

This SOS Quick Tip is designed to help you understand the flexibility of the Grid format for printing reports and selecting only the fields needed.

In this example, we'll show you how to prepare a list of Active Members, in zip code 02000 to 02200 and the A1 member only sorted by Last Name. You will also want to select the fields to be displayed.

1: Click on Reports and Labels Icon (or use the F4 Hot key)



2: Select Entire Membership (in the Print What Option)

3: Select Grid format (in the Print How Option)

The screenshot shows the 'REPORTS AND LABELS' dialog box with the following settings:

- Print Options:**
 - Print What:** Entire Membership (selected)
 - Print How:** Grid Format (selected)
 - Detail Export:** No (selected)
 - Label Export:** No (selected)
 - Store Query:** (unchecked)
 - Page Orientation:** Landscape (selected)
 - Sort By:** Last Name (selected)
 - Sort Order:** Ascending (selected)
- Letter Date and Subject:**
 - Date: 06/27/2006
 - Subject: 1 Tammuz 5766

4: Click on one of the Sort by options.

For example if you want to have everyone listed by Last Name, then click on the Last Name option.

5: Click on the **Search options Tab**

6: Click on **Member Types** and select Active (This may vary depending on your situation)

7: Click **Zip Code** and enter from 02000 to 02200

8: Click on **Family Status** and select A1

The screenshot shows the 'REPORTS AND LABELS' window with the 'Search Options' tab selected. The 'Detailed List of Search Filters' section on the left contains several checkboxes and input fields. The 'Zip Code From' field is set to '02000' and 'To' is '02400'. The 'Family Status' dropdown is set to 'A1'. The 'Member Types' section on the right shows a list of member types with 'Active Member' selected. The 'Filter by State(s)/Province(s)' checkbox is unchecked.

Detailed List of Search Filters

- Member # From
- Member L Name
- Home City Like
- Zip Code From To
- Birthmonth/Day From
- Age From
- Anniv. From
- Anniv. Month / Day
- Join Date From
- Resign Date From
- Gender
- Occupation
- Public School
- Pub. School Grade
- Members with Multiple Home Addresses Using Address Dates
- Only Members Wishing to Receive Mailings
- Marital Status
- Family Status
- Renew Date From

Do a Quick Search (Uncheck for Detailed Search)

Quick Search

- Category Year
- Month of:

User Defined field Search(Grid Only)

- Defined Field Name

Check/Uncheck here to view Member Type

- Member Type Member Category

Member Types | Member Category

Member Type
<input checked="" type="checkbox"/> Active Member
<input type="checkbox"/> Catering Client
<input type="checkbox"/> Deceased
<input type="checkbox"/> DELETE
<input type="checkbox"/> HHTICKETS

Filter by State(s)/Province(s)

9: Click on Grid Format

10: Under Field name, select the following Fields

First Name, Last Name, IndividualMailLabel, Status, Addr1, City, State, Zip, Salutation, MemType, then click Run and the Excel Type grid will populate.

Select Fields

Click on Run, to display Results

Click Here to Export Results. See next page

Field Name	Member#	Firstname	Lastname	Indivmailla	Status	Addr1	City
<input type="checkbox"/> UserFieldNum2	BAKER	Irvin	Baker	Mr. Irvin	A1	33 Bernard	Allston
<input type="checkbox"/> PubSchoolGrade	BAKER	Cynthia	Baker	Cynthia	A2	33 Bernard	Allston
<input type="checkbox"/> PubSchoolName	BAKERST	Stephen	Baker		A1	45 East	Boston
<input type="checkbox"/> NOTES	BAKERST	Susan	Baker		A2	45 East	Boston
<input type="checkbox"/> UserField1Comp	BERGERC	Chaim	Berger		A1	222	Allston
<input type="checkbox"/> UserField2Comp	BERGERC	Rachel	Berger		A2	222	Allston
<input type="checkbox"/> UserFieldDateComp	BERRYR	Ronda	Berry		A1	57 East	BOSTO
<input type="checkbox"/> FamEmail	BERRYR	Steven	Berry		A2	57 East	BOSTO
<input type="checkbox"/> ResignDate	BETA	Julie	Goldberg		A1	1551 West	Baltimc
<input type="checkbox"/> MemReNewDate	BRAUN_E	Phyllis	Burdette	None	A1	68 East	Chicag
<input checked="" type="checkbox"/> Addr1	BURDETT	Phyllis	Burdette		A1	30 Main	Baltimc
<input type="checkbox"/> Addr2	BYRON	John	Byron	John Byron	A1	205	Chicag
<input type="checkbox"/> Country	BYRON	Paula	Byron	Paula	A2	205	Chicag
<input type="checkbox"/> MainPhone	CAPLHYL	Harry	Caplan	Harry	A1	59 Joes	Baltimc
<input checked="" type="checkbox"/> City	CAPLHYL	Joanna	Caplan	Joanna	A2	59 Joes	Baltimc
<input checked="" type="checkbox"/> STATE	CAPLHYL	Bryan	Lazero	Bryan	C	59 Joes	Baltimc
<input checked="" type="checkbox"/> ZIP	CARAME	Eliz	Carey	Ms. Eliz	A1	67A Shore	Portlan
<input type="checkbox"/> MarStatus	CARAME	Howard	Frank	Mr.	A2	67A Shore	Portlan
<input type="checkbox"/> Occupation	CARAME	Jesse	Carey	Jesse	C	67A Shore	Portlan
<input checked="" type="checkbox"/> SALUTATION	CHANGEN	Samuel	Changenu		A1	main	Boston
<input checked="" type="checkbox"/> MemType	CIONPHI	Philip	Cioni	Mr. Philip	A1	586 Falls	Philade

11: You can click on any of the top of the columns and the grid will be automatically resorted.

12: You now have a file, based on your query, that you can Mail Merge with Microsoft Word, Import to Excel or import to Access or most other Windows based programs.

