

How to Add a member to an Activity and print an Activity list

1: Click on Activities icon (or press F5)

Alternatively: Management, then Activity (or use the F5 Hot Key)

The screenshot shows the MEMBERSHIP software interface. The main window title is "MEMBERSHIP". The menu bar includes File, View, Accounting, Management, Membership, Relationships, Company, Reports, Scheduling, Administration, and Help. The toolbar contains icons for Yahrzeits, Relationships, Management, School, Reports, Accounting, Member List, and Exit. The main navigation tabs are General Family, Family Members, Relationships, and Companies. The Family Members tab is active, and the "Activities" sub-tab is selected. The "Add Member" button is highlighted. The interface displays member details for Heather Appel, including contact information and mailing preferences.

Member #: APPEHEAT
Member Type: Donor
Join Date: 01/06/2011
Resign Date: MM/DD/YYYY
Renew Date: MM/DD/YYYY
Member Attributes: Receives Mail
Family List: Heather Appel, Lauren Appel

Member A1 and A2, def

	Title	First Name	Middle Name	Last Name	Family Name
A1	Ms.	Heather		Appel	Appel
A2	None	Lauren		Appel	

Correspondence

Family Address: 14 E. 28th St. Apt. 1229, New York, NY 10016
Address: 14 E. 28th St. Apt. 1229
City/St/Zip: New York, NY 10016
Country: United States

Address:
 Residence And Billing
 Residence Only
 Billing Only
Statement PDF format: Yes No
Use Address Dates: From: To:

Family Mailing:
[Click here to Send Family Email](#)
heather.appel@gmail.com
2nd Family Email:
Combo Mailing Label:
Heather and Lauren
Combo Letter Salutation:
Heather and Lauren Appel

Please note, there is another option to add a member to a committee directly from the general family screen. (See last page of this help file)

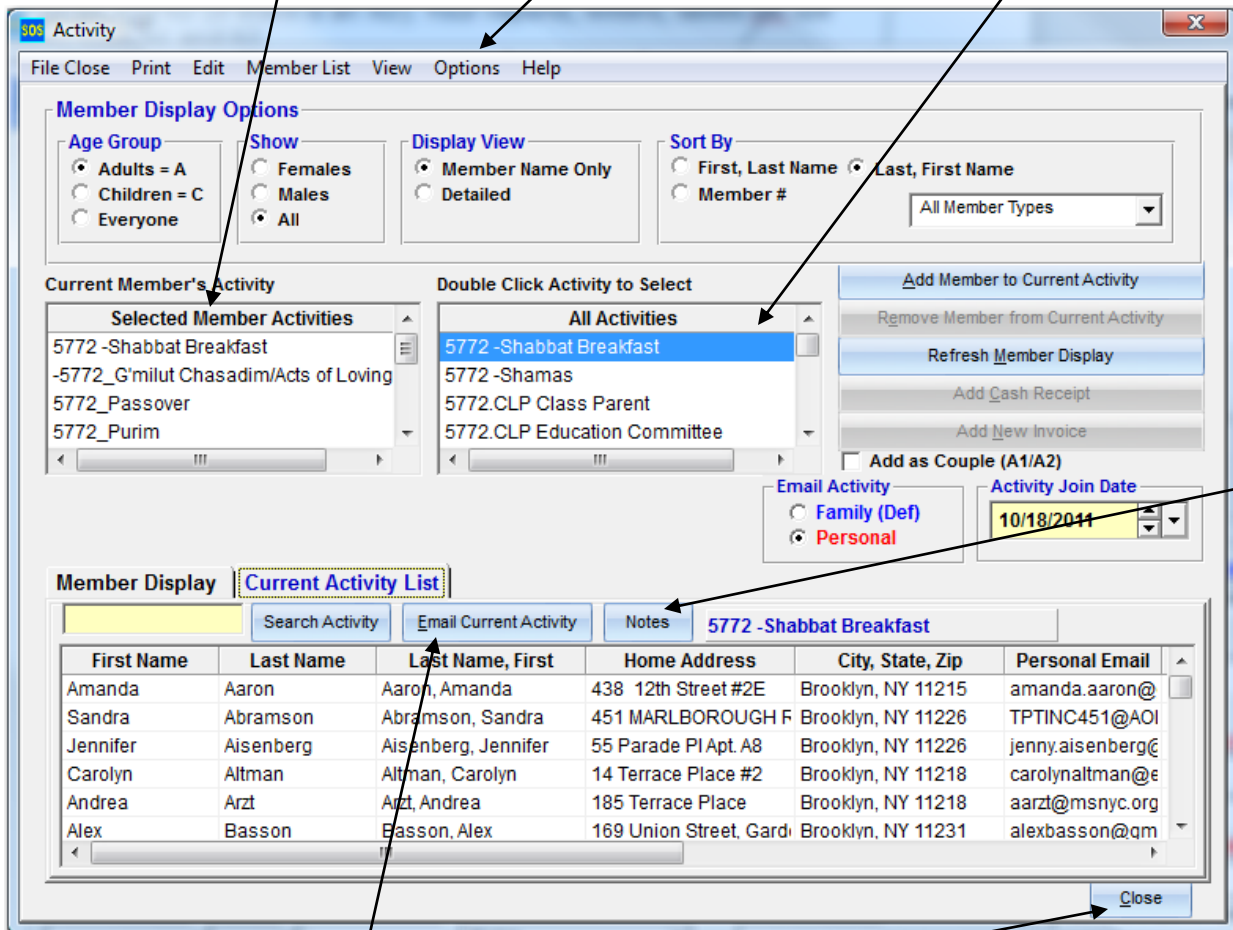
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- 2: Select a Member type or leave as is and click Refresh Member Display
- 3: Double click an Activity to make it current. Then on Member Display
- 4: Click on the Member Display Tab.
- 5: Highlight a Member by double clicking on the Name Or use search field.
- 6: Click on the Add Member to Current Activity.
- 7: On the Activity window, there is an option that allows you to add a member as A1 and A2 (if there is an A2). Your reports, letters, labels etc will now display both A1 and A2.
- 8: When you double click on a name, all the activities that the member is on, will be displayed.
- 9: Click File Print or Press F4 to print.
- 10: To export the current Activity, select Options, then Export

