

## SOS Statement

October 2007

Last updated, March 2008

The SOS Statement can be accessed from General Family Screen, select View (top of screen) then Member Statement. Or from Member Financials, select View (top of screen) then Member Statement.

The initial display is for the currently select member. You can change to any member type, then select a specific Family member from the Member Listing.

The Member Statement Default Settings are shown below:

The screenshot shows the 'SOS Statement' configuration window with the following settings:

- Filtering Options:** Member Types: All Member Types; Sort Options: Member # (Def); Member Listing: SHANSKY, Richard Shansky.
- Select Items to Include on Statement:** YES, use Main Screen Mailing Label; Payment Form: With CC; Display what: Due By Date; Inc Open Invoice List: checked; Header Font Size: 10; Show Graphics: checked; Print Billing Item (Def): unchecked; Display Aging: checked; Do Not Display Deposits: checked; Does NOT display Apply Payments: unchecked; 30.
- Notes Option:** Notes: unchecked; Font Size: 12; Top: 1200.
- Custom Settings Options:** Margin Left: 350; Invoices from top: 5200; To Add: 350; Statement: 5500; From Add: 350; Left: 600; Top: 2750; 600; 600.
- Organization:** Name / Address: checked; Phone / Fax: checked; Email / URL: checked; Show Statement: unchecked; Statement Date: unchecked; Format 07/01/2006: checked; 10/29/2007; Left: 8500; Top: 600; Font: 16.
- Print Options:** Print Statement for: Current Member; Print Sort By: Last Name; Sort Invoices by: Inv Num; Show Invoices by Due Date: Show All (Def) checked; Current Due Date: 10/29/2007; Include Archive Member: unchecked; Create Excel Report: unchecked; Exclude Long Term: unchecked; Do NOT display Total Due: unchecked; Records: 0.
- Disclaimer Notes:** Do Not Display Disclaimer: unchecked; File: ; Location: ; Save as default: button.
- Graphics Properties:** Do Not Display Graphic: unchecked; Picture: ; Location: ; Left: ; Top: ; Width: ; Height: ; Save as default: button.

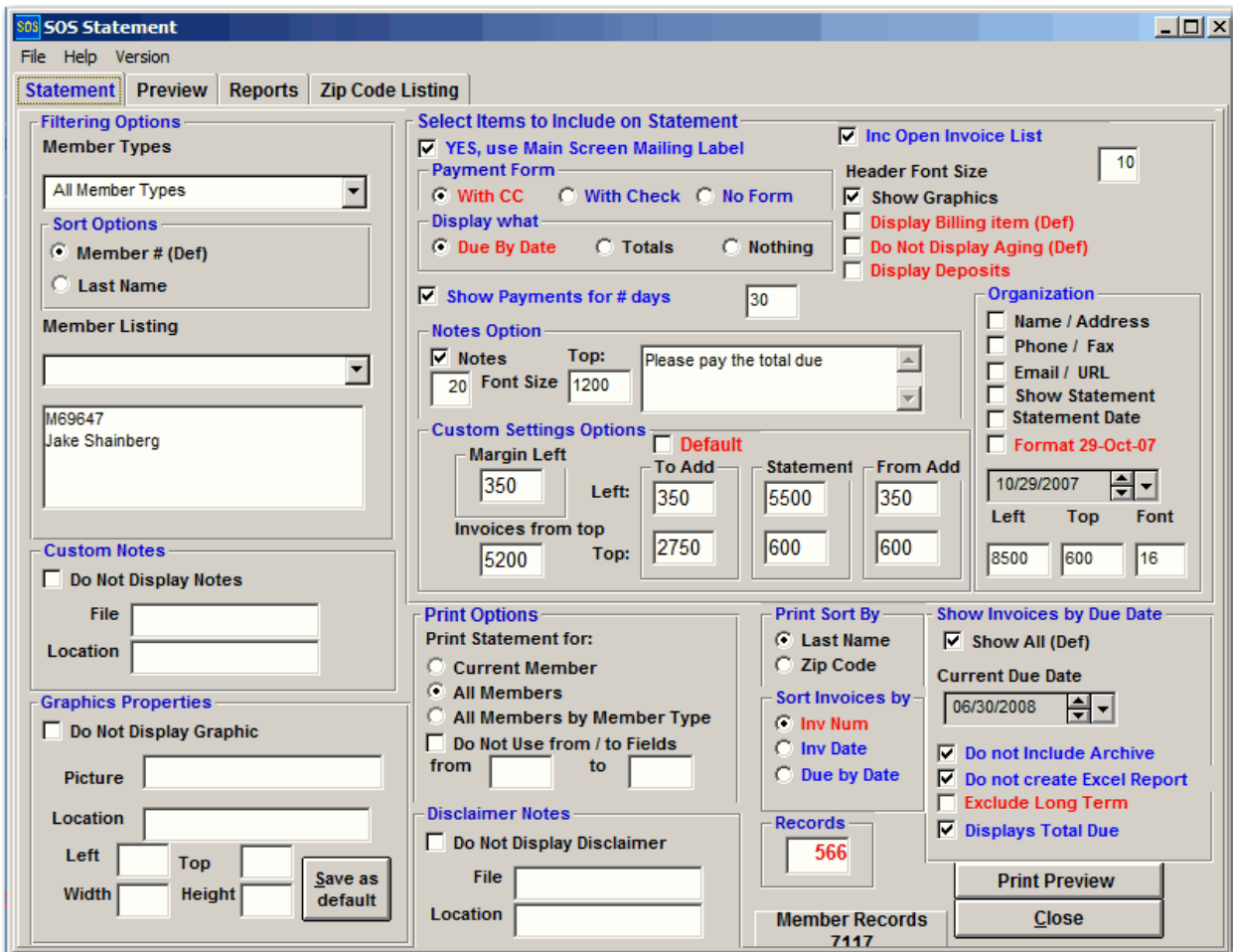
The settings you select are automatically saved as your personal criteria on your local PC. There are several options. To understand what each option will accomplish, try working with one setting and understand what it does.

