

## How to Print Member Donation Letters / Reports

January 2006

Member Donation letters are created in the Management Reports

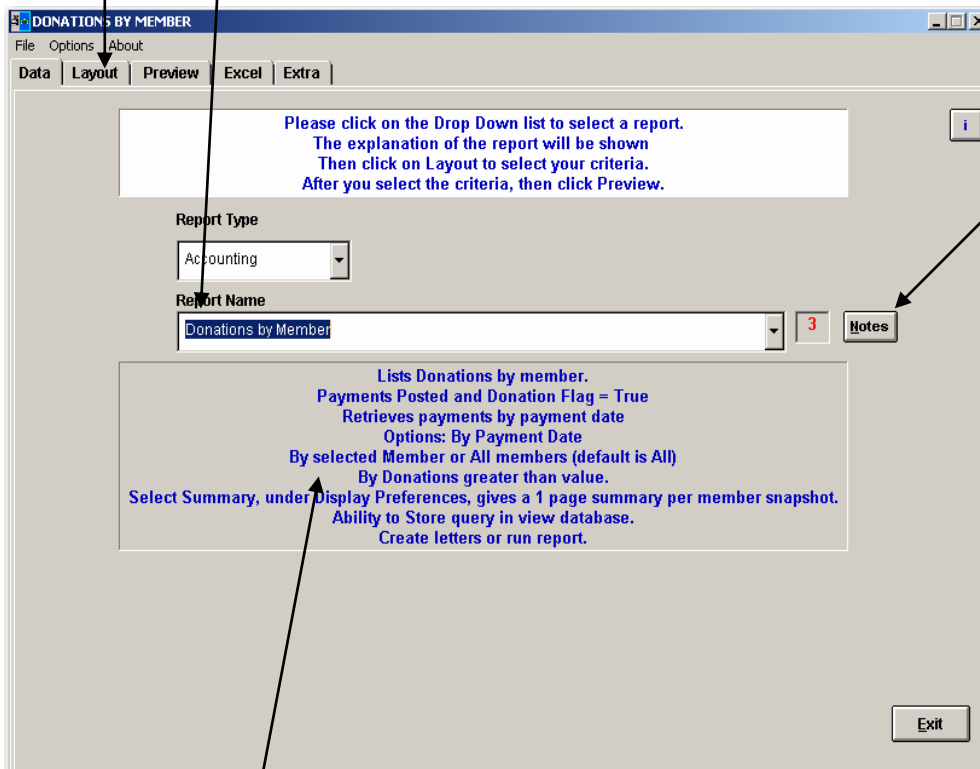
1: From General Family Screen, select Accounting, then Management Reports or use the F2 Hot Key.

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

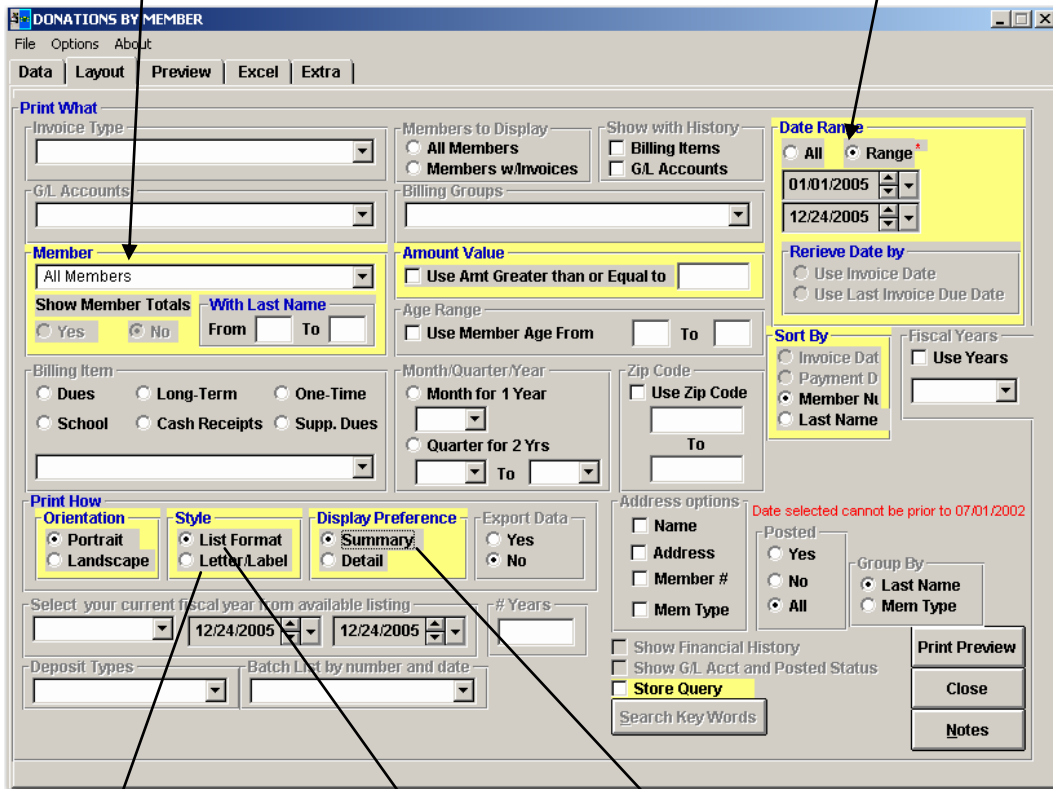
Each Report description is described here

