

How to export member list, email the text file and then open the text file in Microsoft Access

July 2004

How to export an entire Member list, email the text file, and then open the text file in Microsoft Access.

Part 1: Create the text file in SOS

- 1: From the General Family screen, select Reports and Labels.
- 2: Under Print What, be sure the first option is selected, **Entire Membership**
- 3: Under Print How, select **List format**
- 4: Click on Search Options Tab, then select the **Member Type's** needed in the report.
- 5: Click back on the Print Options Tab then click on **Export, Yes**.
- 6: The export file create screen will appear. Navigate to the folder that you want to save the results to, and then enter a file name (without any extension)
Write down the full path name and file name entered. Then click Continue.
- 7: Back at the Reports and Label window, click **Print Preview**. This will render the report to the screen and at the same time **create the text file** to be emailed.
- 8: Once the details are on the preview screen, then click close. Part 1 is complete.

Part 2: Email the file to a member's email address in the SOS database.

- 1: Use the Member list, to search for the member that you want to email the file to that was created in Part 1.
- 2: On the General Family Screen or the Family Member screen, click on the send button next to the email address
- 3: On the email window, select a from address in the drop down list (email address for staff are entered in List Admin)
- 4: Click on attach and navigate to the folder you wrote down in step 6 above. Click on the file and select open.
- 5: Then enter a message and click send at the top of the window. The file will be sent as an attachment.
- 6: Part 2 is now complete.

Part 3: Open the text file, created in Part 1 and 2, in Microsoft Access

The following example will show you how to import the file to Microsoft Access.

1: Open Microsoft Access and create a blank database. (suggestion, you may want to save the new database in the same folder you exported the Member List to.

2: Select, in Microsoft Access, File, get External Data, Import, Change the file type to Text, and point to the folder you saved the exported data to., highlight the file that was previously created by SOS and then select open.

3: At the first screen, leave the option at Delimited

4: Select Next, Select the delimiter as TAB, and select 1st row contains field names,

5: Then next and select into a New table or an existing table (it's your choice) then select Next (this screen gives you the option to format the fields. We suggest you just click next, you can always reformat the fields in the design mode of Access. Let access assign the primary key click next and wait a minute while Access imports your data.

The process to import the SOS text file to Microsoft Excel is similar to Import to Access, except you do not need to first create a file. The text file is imported directly into Microsoft Excel.

Now you are ready to use the data in a number of different programs, that accept a text file, a Microsoft Access file or a Microsoft Excel file.

The export list can also be merged with Microsoft Word.

SOS continues to be enhanced through user comments and ideas. Please email your suggestions to SoSSupport@ansintech.com or SoSrequest@ansintech.com

For more details about SOS visit our web site at
www.ansintech.com

SOS **How to export Member List** last reviewed July 2004
Technical support toll free number is 1-866-322-4539

Ansin Technology Group. © 1998-2004 All rights reserved
Proprietary and Confidential information