This page displays typical settings based on the following:

- 1: use main screen mailing label
- 2: Use tear off at the bottom of the statement
- 3: Display by due date
- 4: Do not include send's name and address (the sender has pre-printed paper)
- 5: Do not include Aging of invoices
- 6: Display Deposits
- 7: Show payments made the last 30 days

Include custom note on statement

- 1: Do not include Long term invoices
- 2: Do not include Archive Members
- 3: all members (print only those with a balance due)  
Sorted by Last name  
Invoices sorted by Invoice Number
- 4: Show all due by 6/30/2008



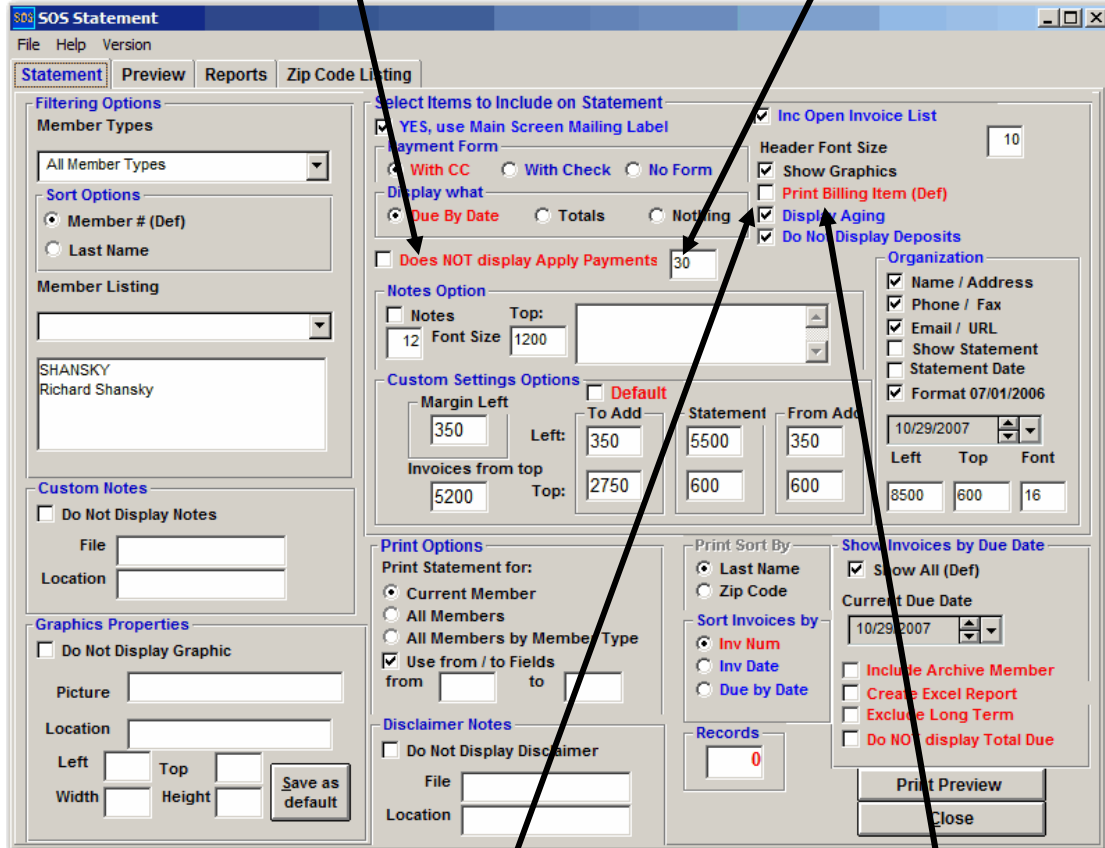
The next pages are designed to explain what some of the options mean.

