spreadsheets, Images, Attachments, Etc.)
- #3 Enable your Clipboard to Copy-and-Paste 'Text' into the Remote Desktop Connection
- #4 Related Resources

#1 – Setup and Log into your Trail Blazer Remote Desktop (on PC)

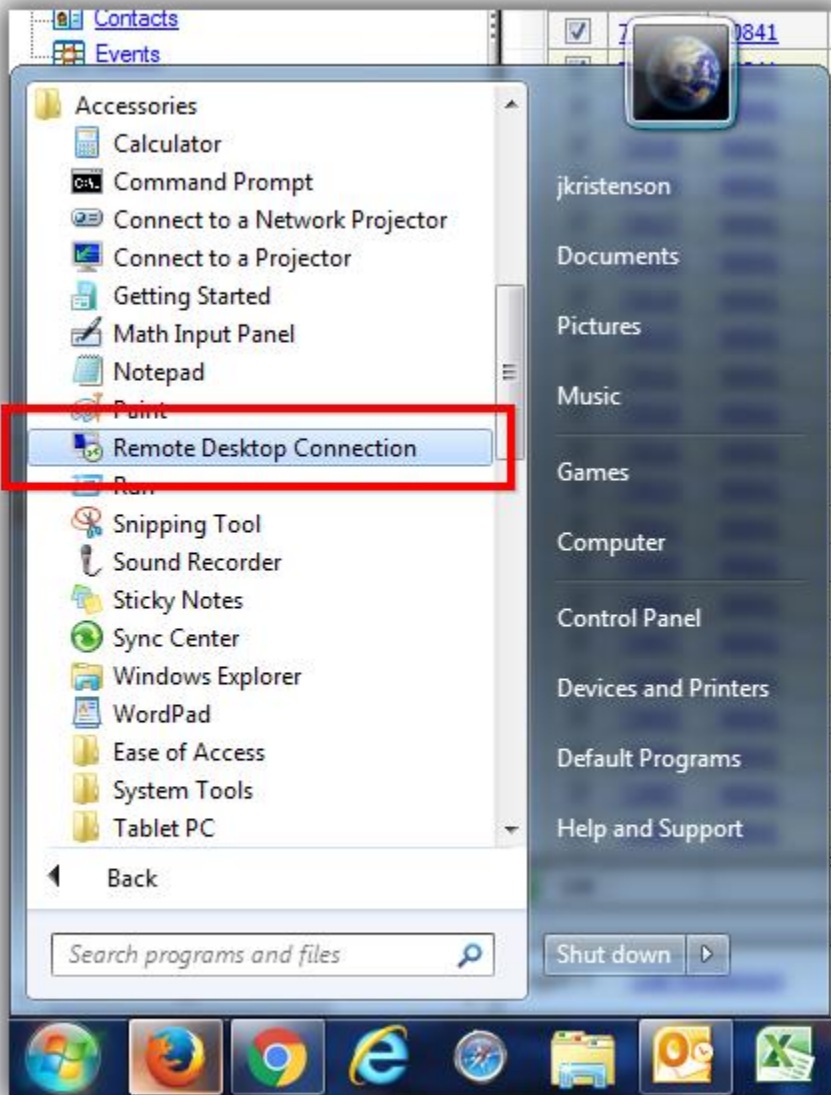
IMPORTANT: If this is your first time logging into your remote desktop you'll need to request the **credentials** from our **Support Team** by either calling (1-866-909-8700) or email (support@trailblz.com) – these credentials will be shared by *all* users logging in this way, once logged in you'll use

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your own *unique* credentials to log into the database itself. *If you don't have your own [user account](#) setup yet you'll need one of your database admins to create an account for you, and provide you the credentials/DB Name.*

Launch the **Microsoft Remote Desktop** application by clicking on the **Start Button > All Programs > Accessories > Remote Desktop Connection**

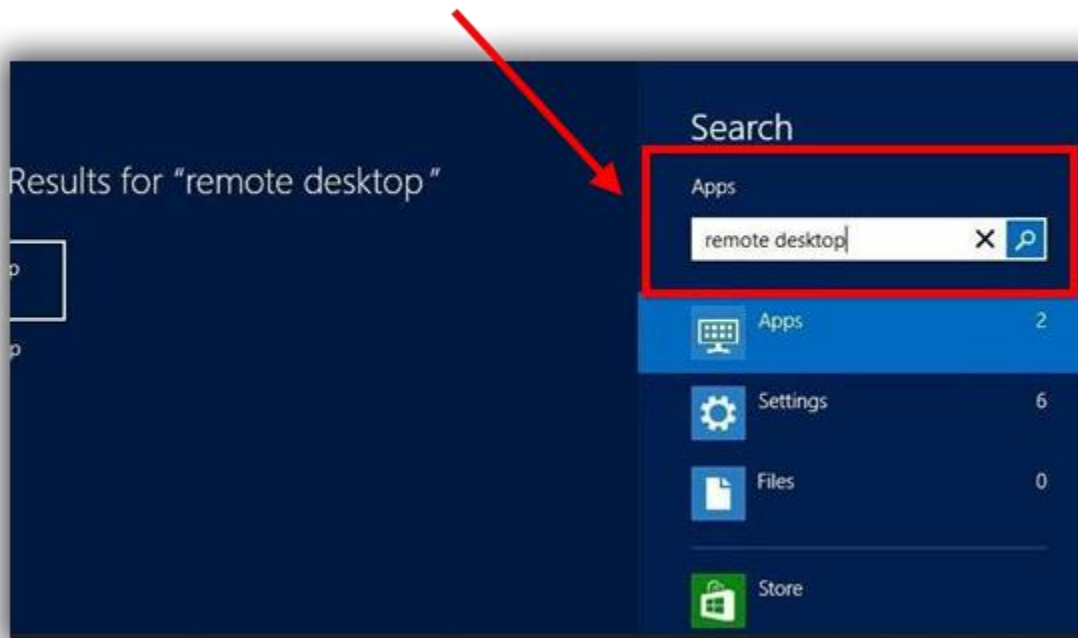
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If you're on **Windows 8 or above** you can launch the app by searching for the keyword 'Remote Desktop' in the Windows search box (*image below*).

If on Windows 8 or above search 'Remote Desktop'.



Under the **General** tab enter the **Computer (server) Name**, **Username (same as your Database Name)**, and click [**Connect**].

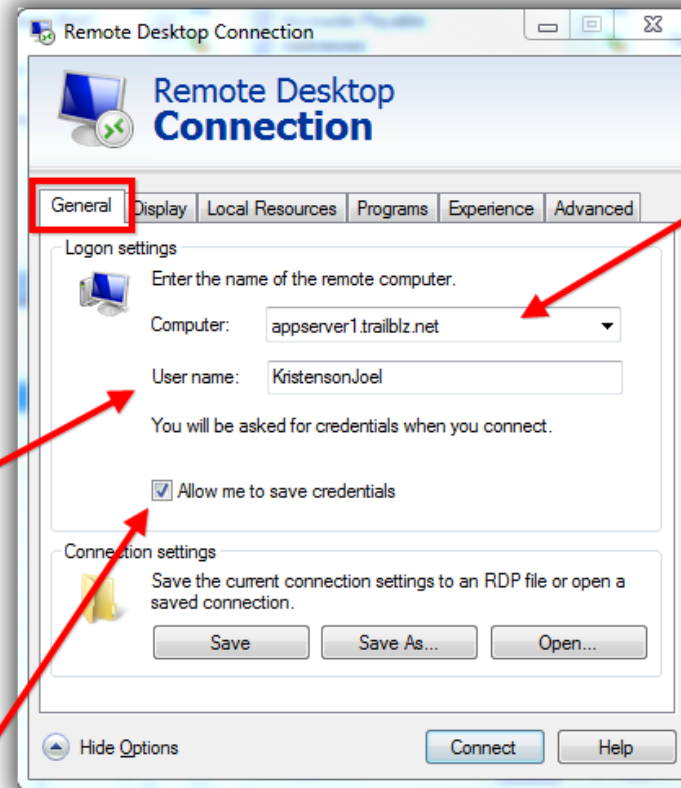
- The **Computer/Server Name** will always be **appserver1.trailblz.net**

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- The **UN** is the *same* as your Database Name (*contact us or one of you Database Admins if you don't know it*)
- The **PW** will be shared by everyone at your organization connecting this way (*contact us if you don't have it*)

My *example* configuration is below:

