

ADD A NEW MEMBER TO YOUR MANAGEMENT DATABASE

- 1: Click the **Add** button.
- 2: Enter general information about the new Member and his/her Family
- 3: The Required fields are Marked in **Red**
Member Number (No Duplicates are allowed)
Member type
Last Name
- 4: When you are satisfied with the input, click the **Accept** button

Required Fields (3):
Member No: Member Type Last Name

Click Add new. When done
click Accept
Update **In Red** (existing
member).

The screenshot shows the 'MEMBERSHIP' software interface. The 'Add Member' button is highlighted in red. The form contains the following fields and options:

- Member #:** 188345 (Required field, marked in red)
- Member Type:** Active (Required field, marked in red)
- Join Date:** 01/15/2010
- Resign Date:** MM/DD/YYYY
- Renew Date:** MM/DD/YYYY
- Title:** Mr. (Required field, marked in red)
- First Name:** Leonard
- Middle Name:** (Required field, marked in red)
- Last Name:** Ansin (Required field, marked in red)
- Family Name:** Ansin
- Family Address:** 107 Clocktower Dr #301, Waltham, MA 02254-9110
- Family Mailing:** Leonard and Jane

The defaults for the A1 and A2 salutation and the Country are set in Administration / Program Administration.

ADD A NEW MEMBER TO YOUR MANAGEMENT DATABASE

1: How do you add a new Family Member/Individual?

2: Go to the *Family Members* screen of the Main Screen.

3: Click the **Add Individual** button.

4: Enter information about the Individual.

Required Fields are in Red

5: Click the **Accept** button

Click on Add to enter New Family Member. When complete click Accept.

Required Fields are in Red:
First name, Last Name, Family Status

The screenshot shows the 'MEMBERSHIP' software interface. The 'Family Members' tab is active. The 'Add' button is highlighted in blue. The form contains the following fields and values:

Field	Value
Member #	M88345
Title	Mr.
First Name	Leonard
Middle Name	
Last Name	Ansin
Family Status	A1
Marital Status	
Maiden	
Nickname	Leonard
Hebrew Name	
DOB	MM/DD/YYYY
Age	
M/F	M
DOD	MM/DD/YYYY
Wedding Anniversary	MM/DD/YYYY
Personal Address	107 Clocktower Dr #301, Waltham, MA 02254-9...
Contact Info	lansin@ansintech.com
Correspondence	Mailing Label, Letter Salutation
Bar/Bat Mitzvah	MM/DD/YYYY
Confirmation Date	MM/DD/YYYY

Click Quick Add New (under Member Options) to simply enter the first and last name of a new member

Click on Update to Update an Existing member

The Last name is automatically filled in from the A1 Member and the family Status is automatically set to Child. You can edit these items.

ADD A NEW MEMBER TO YOUR MANAGEMENT DATABASE

To add business information, you first select the member, under the family Member List then click on the Business Information Icon. (Move your mouse over the buttons, slowly, to see a description of what each button does). The following screen appears. None of the fields are required.

BUSINESS INFORMATION

File Print

Business Info

Leonard Ansin

Company Name

Title

Occupation

Address

City/State/Zip

City State Zip

Country

Tel Ext

Email

Website

Fax/Bus.Cell

Direct/Beeper

Member Info Update

Update by Update on

Complete the information then click Update.

Technical Support:

If you have any problems or questions pertaining to the operation of SOS, please be sure to call technical support or email SOSsupport@ansintech.com

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