

To add additional Notifyees to a Deceased Person, follow these steps:

From the Yahrzeit screen, click on Notifyee (located lower section of screen). Alternatively, from the General Family screen, click on the Yahr Notify button.

File

Member Search Options
mac

Seek Member Member # Last Name

Step 1: Search for Member to find the Person or Family to be notified.
Step 2: Click on name to notify and who to Notify.
Step 3: Search for Deceased person on the right.
Step 4: Select Relationship and How to Notify.
Step 5: Click on Create Notifyee.

Search Deceased
j

Seek Deceased Last Name Show All

Found 2 Members

Macdonalds TESTCOMPANY M-Full
Tammy Machado MACHADO Prospective

2 available associations

Macdonalds A1
Steve Jobs O

Found 11 Deceased records

Jacobs, Alan DOD 07/05/1984 Notify Civil
Jacobs, Debby DOD 09/28/2002 Notify Civil
Jacobs, Seth DOD 12/25/2002 Notify Civil
Jacobs, Thelma DOD 06/04/2003 Notify Civil
Jaffe, Charles DOD 09/05/1934 Notify Civil
Jaffe, Mary DOD 09/27/1991 Notify Civil
Jaffe, Teddy DOD 08/26/2008 Notify Hebrew
Jandorf, David DOD 10/24/2005 Notify Civil
Jandorf, Robert DOD 05/21/1985 Notify Civil
Jandorf, Sadie DOD 04/01/1987 Notify Civil
Johnson, Daniel DOD 10/04/2005 Notify Hebrew

Who to Notify

Selected Person
 A1 and A2
 The Family

Relationship to

A1

Notify By

Civil Hebrew

Create Notifyee

Notes

Family Yahrzeits

| | First Name | Last Name | Relationship | Deceased First Name | Deceased Last Name | Notify By | Notes |
|---|------------|-----------|--------------|---------------------|--------------------|-----------|-------|
| * | | | | | | | |

- 1: Enter the last name of the Notifyee and click Search Member. Then click on one of the available associations.
- 2: Enter the Deceased last name (right side of screen) and click Seek Deceased.
- 3: Click on who to Notify
- 4: Relationship to
- 5: Notify by, Civil or Hebrew
- 6: Once the information is correct, click Create Notifyee.

The notifyees are shown on the bottom of the screen
They are also shown on the Relationship Tab of the SOS main window.

How to display Yahrzeit Notifyees for the current family or all Families.

- 1: Use the Member List to find the desired Notifyee
- 2: Click on the *Relationships* Tab.
- 3: Click the "Yahrzeit Notifyees " option.

Click on **Yahrzeit Notifyees**

Lists all Yahrzeits entered (only enter Yahrzeit once and notify as many Members as needed)

The screenshot shows the 'MEMBERSHIP' software interface. The 'Relationships' tab is active, and the 'Current Yahrzeit Notifyees' section is displayed. The grid contains the following data:

| Family Member | Relationship To Family Member | Yahrzeit | Notify By | DOD | Yahrzeit Date |
|-----------------|-------------------------------|------------------|-----------|------------|----------------|
| David Benharris | Father | Justin Benharris | Civil | 02/16/2004 | 24 Shevat 5769 |
| David Benharris | Uncle | Bertram Courlang | Civil | 09/02/2008 | 2 Elul 5769 |
| David Benharris | Grandmother | Fannie Courlang | Civil | 01/29/2001 | 5 Shevat 5769 |
| David Benharris | Grandfather | George Courlang | Civil | 03/24/1980 | 7 Nisan 5769 |
| David Benharris | Stepfather | Bernie Marcus | Civil | 01/12/1995 | 11 Shevat 5769 |