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives



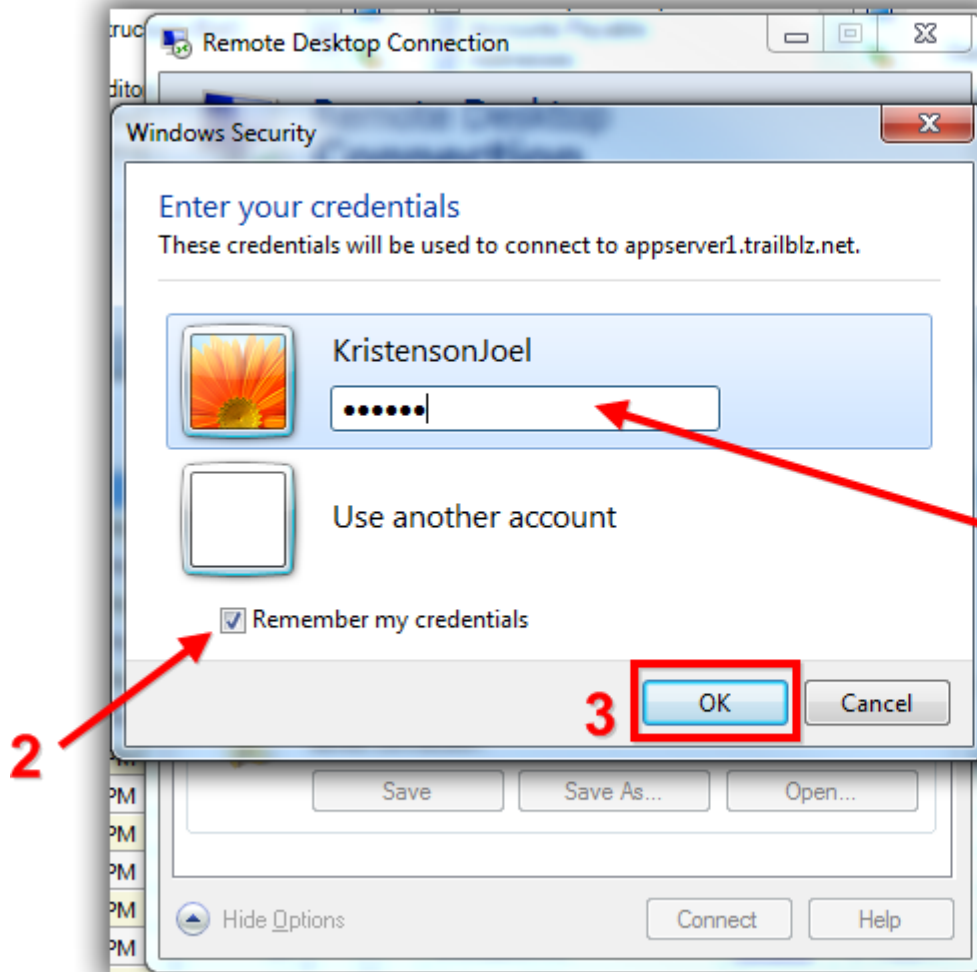
Enter the Computer 'Server' Name which will always be: appserver1.trailblz.net

Enter the UN for your remote desktop (same as your Database Name).

Check this box if you want your computer to remember your RDP credentials.

Enter your **Password**, check the box the **'Remember my credentials'**, and click **[OK]**.

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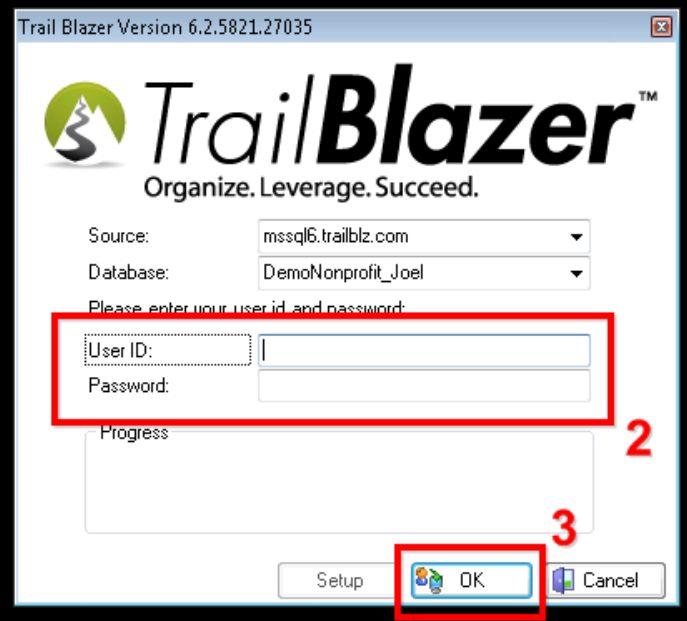
1. Enter the PW, contact us if you don't know it.

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Once logged in you can launch the **Trail Blazer** application and log in with your *unique* UN & PW.

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Once you're logged into the remote desktop server, click on the Trail Blazer icon, enter your unique credentials, and click [OK] to log into your database.

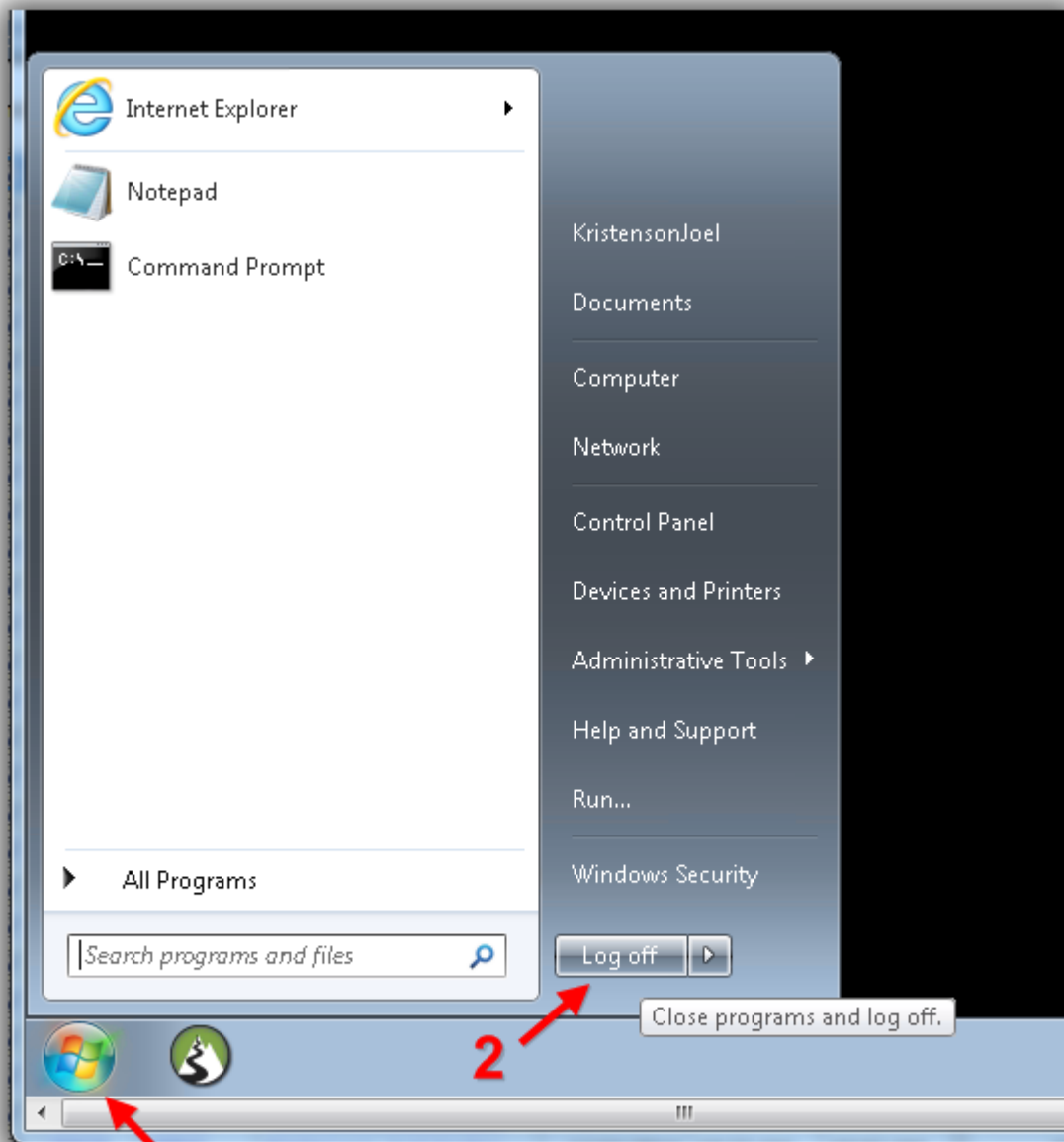


The screenshot shows a Windows-style dialog box titled "Trail Blazer Version 6.2.5821.27035". It features the TrailBlazer logo and tagline "Organize. Leverage. Succeed." at the top. Below the logo are two dropdown menus: "Source:" with the value "mssql6.trailblz.com" and "Database:" with the value "DemoNonprofit_Joel". A prompt "Please enter your user id and password:" is followed by two input fields: "User ID:" and "Password:". A red box highlights these two input fields, with a red number "2" to its right. Below the input fields is a "Progress" bar. At the bottom of the dialog are three buttons: "Setup", "OK", and "Cancel". The "OK" button is highlighted with a red box, and a red number "3" is placed to its right. A red arrow labeled "1" points from the bottom left towards the dialog box.

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When you're finished working in the remote desktop or the day you should **close down** your database, and completely **log off** of the remote connection.

