

How to Print Member Directory

Updated March 2011

- 1: Open **SOS** and click on **Reports and Labels**.
- 2: At the top of the screen, click **Options**, then **Member Reports**

REPORTS AND LABELS

File Options Help

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

Directory Set Up
Print Directory

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

Mr. Bob Jones

Custom Header for Reports

- Include Custom Report Header

Display What

- Member Number
- Mem Type
- Age
- Home Tel
- Email
- Member Attribute
- Birthday
- Anniversary
- Join Date
- Resign Date
- School/Gr.
- Occupation
- Renew Date

Sort By

- Member No.
- Last Name
- Birth Date
- BirthMonth/Day
- Occupation
- A1 Last Name
- A2 Last Name
- Anniv. Date
- Join Date
- Zip Code
- School

Sort Order

- Ascending Descending

Letter Date and Subject

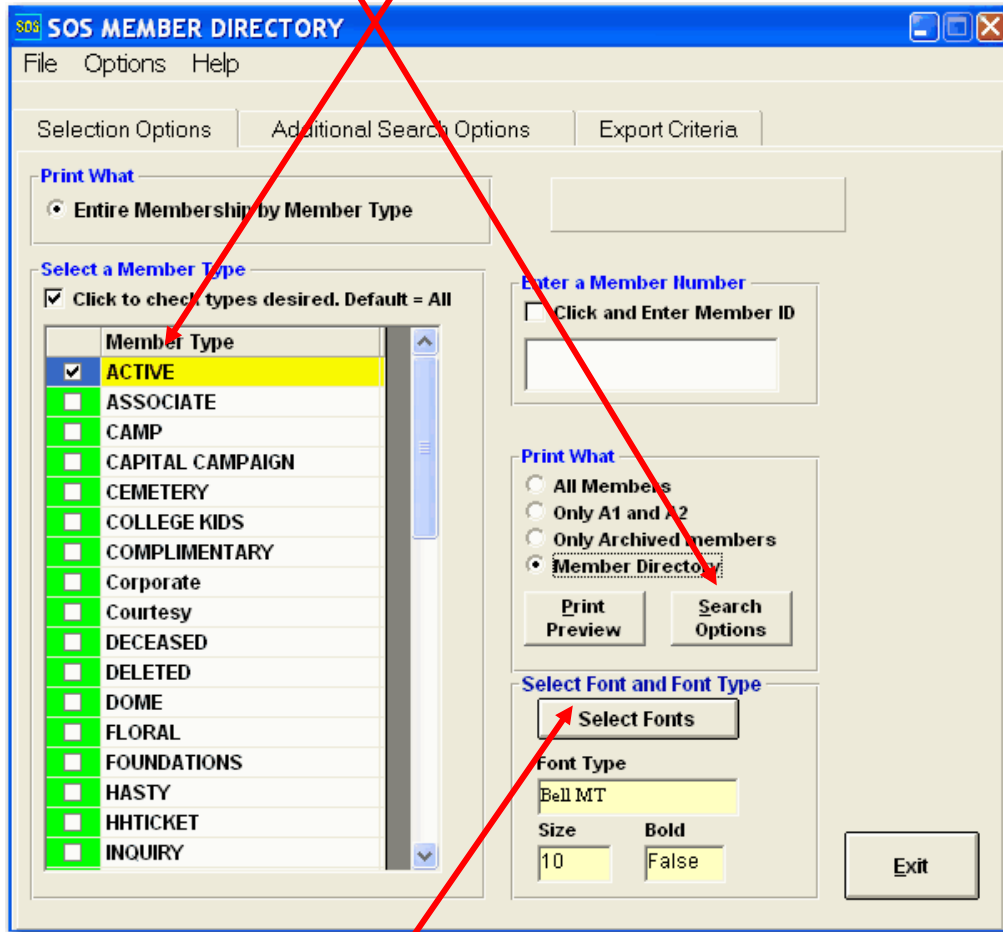
05/07/2007 Include Hebrew Date

19 Iyar 5767 Enter Subject Below:

Document Editor Print Preview Close

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- 3: Select one or multiple **Member Types**.
- 4: Select print What: Members Directory.
- 5: Click **Search options (see next page)**



- 6: To edit the Fonts, click on **Select Fonts**.
The options will display the Font Type, Font Bold, Font size
The setting are automatically saved for your next session.

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7: From the Search Options screen, select what to display.
The default is the member A1 and A2 name, address, and city state zip.

For example, to display Home telephone, check here.

Member Directory options

Member Directory Options

- Display Telephone
- Do Not Display Home Email
- Do Not Display Date of Birth
- Do Not Display Children
- Do Not Display Children's Last N.
- Do Not Display Business Tel
- Do Not Display Member #
- Do Not Display Member Type
- Do Not Display Business A1 / A2
- Do Not Display Cell Phones
- Do Not Display Email A1 / A2

Margins and Number Records

Left Margin

Height - Inches

Number Records per Column

A1 / A2 Member Options

- Names in Upper Case
- Show A1, A2 on one line

Accept and Close

To determine the number of records, displayed per column enter a number here. You can also change the left margin as well as the height of each record grouping.

To get the results that fit your needs, you may have to adjust the settings a few times (the results may vary between printer)

You can change the number of records to show in a column (Range is 5 to 12) and you can adjust the height of each member, including Name, address etc.)