The screenshot shows the 'SOS Statement' application window with several callout boxes pointing to specific options:

- Use this option to retrieve Members by Member Type**: Points to the 'Member Types' dropdown menu in the 'Filtering Options' section.
- Use this option to have the first line pull from the main screen mailing label**: Points to the 'YES, use Main Screen Mailing Label' checkbox in the 'Select Items to Include on Statement' section.
- Payment Form: Includes Credit Card and check #**: Points to the 'With CC' radio button in the 'Payment Form' section.
- Payment Form: Shows check only**: Points to the 'With Check' radio button in the 'Payment Form' section.
- Use this option to show no payment form.**: Points to the 'No Form' radio button in the 'Payment Form' section.
- Use this option to print or not to print an open invoice list on the bottom 1/3 of the member's statement. The list assist's the member to advise what they are**: Points to the 'Inc Open Invoice List' checkbox in the 'Select Items to Include on Statement' section.

Check this option to display a schedule of payments, within the number of days shown.

Number of days, from the statement date, to display payment history. (max 365 days)



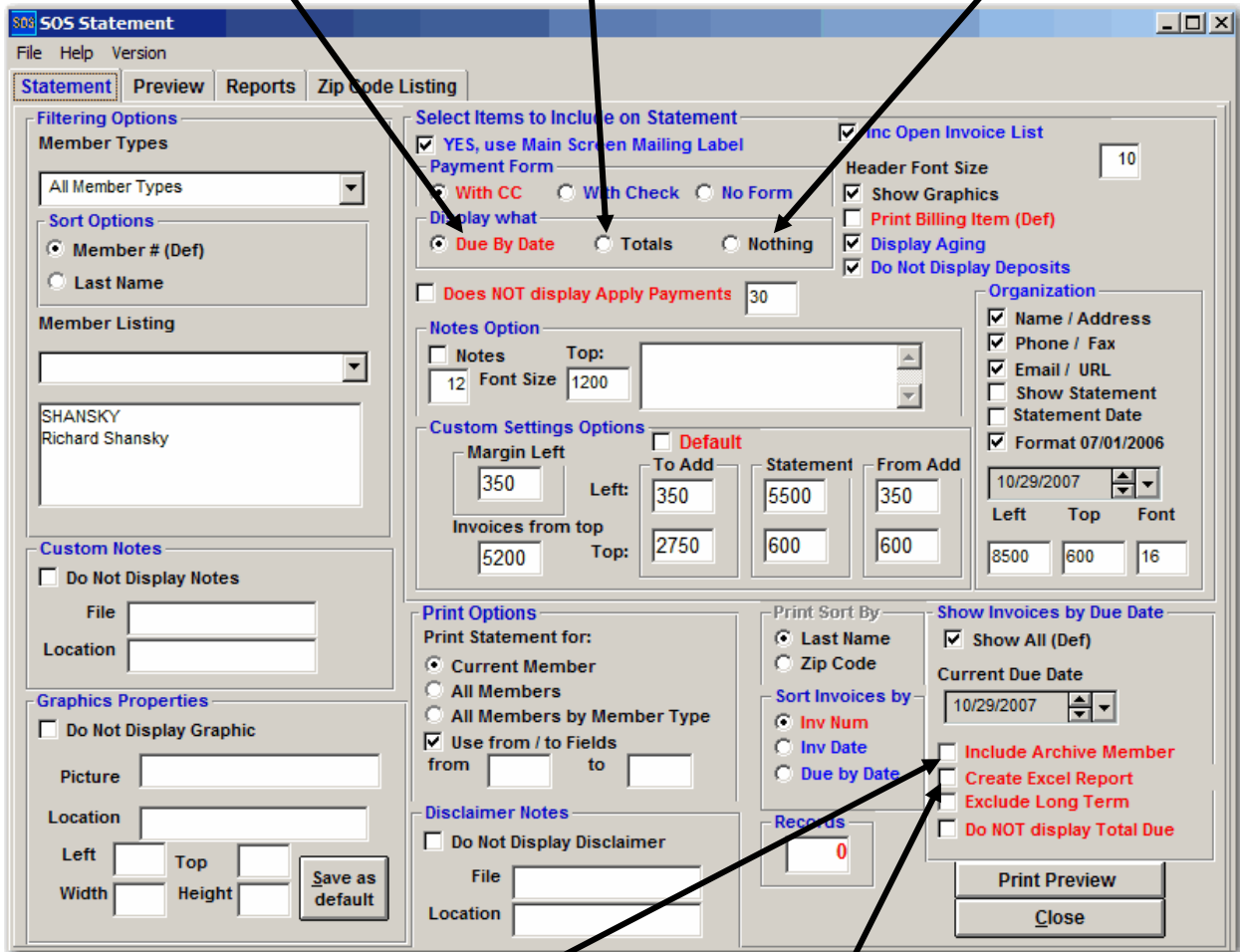
Check this option to display a member's account aging. Leave **unchecked** and no aging is displayed.

Leave this option **unchecked** to display the billing item used when creating the charge. If you check it, the statement shows the custom description.

Use this option to display the last due date, per invoice.

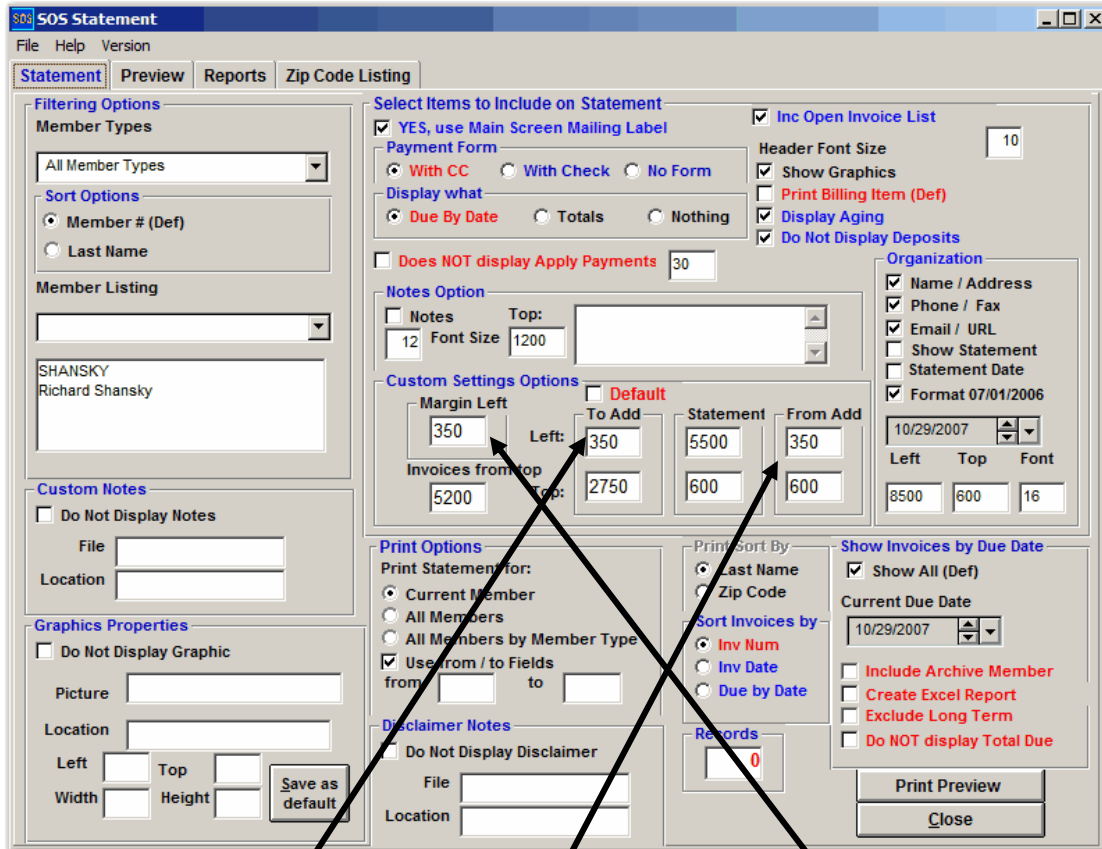
Use this option to display what's been billed to date, based on the installment plan.