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How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives

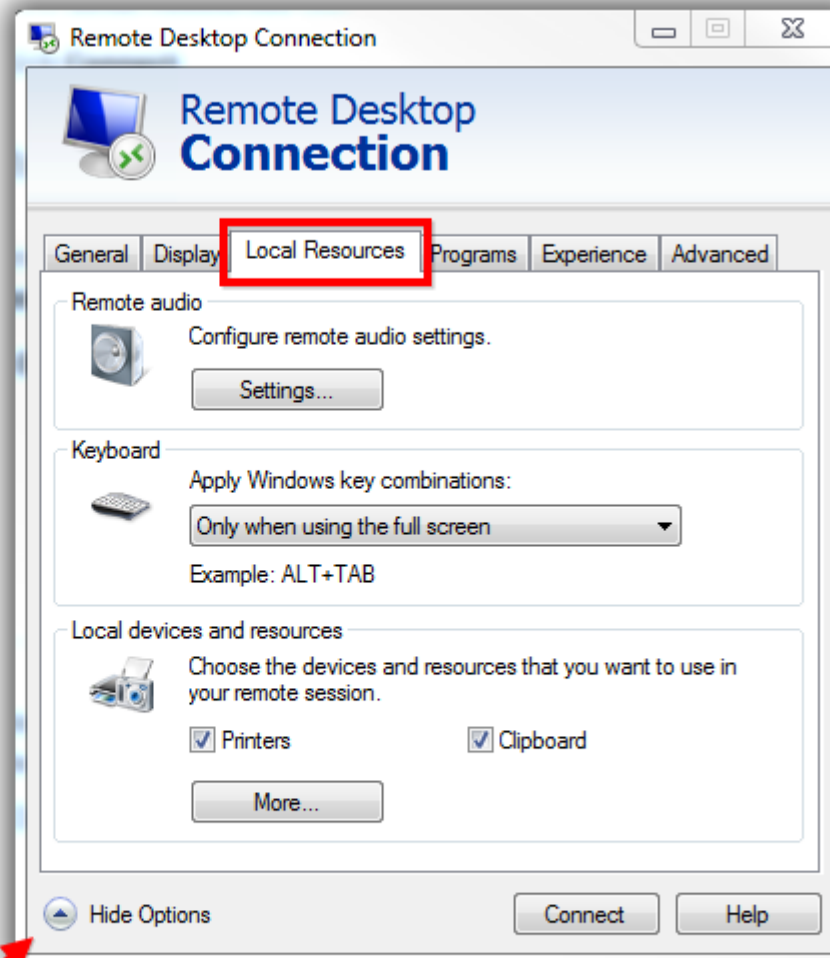
The next section will walk through the steps to map your **local PC disk drives** on the RDP configuration so that you can **import/export spreadsheets & images**.

#2 – Map your Disk Drives on RDP for Easy Importing/Exporting of Spreadsheets & for Uploading Images to your Database

IMPORTANT NOTE: This section was document using **Windows 7** – your screen may look slightly different if you're on an older version of Windows such as XP.

Launch the **Remote Desktop Connection** program, expand **Options** (*if it isn't already*), and navigate to the **Local Resources** tab.

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives

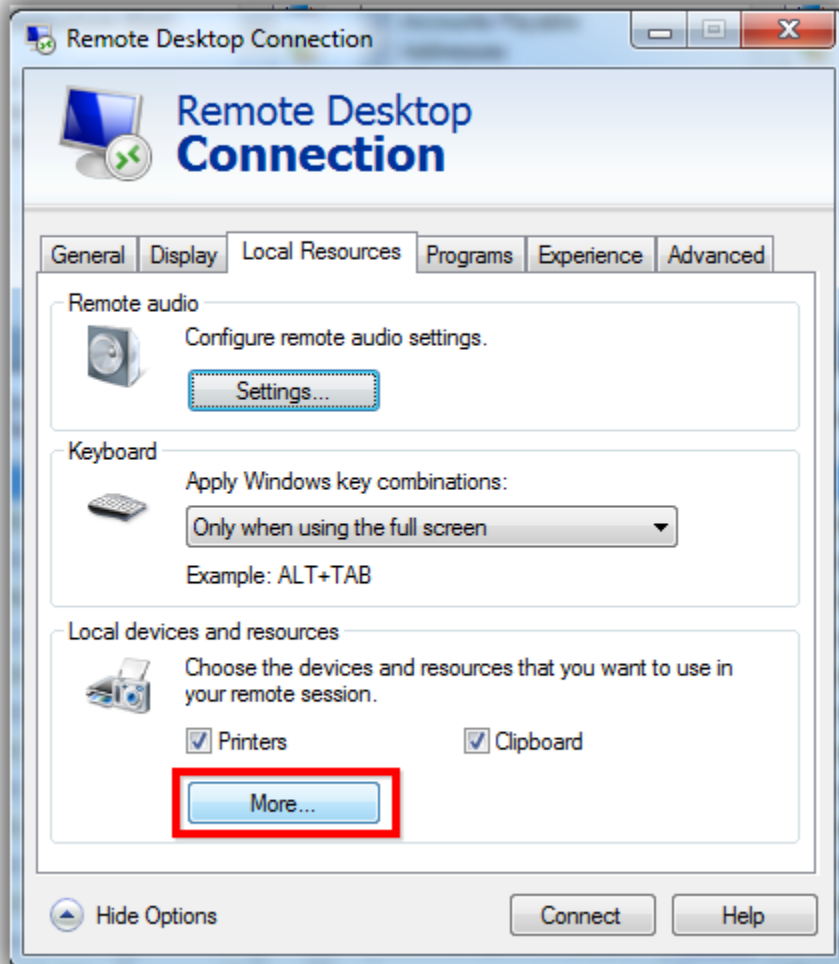


Make sure that 'Options' expanded.

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Click on the **[More...]** button.

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Expand the different *branches* to display the options within. *On my version of Windows 7 it provided 4 main categories:*

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- **Smart cards**
- **Ports**
- **Drives**
- **Other supported Plug and Play (PnP) devices**

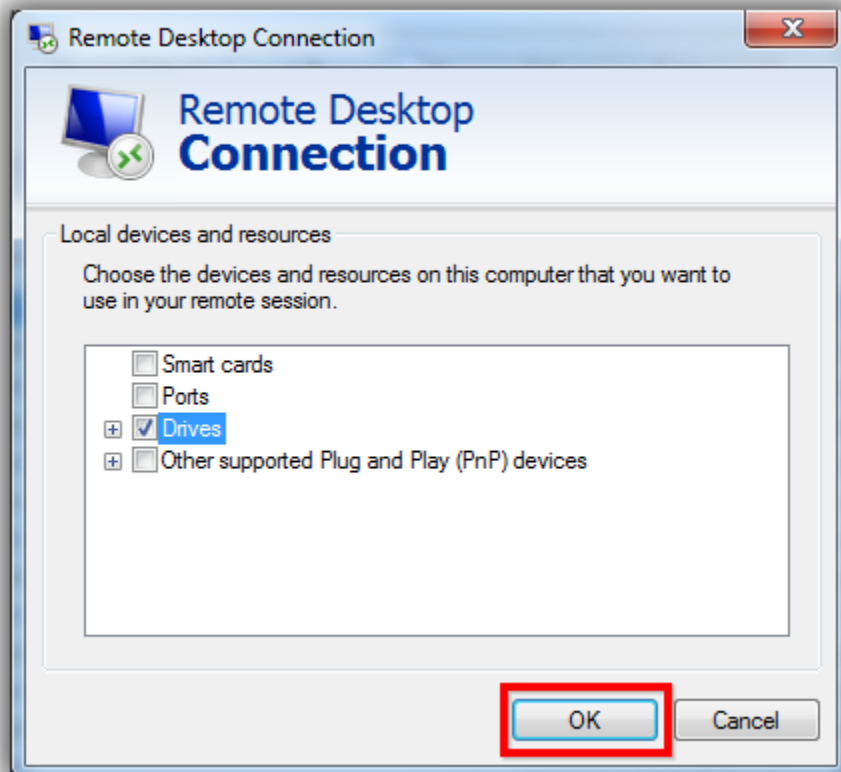
My *example* configuration options are below – I only provided access to my ‘C Drive’.

Check the boxes for which drives, ports, etc., you want to provide access to from the remote desktop connection.



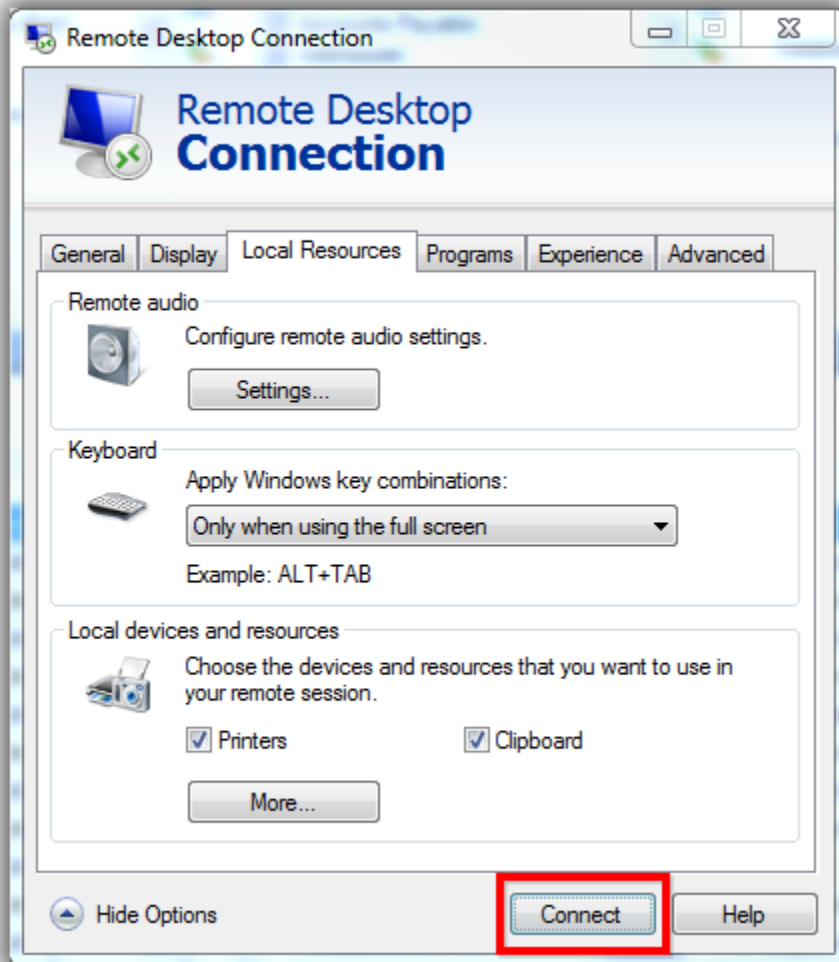
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Click **[OK]** once you're drives, etc. are mapped.



