

How to Print Member Donation Letters / Reports

Updated November 2010

Member Donation letters are created in the Management Reports

1: From General Family Screen, select Accounting, then Management Reports or use the F2 Hot Key.

Alternatively:

2: In Member Finance, Select View, Management Reports or use the F2 Hot key.

Step 1: Select Donations by Member Report # 3

Step 2: Click on the Layout option

There is a place to store notes for each report

IMPORTANT: Since this report is not normally run as frequently as other reports, we strongly suggest that you send the report to print preview. Print a few pages and compare the donations/payments as shown in the member account summary. This is done to be sure you have set all of the payment/donations parameters correct and to be sure all payments have been properly flagged.

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Select to print All Members or for a single member

Select the desired Payment Date range

Default is to get all Donations

The screenshot shows the 'DONATIONS BY MEMBER, #3' window with the following settings:

- Members to Display:** All Members, Members w/Invoices
- Date Range:** Range, All. Range: 01/01/2010 to 12/31/2010
- Member:** All Members
- Sort Member:** Sort Member No, Sort Last Name
- Show Member Totals:** Yes, No
- Print How:** Landscape, Portrait
- Style:** List Format, Letter/Label
- Display Preference:** Summary, Detail
- Export Data:** Yes, No
- Orientation:** Month for 1 Year, Quarter for 2 Yrs
- Address options:** Name, Address, Member #, Mem Type
- Group By:** Last Name, Mem Type
- Print Preview:**

To print Letters, based on the Date Range and Member (s) click the Letter option, a new screen appears. See next page

If you select List Format and Summary, the report prints one member per page and a total of Donations within the selected Date Range.

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Select the Option the meets your requirements. If sending letters, click the letter option.

Check the options to be displayed and enter the text to be incorporated in your letter.

IMPORTANT
Select whether to show Detail or just a total for the selected Date Range
Default shows all Detail.

Use this option to display your organization name and address at the top of the letter. Name and Address is edited in Program Administration

Select whether to display Donations only or both All Payments along with Donations

When ready, Click Print and the letters are created and sent to Print Preview. You are automatically returned to the Layout screen NOTE: If you do not see the print preview automatically, click on the Preview Tab

The screenshot shows the 'Letter and Label Printing' dialog box with the following settings:

- Print What:** Letter, Label, Mailing to Member
- Letter Options:**
 - Letter Date:** 01/10/2011
 - Letter Salutation:**
 - Header: Mr. Bob Jones
 - Dear: Mr. Jones
- Letter Subject:** Annual Donation Summary
- Letter Body:**
 - Include Paragraph 1: The following are the details of your donations to date.
 - Include Paragraph 2: Thank you
- Font:** Arial, 12
- Show Organization:** Yes, No
- Show Detail:** Yes, No
- Print By:** Members, 3rd Party
- Letter Display:** Donations only (Def), All Payments
- Show Margins:**
- Buttons:** Print, Close

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There are 4 fields that can be edited that show on the donation letters. Simply click in the green column, enter the changes, then press the Tab Key. You'll be prompted whether to save your changes.

Payment date

Payment Description

Donation

Donation Amt

The screenshot shows a window titled "Payments, Credits and Debits between 11/16/2007 and 11/18/2010". The window contains a table with the following columns: Inv #, Trans. Date, Inv #, Co, Post, Trans. Amt, Details, Description, Type, Inat, and FMV. The 'Trans. Date', 'Description', 'Details', and 'FMV' columns are highlighted in green. Below the table, there are search filters for 'From' (11/16/2007) and 'To' (11/18/2010), and radio buttons for 'Invoices by Date Range', 'Donations only', and 'Display Payments'. There is also a 'Balance Due' field showing '-1' and buttons for 'Print' and 'Close'.

The above screen is displayed from the View, then Account Summary (F9 hot key) or from the Member Financials, Click Account Summary button.

If you have any questions pertaining to the operation of SOS, please be sure to call technical support or email SOSsupport@ansintech.com

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