

How to create a list of children within a date range

January 2011

The following displays the method to find children within a date range

Step 1: From the General Family Screen, click on the Reports button then select Reports and Labels or press the F4 key.

The screenshot shows the SOS MEMBERSHIP software interface. The 'Reports' menu item in the top navigation bar is circled in black, with an orange arrow pointing to it from the text above. The interface includes a menu bar (File, View, Accounting, Management, Membership, Relationships, Company, Reports, Scheduling, Administration, Help) and a toolbar with icons for Reports, Accounting, Member List, and Exit. Below the menu bar, there are tabs for 'General Family', 'Family Members', 'Relationships', and 'Companies'. The main area contains various input fields and sections: 'Member #' (T99999), 'Member Type' (Inquiry), 'Join Date' (01/15/2010), 'Resign Date', 'Renew Date', 'Member Attributes' (Camp 2010, Donor FY 2010), 'Family List' (Leonard Ansin, Jane Ansin), 'Correspondence' section with 'Family Address' (107 Clocktower Dr. #301, Waltham, MA 02254-9110), 'Address' (107 Clocktower Dr. #301), 'City/St/Zip' (Waltham, MA 02254-9110), 'Country' (United States), 'Phone Numbers' (Tel: 617-413-9100, Mobile: 617-413-9100), and 'Family Mailing' options (Email: jansin@ansintech.com, Combo Mailing Label, Combo Letter Salutation).

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Step 2: Click on Children Only, List Format and Check off the fields in Display What
Then click on Search options

The screenshot shows the 'REPORTS AND LABELS' window with the following configuration:

- Print Options:** Search Options, Grid Format, Single Family
- Print What:**
 - Entire Membership
 - All Adults - A1, A2, Other Adults
 - "A1" and "A2" - Adult Combo
 - "A1" and "A2" - Adult Combo (includes only records which have an A2 adult)
 - "C" - Children Only
 - "A1", "A2" - Business Info Portrait List View Only
 - Company and Contact Info
- Print How:**
 - List Format
 - Labels
 - Letters
 - Grid Format
 - Send Email
 - Print Envelopes
- Detail Export:**
 - No
 - Yes
- Label Export:**
 - No
 - Yes
- Store Query
- Margins

Click on Print Preview to Complete Export

- Page Orientation:**
 - Landscape
 - Portrait
- Salutation Style:** Bob Jones
- Custom Header for Reports:**
 - Include Custom Report Header

Letter Date and Subject

03/29/2007 Include Hebrew Date

10 Nisan 5767 Enter Subject Below: _____

Document Editor **Print Preview** Close

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Step 3: Click on Birthday From and set a date range

Click on Member Type and select the member Types needed

Then click on Print options and at the bottom right of the screen, click Print Preview. Your done. Use the next etc buttons to move through the screens. Use the print range button to print 1 to x number of a pages.

The screenshot shows the 'REPORTS AND LABELS' window with the 'Print Options' tab selected. The 'Detailed List of Search Filters' section on the left includes various checkboxes, with 'Birthday From' checked and a date range of '01/01/1999' to '12/31/1999' set. On the right, the 'Member Types' section is expanded, showing a list of member types: 'Active' (checked), 'Cemetery', 'Inquiry', 'Member - Donations', and 'Member - School'. An orange arrow points from the 'Member Type' checkbox to the 'Active' checkbox in the list.

Member Type	
<input checked="" type="checkbox"/>	Active
<input type="checkbox"/>	Cemetery
<input type="checkbox"/>	Inquiry
<input type="checkbox"/>	Member - Donations
<input type="checkbox"/>	Member - School

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The query, outlined on the previous page, used the DOB (Date of Birth) field for the selected individual. This field must be populated for the member to be included in the print preview.

The screenshot shows the SOS MEMBERSHIP software interface. The window title is "SOS 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 window has tabs for General Family, Family Members, Relationships, and Companies. The Family Members tab is active, showing a list of family members: Leonard Ansin and Jane Ansin. The profile for Leonard Ansin is displayed, with the following fields: Member # (T99999), Title (Mr.), First Name (Leonard), Middle Name, Last Name (Ansin), Marital Status (Married), Nickname (Leonard), Hebrew Name, Family Status (A1), Maiden, DOB (01/01/1970), Age (41), M/F (M), DOD, and Wedding Anniversary. The DOB field is circled in black, and an orange arrow points from the text above to it. Below the profile are sections for Personal Address, Contact Info, Correspondence, Bar/Bat Mitzvah, and Confirmation Date.

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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