Click **[Connect]** to log into the remote server.

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives

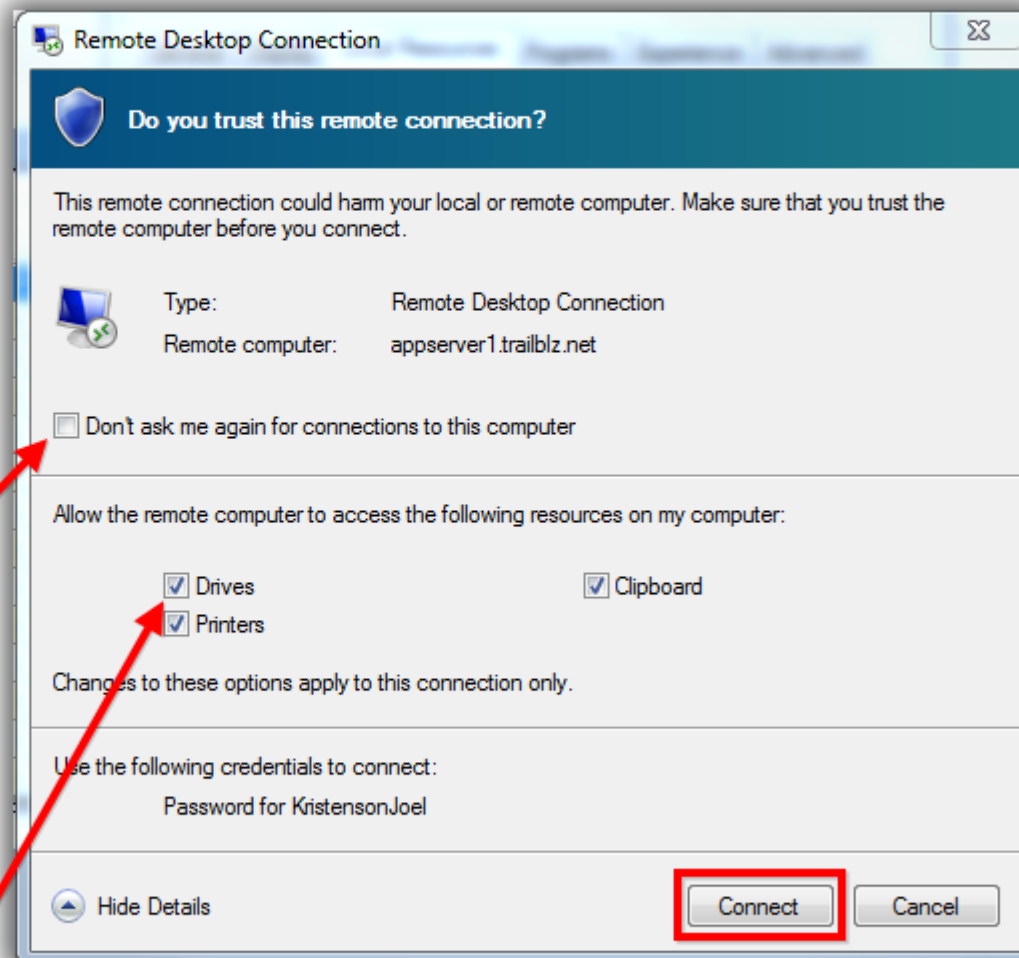


How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives

After you have configured your settings to allow access to things like your disk drives, you'll likely get a **warning message** asking if you want to proceed, click **[Connect]** to finish the log in process. *As shown in the image below, for my sample configuration, you can *optionally check a box allowing your computer to remember your settings for next time.*

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After you map your disk drives, you'll get a warning message when connecting to the remote server, click [Connect] to proceed.



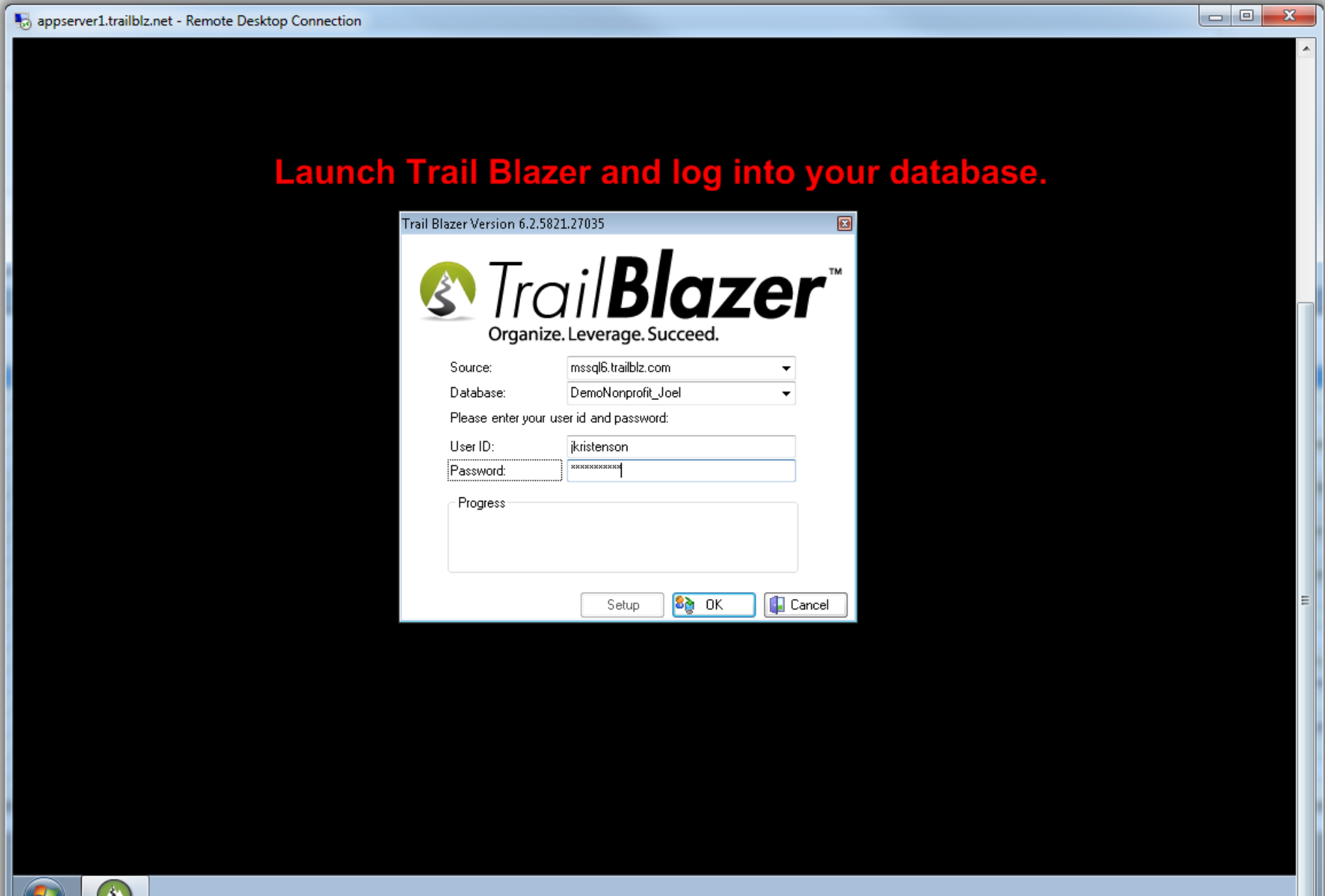
***Optionally you can check this box if you want to bypass this warning the next time you log in.**

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Once you're logged into the remote server, log into your **Trail Blazer** database.

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Launch Trail Blazer and log into your database.



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Once you're in your database, you can run a query, click **[Export]**, and your newly mapped disk drives will be available. *In my example I queried for 'all contributions' in my nonprofit database, and was able to export to the 'Temp' folder on my local machine.*