Use this option to leave the column blank



Check this option, to not include archive members. Uncheck the option and archive members are included

Use this option to create an excel type summary after the statements are sent to print preview. The summary is on the reports tab.



Determines the location of the To address and the From Address

Determines the location where the date is place don the statement.

Determines the location Invoice list

## **Display Graphic**

To display a graphic on the preview screen, please un-check these settings.

The screenshot shows the 'SOS Statement' application window with several tabs: 'Statement', 'Preview', 'Reports', and 'Zip Code Listing'. The 'Statement' tab is active, showing various configuration options. Two red circles highlight specific settings:

- The first circle is around the 'Display Graphic' checkbox in the 'Graphics Properties' section, which is currently checked.
- The second circle is around the 'Graphics Properties' section, which includes fields for 'Picture' (set to 'atglogo.gif'), 'Location' (set to 'c:\sosp\proj\new'), and dimensions: 'Left' (.3), 'Top' (.2), 'Width' (80), and 'Height' (80). A 'Save as Default' button is also present.

Other visible settings include 'Filtering Options' (Member Types: All Member Types, Sort Options: Member # (Def)), 'Select Items to Include on Statement' (YES, use Main Screen Mailing Label, Inc Open Invoice List, Show Graphics, Print Custom Description, Display Aging, Display Deposits), 'Notes Option' (Notes: 12, Font Size: 1200), 'Custom Settings Options' (Margin Left: 350, Invoices from top: 5200), 'Print Options' (Print Statement for: Current Member, Use from / to Fields), and 'Show Invoices by Due Date' (Show All (Def), Current Due Date: 01/05/2008).

Next insert the picture name here and the path to the picture.

### **Be sure to save your results as default.**

The settings are entered here. You will most likely have to tweak your settings before the display is what you want.

See the next page for what the preview screen will look like.

The Left and Top settings are inches.  
The Height and width are a %.

**Preview results**

**ATG**  
ANSIN TECHNOLOGY GROUP

**Statement** 06/02/2008

Abbate  
Marcia Weissmann & Mark Abbate  
83 Main Street  
Norfolk, MA 02056

Account Description	Inv #	Inv Date	Total Billed	Due by	Payments	Adjustment	Due
Member Dues 07-08 Two Parent	3291	08/01/2007	1,830.00	06/30/2008	500.00	.00	.00
Building Maintenance Fee 07-08	3469	08/01/2007	200.00	06/30/2008	.00	.00	.00
Building Maintenance Fee 07-08	3684	05/10/2008	200.00	09/07/2008	.00	.00	.00

Currently Due .00  
**Total Due 1,730.00**

1-30 Past due	31-60 Past due	61-90 Past due	over 90 Past due
0.00	0.00	0.00	0.00

Payments Details: (All Payments made within 30 days PRIOR to the date of this statement.)

Payment Description	Inv #	Date	Amount	Method
Academy Fee	3719	05/28/2008	1.00	Credit Card

**Technical Support:**

If you have any problems or questions pertaining to the operation of SOS, please be sure to call technical support or email [SOSsupport@ansintech.com](mailto:SOSsupport@ansintech.com)

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