Lists all Activities the selected member is part of.

Use Option to directly enter a New Activity

Displays all Activities.



Track notes for the selected Activity.

Click here to send an email blast to the current Activity

Click Close Button, to exit. Allows fast re-opening of Activity window.

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From the Print menu, you have the following options:

- 1: Print a List of the members for the Current Activity
Print Labels or
Print Letters or
Email Committee Members of the Current Activity.
- 2: Print a List of All Members with All Activities or
Print Labels or
Print Letters
- 3: Print a List of Members Not Associated with the Current Activity or
Print Labels or
Print Letters

You can also Export any of the lists to be imported to Excel, Word or Access.

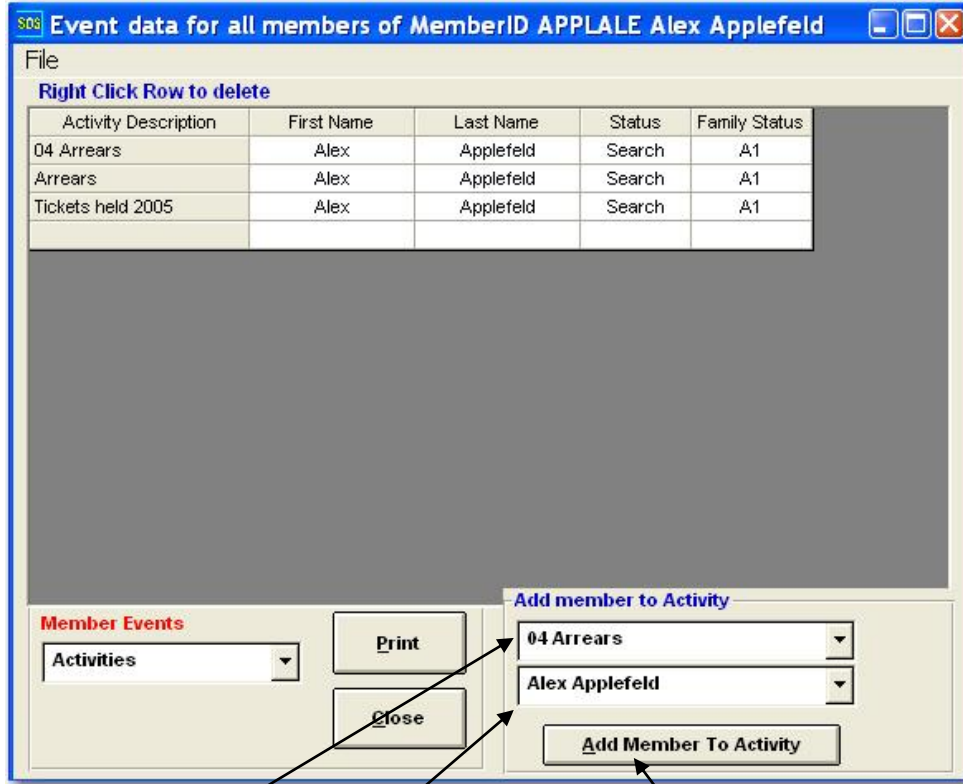
The screenshot shows the 'Print Committee' dialog box with the following sections and callouts:

- Select what to print.** Points to the 'Print What' section with radio buttons: Members Associated with Selected Committee, All Members Associated with All Committees, One Letter Per Family for Members associated with Selected Committee, and Members Not Associated with selected Committee.
- Select the fields to print.** Points to the 'Display What' section with checkboxes: Member #, Member Name, Address, Telephone, Email, Activity, and Date Join Act.
- Select sort option.** Points to the 'Sort by' section with radio buttons: Member #, Last Name, Activity, and Zip Code.
- Select how to print.** Points to the 'Print How' section with radio buttons: List Format, Labels, and Letters (selected), and a 'Margins' button.
- After you make your selection, click print preview.** Points to the 'Print Preview' button at the bottom right.

Other visible options include 'Export?' (Yes/No), 'Orientation' (Landscape, Portrait, Print Envelopes), 'Address / Letter Salutation Option' (Mr. Bob Jones, Main Screen Letter Salutation), 'Letter Date and Subject' (03/26/2009, 1 Nisan 5769, Include Hebrew Date), and 'Executive Board'.

Alternative method to add a Member to a committee:

From the General family screen, or the Family Members screen select View, then Member Events. The following screen appears:



Lists all available activities

Lists all members of the current family

After you make your selection, click here to add the member to the activity

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