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives

1 Export

2 New directory to export to.

3 File name: 2015-12-21-all-contributions-for-all-time-demo-nonprofit-joel-db

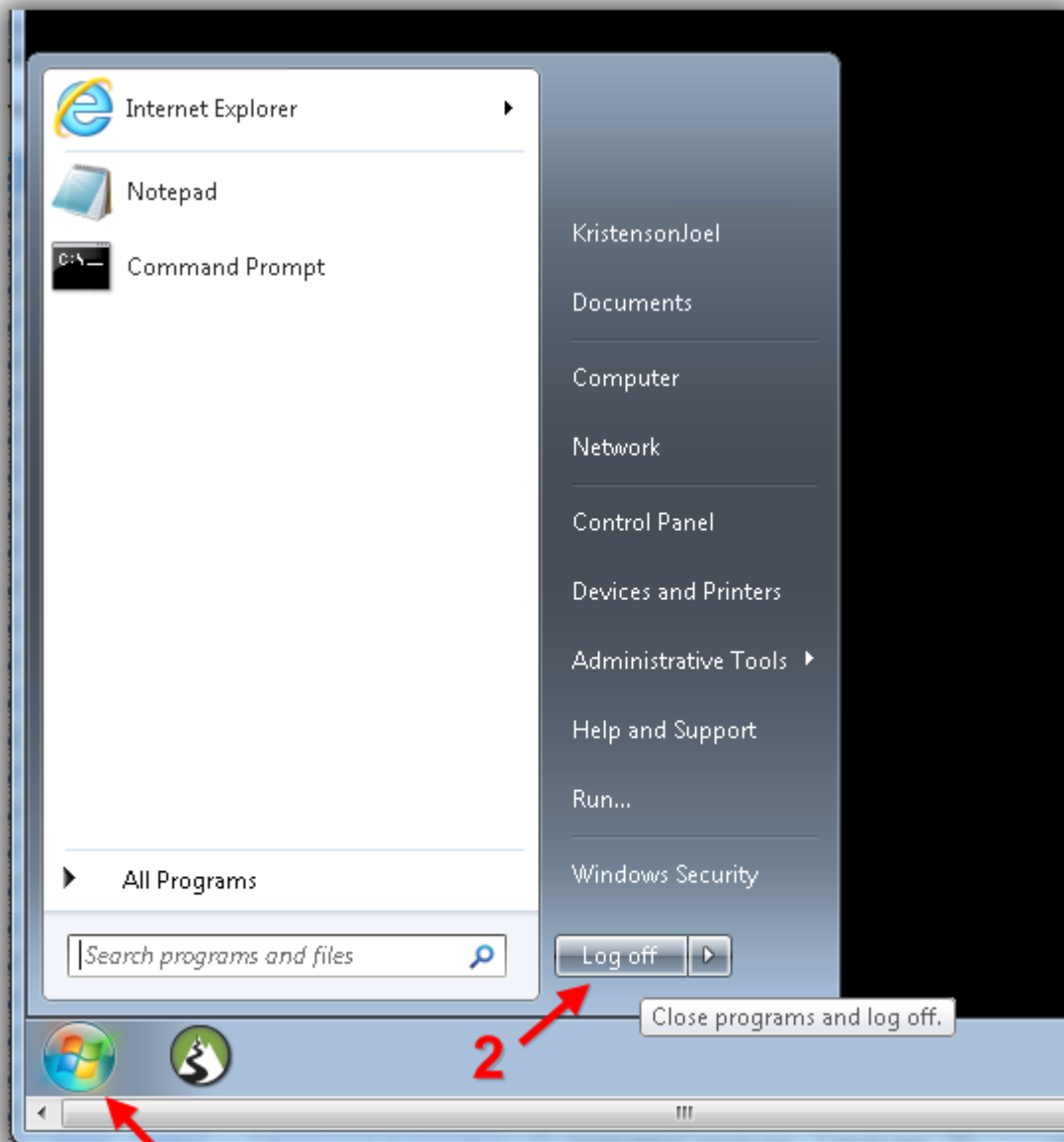
4 Save

Incl	ID	Date	Last Name	First Name	M	Amount													
<input checked="" type="checkbox"/>	464...	11/23/2015	Daisie	Jazz		1													
<input checked="" type="checkbox"/>	464...	11/23/2015	Aakhus	Steven	E.														
<input checked="" type="checkbox"/>	464...	11/23/2015	Wagner	Anthony															
<input checked="" type="checkbox"/>	464...	11/20/2015	Carvl	Alysia															
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<input checked="" type="checkbox"/>	464...	11/20/2015	Unknown	Abigail		1													
<input checked="" type="checkbox"/>	464...	11/19/2015	Jones	Hillary															
<input checked="" type="checkbox"/>	464...	11/18/2015	Wheeloek	Alex		1.0													
<input checked="" type="checkbox"/>	5602	11/12/2015	Kristenson	Joel		5													
<input checked="" type="checkbox"/>	464...	11/12/2015	Ferguson	Ashley		1													
<input checked="" type="checkbox"/>	464...	11/12/2015	Caplan	Neil		1													
<input checked="" type="checkbox"/>	464...	11/12/2015	Nelson	Amber		1													
<input checked="" type="checkbox"/>	464...	11/11/2015	Jones	Bob															
<input checked="" type="checkbox"/>	464...	11/11/2015	Crum	Caitlyn		145.00	.00	.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				425 Sugar Maple Ln		Marion	OH	43302	
<input checked="" type="checkbox"/>	464...	11/10/2015	Bauer	Danielle		500.00	.00	.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				N/A					
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<input checked="" type="checkbox"/>	464...	11/5/2015	Jentaen	Julie		100.00	.00	.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				158 Sleep Bowl Rd		Chandler	AZ	85286	
<input checked="" type="checkbox"/>	464...	11/4/2015	Piatt	Kevin		1,000.00	.00	.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				1256 Landmark Trl S		Hopkins	MN	55343	
<input checked="" type="checkbox"/>	464...	11/4/2015	Gray	Damian		145.00	.00	.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				5330 Technology Ln		Birmingham	AL	35210	
<input checked="" type="checkbox"/>	464...	11/4/2015	Broughton	Catherine		145.00	.00	.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				2510 Mills Branch Dr		Humble	TX	77345	
<input checked="" type="checkbox"/>	464...	11/4/2015	Miller	Derek		145.00	.00	.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				3050 K St NW		Suite ...	Washington	DC	20007

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As mentioned in section #1, when you are finished working for the day make sure you completely **close down** your database, and **log off** of the remote desktop connection.

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How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives

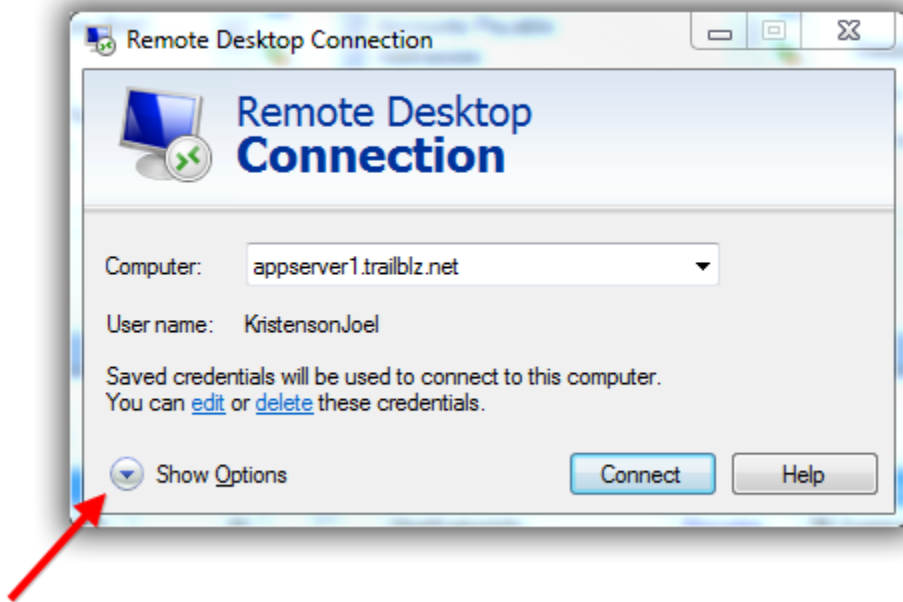
The next section shows how to quickly configure the RDP program to allow for copying-and-pasting of text using the Clipboard.

#3 – Copy-and-Paste a .csv File to the Remote Desktop for Importing

IMPORTANT: As of the time this article was put together, **Trail Blazer's** Remote Desktop App Server is locked down to **prevent copying-and-pasting of files** (*such as spreadsheets*) from your local machine to the remote connection. It can still be useful to enable your **Clipboard** for copying-and-pasting text while performing tasks like data entry, and when creating email/letter templates.

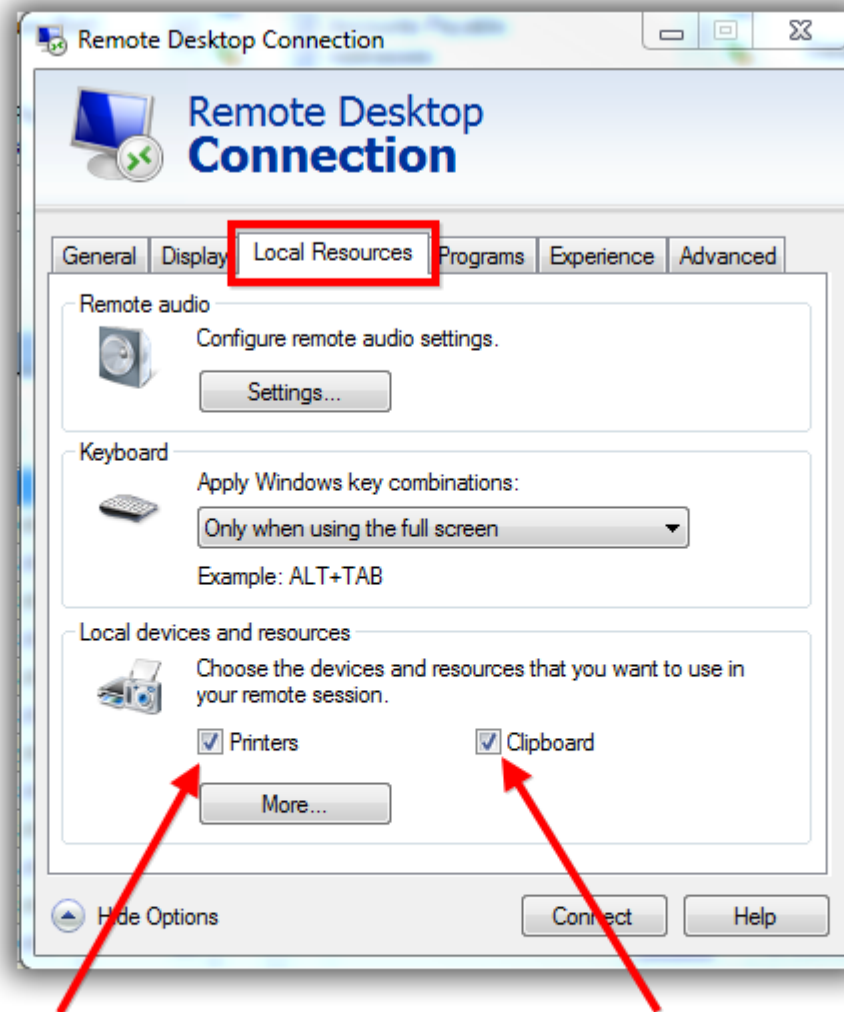
Launch the **Remote Desktop Connection** program, and click on the **Show Options** drop-down (*if it isn't already expanded*).