**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.

Select to print All Members or for a single member

Select the desired Payment Date range

Default is to get all Donations



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.

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

There are 3 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

Inv #	Bal. Due	Trans. Date	Billing Item	Trans. Amt	Details	Description	Type	Donation
11453	\$ .00	12/15/2003	Library	\$18.00	179	Library	Cash Receipt	Y
11610	\$ .00	12/18/2003	Adult Retreat	\$420.00	184	Adult Retreat	Cash Receipt	N
12038	\$ .00	12/31/2003	Annual Fundraiser	\$500.00	190	Annual Fundraiser	Cash Receipt	Y
12968	\$ .00	02/02/2004	School Schol	\$18.00	5786	School Schol	Cash Receipt	Y
13523	\$ .00	02/27/2004	Library	\$15.00	201	Library	Cash Receipt	N
15722	\$ .00	05/24/2004	Big Sunday	\$100.00	5899	Big Sunday	Cash Receipt	Y
15985	\$ .00	06/01/2004	Shabbat Dinner	\$60.00	217	Shabbat Dinner	Cash Receipt	N
16734	\$ .00	08/12/2004	Standard Temple Due	\$1,575.00	CC	Temple Dues	Dues	Y
17351	\$ .00	08/12/2004	URJ Dues	\$150.00	CC	URJ Dues	Dues	Y
17968	\$ .00	08/12/2004	ARZA Dues	\$36.00	CC	ARZA	Supplemental	Y
20291	\$ .00	10/21/2004	Board Dinners 2005-I	\$120.00	9674		One Time	N
20668	\$ .00	08/13/2004	Enhanced Dues 2004	\$1,239.00	CC	Enhanced Dues	Supplemental	Y
21240	\$ .00	09/02/2004	School Schol	\$18.00	6051	School Schol	Cash Receipt	Y
24487	\$ .00	01/19/2005	Social Action Fund	\$18.00	6193	Social Action Fund	Cash Receipt	Y
24570	\$ .00	12/31/2004	Capital Campaign	\$1,000.00	376	Capital Campaign	Cash Receipt	Y
27740	\$ .00	03/31/2005	Library Fund	\$52.00	228	Library Fund	Cash Receipt	Y
28135	\$ .00	04/13/2005	Men's Club	\$900.00	CC	Men's Club	Cash Receipt	Y
28996	\$ .00	05/04/2005	Annual Fundraiser	\$350.00	233	Annual Fundraiser	Cash Receipt	Y
28997	\$ .00	05/04/2005	Annual Fundraiser	\$150.00	233	Annual Fundraiser	Cash Receipt	Y
29031	\$ .00	05/06/2005	Annual Fundraiser	\$72.00	232	Ads	Cash Receipt	Y

Select Date Range to search by

From: 11/19/03 To: 01/07/06

Invoices by Date Range  
 Donations only  
 Display Payments  
 Display Columns in Green

Balance Due: -1

Buttons: Refresh, Print, Close

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

SOS continues to be enhanced through user comments and ideas. Please email your suggestions to [SoSSupport@ansintech.com](mailto:SoSSupport@ansintech.com) or [SoSrequest@ansintech.com](mailto:SoSrequest@ansintech.com)

For more details about SOS visit our web site at [www.ansintech.com](http://www.ansintech.com)

SOS **How to print Member Donation letters** last reviewed December, 2005

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