Current Notifyees are displayed here

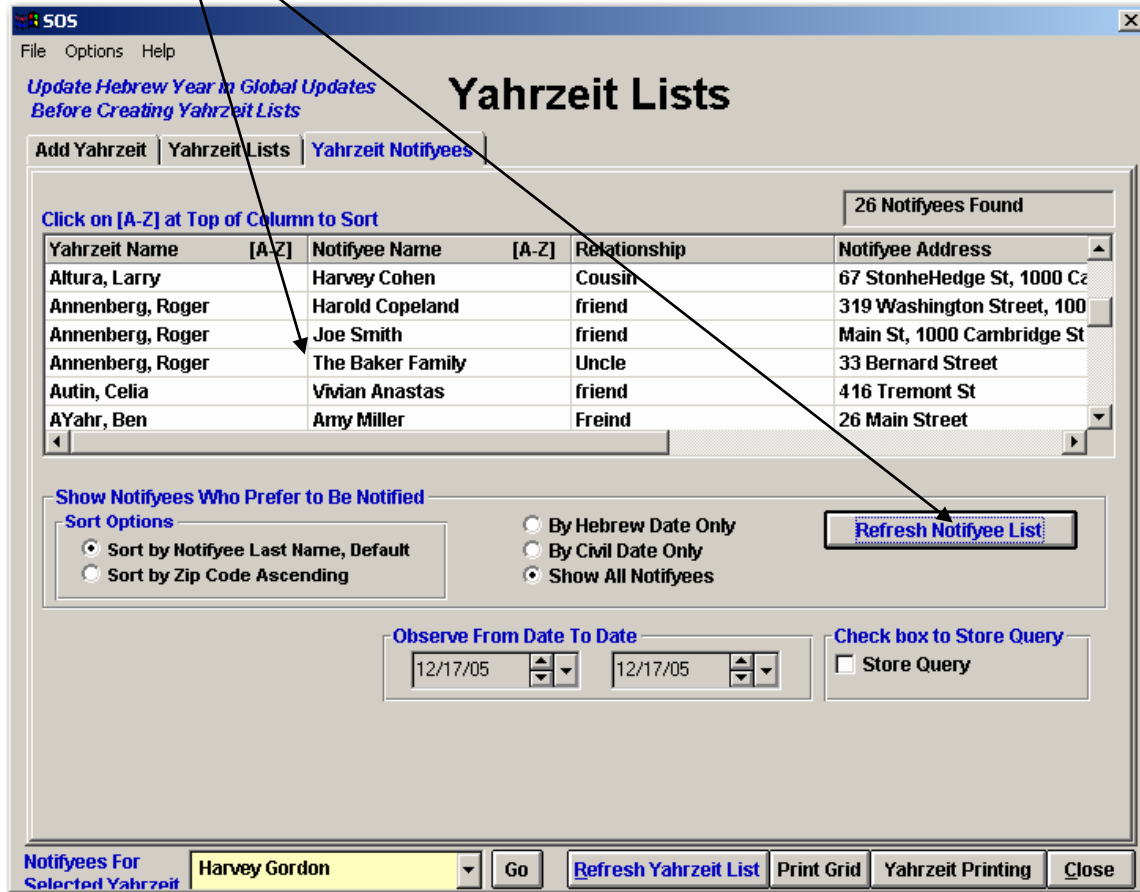
Note: You can view all Notifyees for all Members in the database, [click here](#).

Delete: To delete a Notifyee, Right click on the appropriate Notifyee in the Grid and follow the on-screen messages.

Sort: To sort the columns in the Grid, click on the **columns headings**.

The purpose is to establish the Family name as a Link to the deceased person. Next open the Yahrzeit section, and setup the Date Range for notification. Then click on the Yahrzeit Notifyee Tab and click the Refresh Button

From the example that we setup on the Relationship tab, you will see that the **The Baker Family**, will received the Yahrzeit notification



The Baker Family will be in the salutation of the letter, labels, export file and the Notifyee report for the selected Yahrzeit report.

ATG Inc. All rights reserved

Proprietary and Confidential information

This document last updated February 2009.