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives



Navigate to **Local Resources**, and check the box near the bottom-right for '**Clipboard**'. You can also check the box for '**Printers**' if you would like to be able to **print** from the remote desktop to your local printers.

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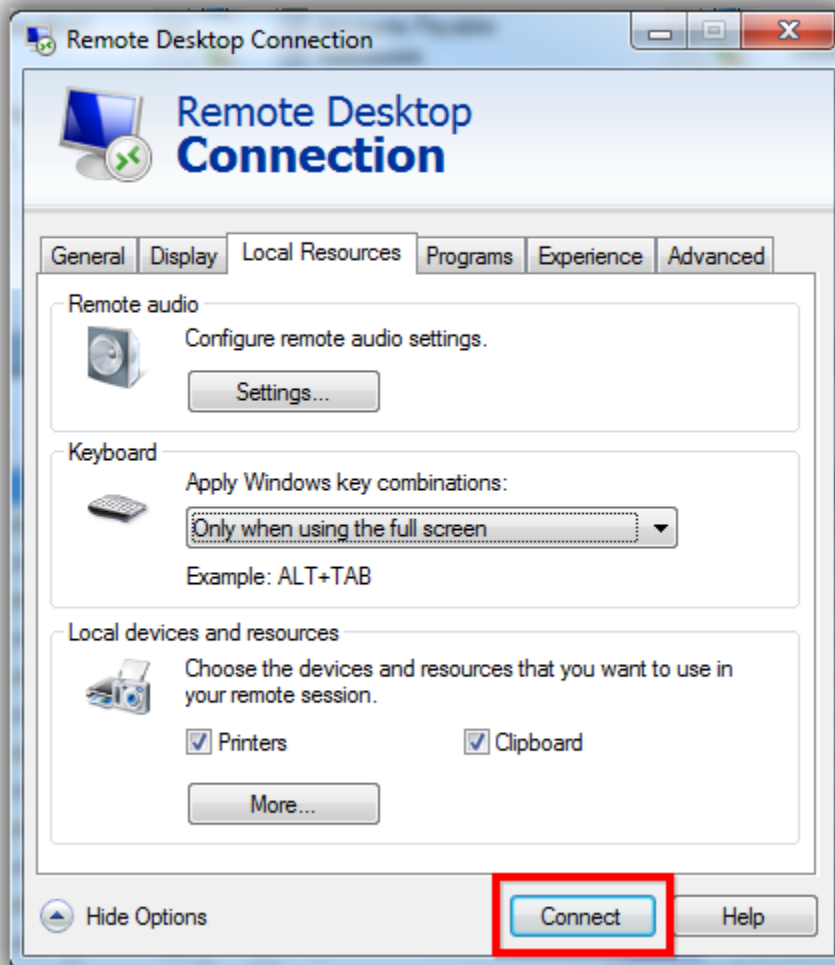
Check the 'Printers' box in order to print to your local printers.

Check the 'Clipboard' box in order to copy-and-paste files.

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives

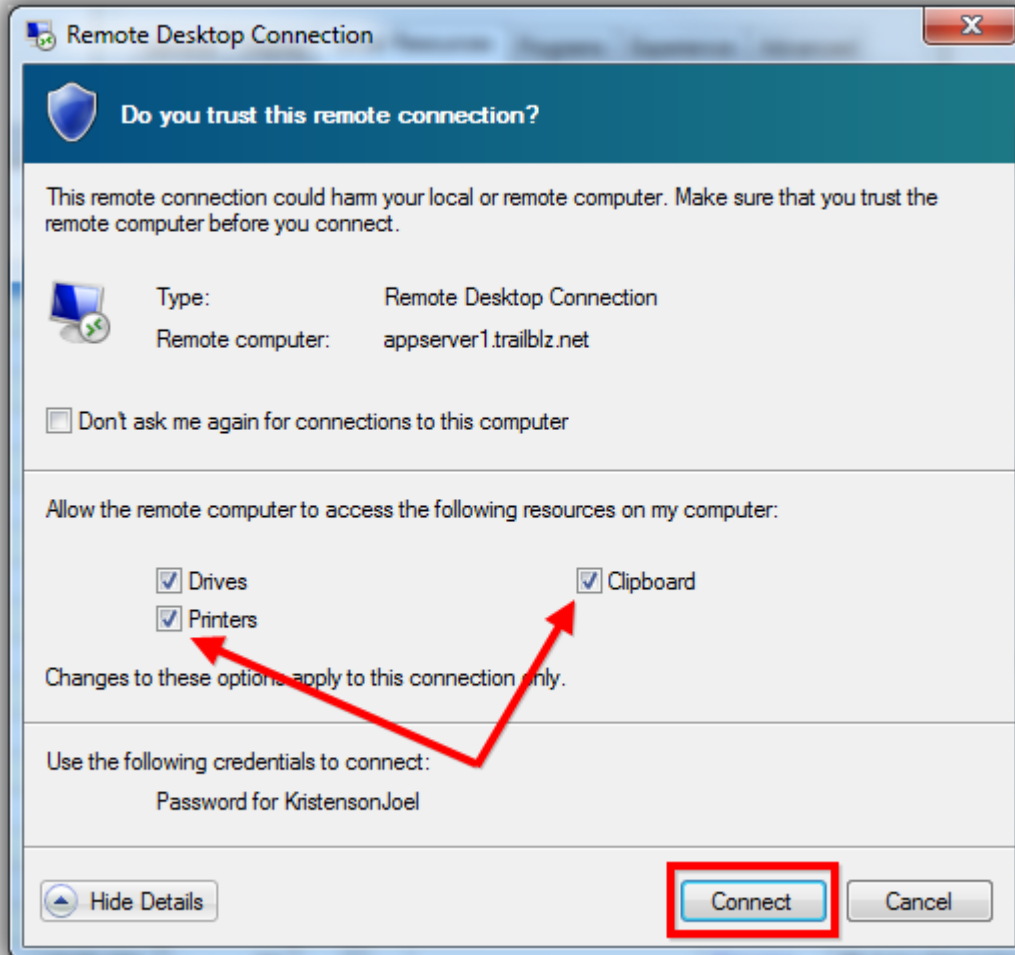
Click **[Connect]** to log into the remote app server.

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You'll likely be warned again with a security prompt, click **[Connect]** again to finish the log in process.

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives

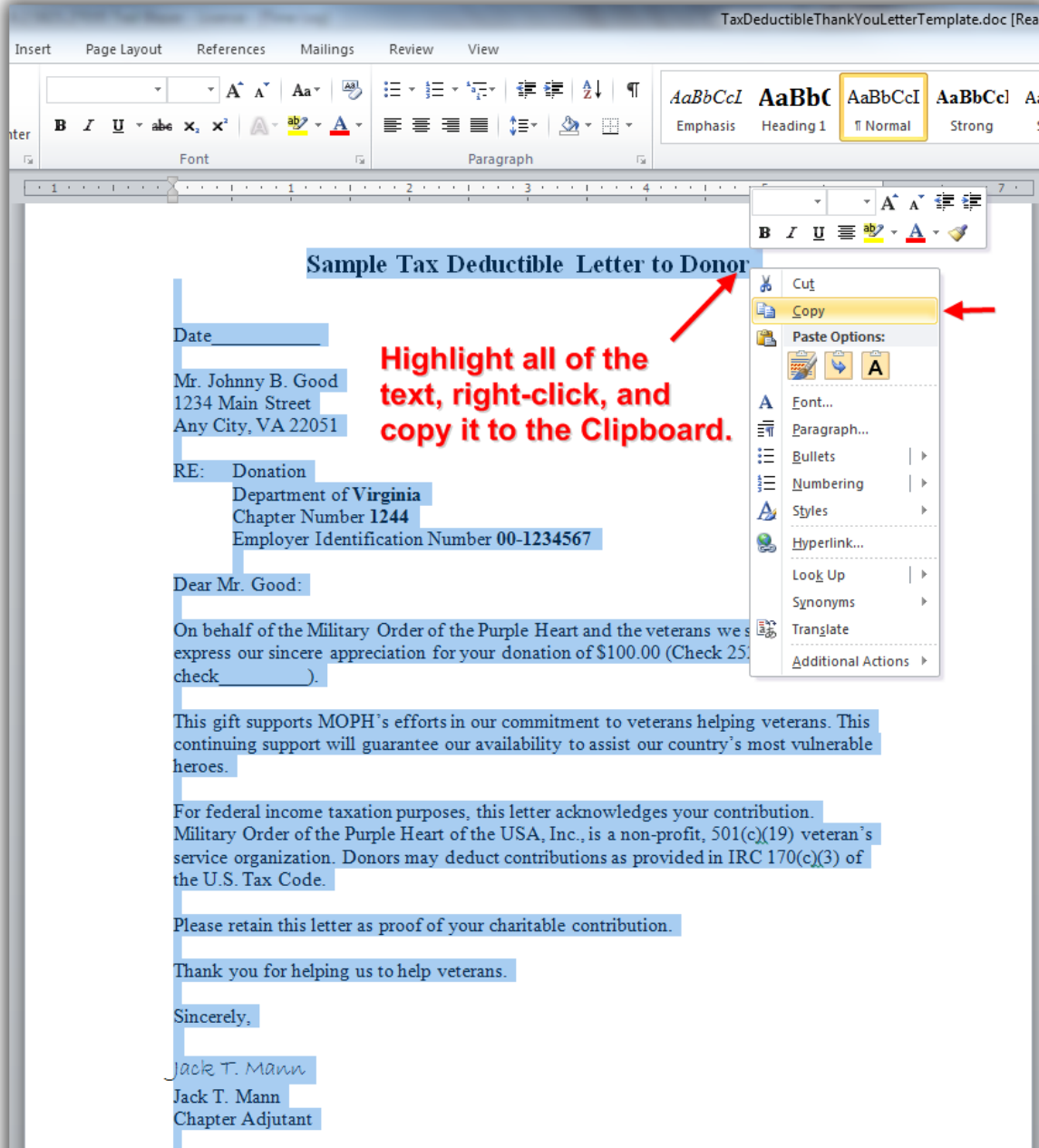


How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives

Once you're logged into the Remote Desktop Server, return to your **local machine**, and **copy** the text you need into your Clipboard (*such as an html code for an email template, or text for the body of a letter/email template*). In my example I copied text for a [mail-merge letter template](#) as shown in the images below.

