

## 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

The screenshot shows the 'MEMBERSHIP' software interface. The 'General Family' tab is active. The 'Member #' field contains 'BATC1771' and is highlighted in red. The 'Member Type' dropdown is set to 'Family'. The 'Title' dropdown is set to 'Mr.', 'First Name' is 'John', 'Middle Name' is empty, and 'Last Name' is 'Bryon'. The 'Family Name' is 'Bryon'. The 'Family List' shows 'John Bryon', 'Shirley Bryon', 'Benjamin Bryon', and 'Daniel Bryon'. The 'Family Address' section shows '8 Dartmouth Road, Los Angeles, CA 90059'. The 'Family Mailing' section shows 'Family Email: donbryon@comcast.net' and '2nd Family Email: shirleybryon@aol.com'. The 'Add Member' button is highlighted at the bottom right.

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

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

**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

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 form contains several sections: 'General Family' with fields for Member #, Indiv ID, Title, First Name, Middle Name, Last Name, and Marital Status; 'Family Member List' with a dropdown menu; 'Personal Address' with fields for Use Address, Select Address, Address, City/St/Zip, Country, and Main Phone; 'Contact Info' with fields for Email, Website, Personal Line, Cell, and Emergency Contact; 'Correspondence' with fields for Mailing Label, Letter Salutation, and Bar/Bat Mitzvah. Red text highlights the required fields: 'First Name', 'Last Name', and 'Family Status'. At the bottom, there are buttons for 'Add', 'Quick Add New', 'Update', and 'Cancel'. A red message at the bottom left states 'Data Entry is Required for Fields Labeled in Red'.

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

Click Quick Add New 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.

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.

The screenshot shows a window titled "BUSINESS INFORMATION" with a menu bar containing "File" and "Print". Below the menu bar is a tab labeled "Business Info". The main content area displays the name "John Bryon" in bold. Below the name is a form with the following fields:

Company Name	Polariod Corporation		
Title	Exec VP		
Occupation	Engineer		
Address	100 Main St		
City/St/ZIP	Belleville, NJ 07109		
Country	United States		
Tel	201-999-1234	Ext	
Email			
Website			
Fax/Bus.Cell			
Direct/Beeper			

At the bottom right of the form area are three buttons: "Update", "Cancel", and "Close". Below the form area, there is a red text prompt: "Click on Update to Save Changes".

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](mailto:SOSsupport@ansintech.com)

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