Click Accept and Close and then print Preview.

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To export the similar information, please see last page.

The sorting is automatic by the Family name as entered on the General Family Screen

You can filter, by the **Anniversary Month / day**

You can filter by the **Age Range**

The screenshot shows the 'SOS MEMBER DIRECTORY' application window with the 'Export Criteria' tab selected. The interface is divided into several sections:

- Fields to be Displayed:** A list of checkboxes for 'Family Name', 'Address', 'Home Telephone', 'Email', and 'Member ID'. 'Family Name', 'Address', 'Home Telephone', and 'Email' are checked.
- Field to Export:** A list of checkboxes for 'Address', 'Telephone', 'Email', 'Cell Phone', 'Home Fax', 'Bus Telephone', 'Bus Fax', and 'Child DOB'. All are checked.
- Search Options (top):** A checkbox for 'Anniversary Month / Day' is unchecked. Below it, 'From' and 'To' date pickers are both set to '04/04/2008'.
- Search Options (bottom):** A checkbox for 'Age Range' is unchecked. Below it, 'Display Children' and 'Include all families' are also unchecked.
- Custom Header for Reports:** A checkbox for 'Include Custom Header or No Header' is checked. Below it, 'Left Align Header' is selected. To the right, 'Size Top' and 'Size Bottom' are both set to '10', and 'Margin' is set to '300'. Below these are three empty text input fields.
- Select Date Format:** Two radio buttons are present: '04/04/2008' (unchecked) and 'Friday, April 04, 2008' (checked).
- Page Number and Date:** A checkbox for 'Include Page Number and Date' is checked. Below it, 'Page Numbers On Bottom' is unchecked.

Three red arrows point from the text below to the 'Size Top' and 'Size Bottom' fields, the 'Select Date Format' section, and the 'Include Page Number and Date' checkbox.

The Top Header Font size and the Bottom Footer font size are edited here.

Select the date format here (as part of the bottom of each page)

Place page number on Bottom or top (toggle the flag)

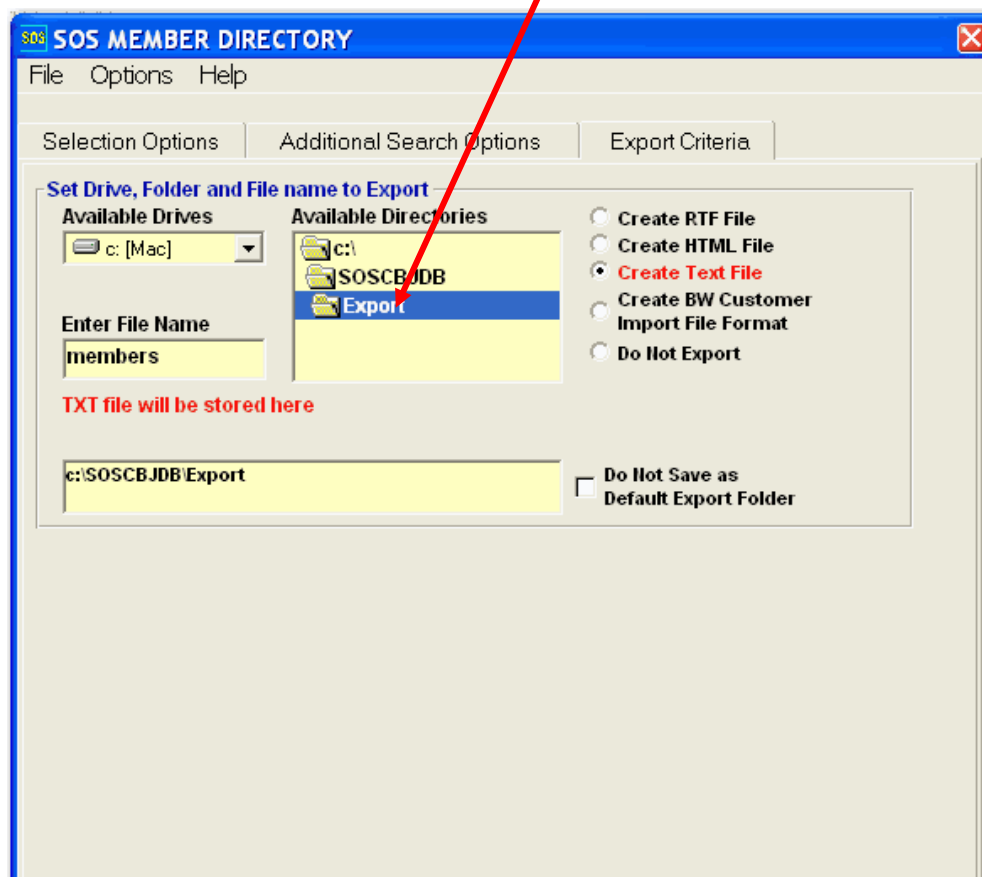
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8: Click on Selection options then click Print Preview

Once the report is rendered to the screen, you'll see each family together as a unit, with the children and additional information selected.

To export the member directory, select Create Text File. Then select the export type and select the folder to save the data to and enter a file name.

Then do a print preview, on the selection options tab. Once the report is rendered to the screen, the export file is created.



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

Technical support toll free number is 1-866-322-4530
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