Img 1 – Copy the text from your local machine into your **Clipboard**

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives



Sample Tax Deductible Letter to Donor

Date

Mr. Johnny B. Good
1234 Main Street
Any City, VA 22051

RE: Donation
Department of Virginia
Chapter Number 1244
Employer Identification Number 00-1234567

Dear Mr. Good:

On behalf of the Military Order of the Purple Heart and the veterans we express our sincere appreciation for your donation of \$100.00 (Check 25 check).

This gift supports MOPH's efforts in our commitment to veterans helping veterans. This continuing support will guarantee our availability to assist our country's most vulnerable heroes.

For federal income taxation purposes, this letter acknowledges your contribution. Military Order of the Purple Heart of the USA, Inc., is a non-profit, 501(c)(19) veteran's service organization. Donors may deduct contributions as provided in IRC 170(c)(3) of the U.S. Tax Code.

Please retain this letter as proof of your charitable contribution.

Thank you for helping us to help veterans.

Sincerely,

Jack T. Mann
Jack T. Mann
Chapter Adjutant

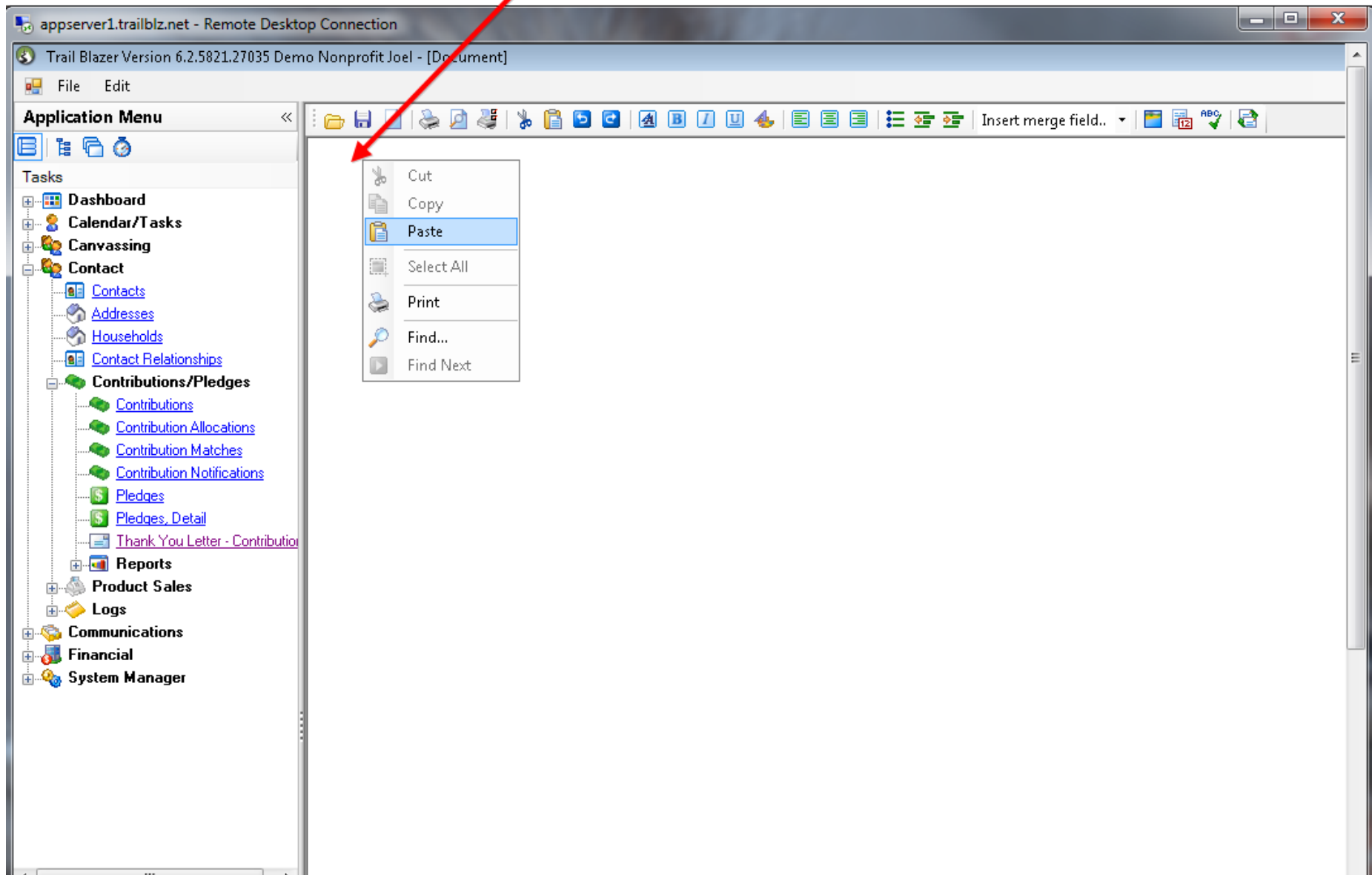
Highlight all of the text, right-click, and copy it to the Clipboard.

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Img 2 – **Paste** the text into the Remote Desktop Connection (*I pasted it as a letter template*)

How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives

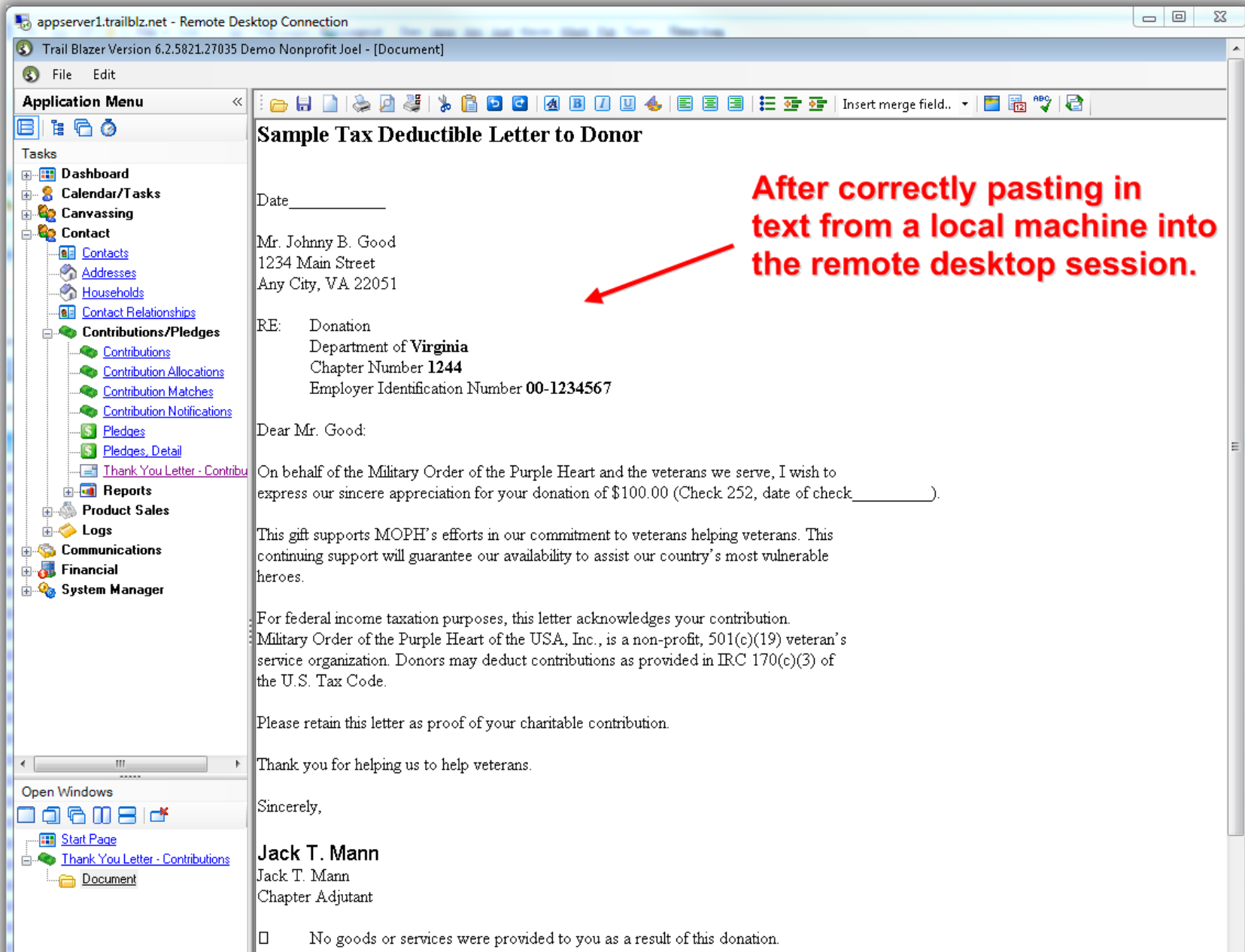
Right-click and 'Paste' in the text from the Clipboard that was copied from the local PC.



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Img 3 – My *Example* of how it looks after the text has been inserted from the **local machine** into the **Remote Desktop Connection**

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The screenshot shows a remote desktop connection to a web application. The application has a sidebar menu with categories like Tasks, Reports, Product Sales, and System Manager. The main content area displays a "Sample Tax Deductible Letter to Donor" form. A red arrow points to the "Date" field, with a red text box next to it stating: "After correctly pasting in text from a local machine into the remote desktop session." The letter content includes recipient information, a subject line, a salutation, a paragraph of appreciation, a paragraph about the organization's mission, a paragraph about tax deductibility, a closing statement, a signature block for Jack T. Mann, and a checkbox for goods or services.

appserver1.trailblz.net - Remote Desktop Connection

Trail Blazer Version 6.2.5821.27035 Demo Nonprofit Joel - [Document]

File Edit

Application Menu

Tasks

- Dashboard
- Calendar/Tasks
- Canvassing
- Contact
 - Contacts
 - Addresses
 - Households
 - Contact Relationships
- Contributions/Pledges
 - Contributions
 - Contribution Allocations
 - Contribution Matches
 - Contribution Notifications
 - Pledges
 - Pledges_Detail
 - Thank You Letter - Contribu
- Reports
- Product Sales
- Logs
- Communications
- Financial
- System Manager

Sample Tax Deductible Letter to Donor

Date _____

Mr. Johnny B. Good
1234 Main Street
Any City, VA 22051

RE: Donation
Department of **Virginia**
Chapter Number **1244**
Employer Identification Number **00-1234567**

Dear Mr. Good:

On behalf of the Military Order of the Purple Heart and the veterans we serve, I wish to express our sincere appreciation for your donation of \$100.00 (Check 252, date of check _____).

This gift supports MOPH's efforts in our commitment to veterans helping veterans. This continuing support will guarantee our availability to assist our country's most vulnerable heroes.

For federal income taxation purposes, this letter acknowledges your contribution. Military Order of the Purple Heart of the USA, Inc., is a non-profit, 501(c)(19) veteran's service organization. Donors may deduct contributions as provided in IRC 170(c)(3) of the U.S. Tax Code.

Please retain this letter as proof of your charitable contribution.

Thank you for helping us to help veterans.

Sincerely,

Jack T. Mann
Jack T. Mann
Chapter Adjutant

No goods or services were provided to you as a result of this donation.

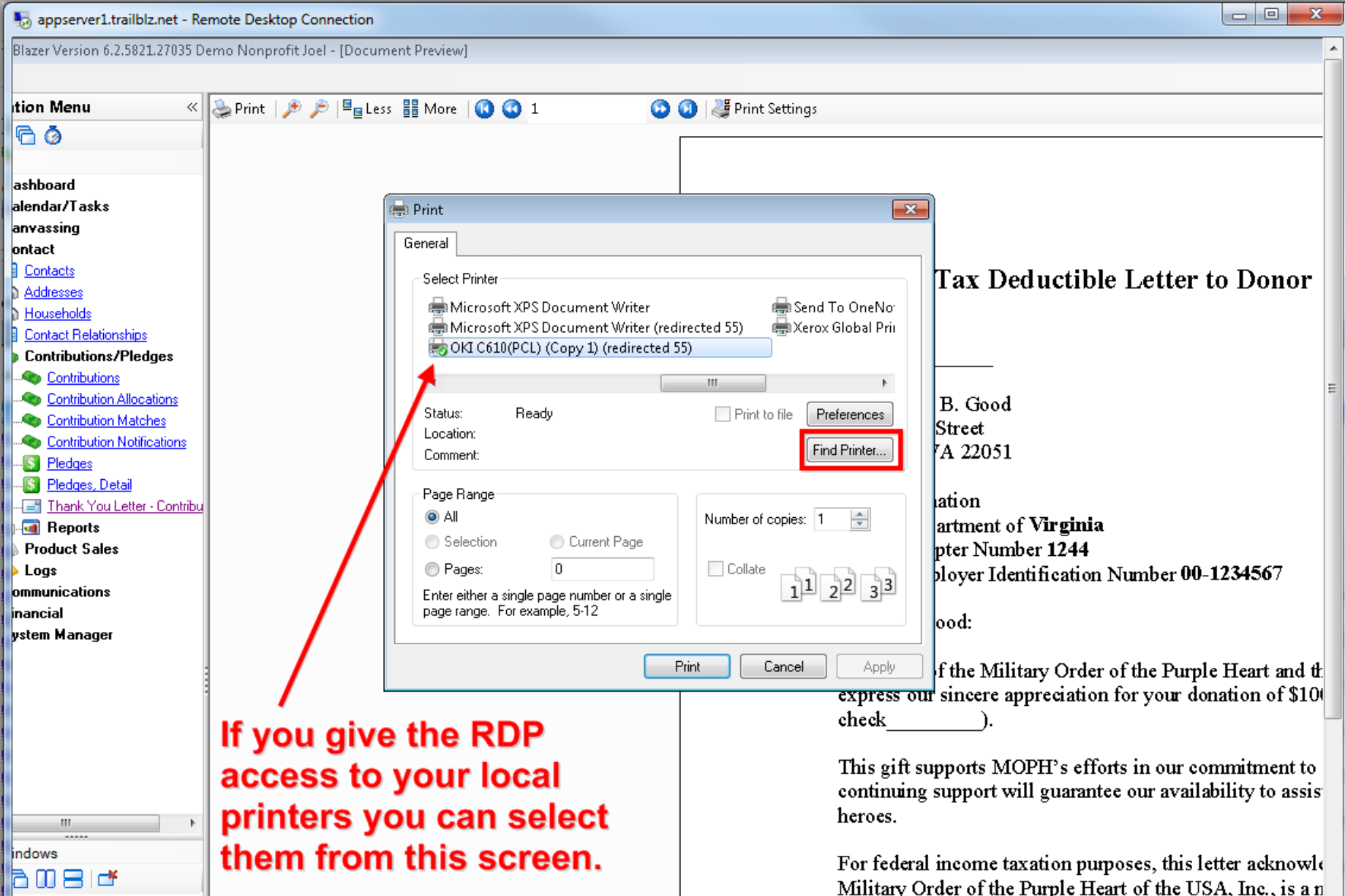
Open Windows

- Start Page
- Thank You Letter - Contributions
- Document

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If you want to print to your local print (*and you checked that box when configuring your RDP*) you can queue up your print preview, and print to one of the local printers. *My example is below.*

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Print

General

Select Printer

- Microsoft XPS Document Writer
- Microsoft XPS Document Writer (redirected 55)
- OKI C610(PCL) (Copy 1) (redirected 55)**
- Send To OneNo
- Xerox Global Pri

Status: Ready Print to file **Find Printer...** Preferences

Location:

Comment:

Page Range

All Selection Current Page

Number of copies: 1

Pages: 0 Collate

Enter either a single page number or a single page range. For example, 5-12

1 1 2 2 3 3

Print Cancel Apply

Tax Deductible Letter to Donor

B. Good
Street
VA 22051

Department of Virginia
Number 1244
Employer Identification Number 00-1234567

ood:

of the Military Order of the Purple Heart and th
express our sincere appreciation for your donation of \$100
check _____).

This gift supports MOPH's efforts in our commitment to
continuing support will guarantee our availability to assist
heroes.

For federal income taxation purposes, this letter acknowl
Military Order of the Purple Heart of the USA, Inc., is a n
service organization. Donors may deduct contributions as

If you give the RDP access to your local printers you can select them from this screen.

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Take a look at the **Related Resources** below for quick links to articles and videos on importing, mail-merge, etc. Call our live help support if you have any questions.



Trail Blazer™

- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources

#4 Related Resources

Articles: [List of Articles on Importing to Trail Blazer](#)

Article: [Configure Microsoft Remote Desktop – For Mac Users](#)

Article: [End of Day Best Practices – Included Notes for RDP Users](#)

Article: [Configure 2X Client RDP Connection on your iPad \(or any mobile device\)](#)

Article: [Copying Files from Macintosh to Remote Desktop](#)

Article: [Trail Blazer on PC vs Trail Blazer on Any Other Device](#)

Article – 3rd Party Resource: [Copy and paste from a remote computer](#)

Article – 3rd Party Resource: [How to gain access to local files in a remote desktop session](#)

Article – 3rd Party Resource: [Copy and paste a file from a remote computer to a local computer](#)

Videos: [YouTube Video Playlist on Importing](#)

Video: [2X iPad Install and Configure](#)

Trail Blazer Live Support

📞 **Phone:** 1-866-909-8700

✉️ **Email:** support@trailblz.com

📘 **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

🐦 **Twitter:** <https://twitter.com/trailblazersoft>

** As a policy we require that you have taken our intro training class before calling or emailing our live support team.*

[Click here](#) to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.

** After registering you'll receive a confirmation email with the instructions for how to log into the [GoToMeeting](#) session where we host our live interactive trainings.*

** This service is included in your contract.*