

# SOS Statement

December 2010

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 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.

The screenshot shows the 'SOS Statement version # 8.17.0.2' application window. The interface is divided into several sections:

- Filtering Options:** Includes 'Member Types' (set to 'All Member Types'), 'Sort Options' (set to 'Member # (Def)'), and 'Member Listing' (showing member 'T99999 Leonard Ansin').
- Select Items to Include on Statement:** Includes checkboxes for 'YES, use Main Screen Mailing Label', 'List Installments', 'Show Graphics', 'Display Billing item (Def)', 'Do Not Display Aging (Def)', and 'Display Deposits'. It also has radio buttons for 'Payment Form' (With CC, With Check, No Form) and 'Display what' (Due By Date, Nothing, Totals).
- Custom Settings Options:** Includes 'Show Payments for # days' (30), 'Notes Option' (Notes, Font Size 12, Top 1200), and a 'Custom Settings Options' table:

Margin Left	To Add	Statement	From Add
350	350	5500	350
Invoices from top	Top		
5200	2750	600	600
- Organization:** Includes checkboxes for 'Name / Address', 'Phone / Fax', 'Email / URL', 'Show Statement', 'Statement Date', and 'Format 07/01/2006'. It also has a date field (03/11/2011) and a table for 'Left', 'Top', and 'Font' settings.
- Print Options:** Includes 'Print Statement for:' (Current Member, All Members, All Members by Member Type), 'Print Sort By:' (Last Name, Zip Code), and 'Sort Invoices by:' (Inv Num, Inv Date, Due by Date).
- Disclaimer Notes:** Includes a checkbox for 'Do Not Display Disclaimer' and fields for 'File' and 'Location'.
- Graphics Properties:** Includes a checkbox for 'Do Not Display Graphic' and fields for 'Picture', 'Location', 'Left', 'Top', 'Width', and 'Height'.
- Show Invoices by Due Date:** Includes checkboxes for 'Show All (Def)', 'Show Column as Due', 'Include Archive Member', 'Create Excel Report', 'Include all Invoice Types', and 'Do NOT display Total Due'. It also has a 'Current Due Date' field (08/18/2011) and a 'By Inv type' dropdown.

Buttons for 'Print Preview' and 'Close' are located at the bottom right of the window.

# SOS Statement

This page displays typical settings:

The screenshot shows the 'SOS Statement version # 8.17.0.2' application window. The interface is divided into several sections with various options and controls. Callout boxes point to specific settings:

- Use tear off at the bottom of the screen:** Points to the 'Statement' tab in the top menu bar.
- Use Main Screen label:** Points to the 'YES, use Main Screen Mailing Label' checkbox under 'Select Items to Include on Statement'.
- Do not Include Aging of Invoices:** Points to the 'Do Not Display Aging (Def)' checkbox under 'Display what'.
- Display Deposits:** Points to the 'Display Deposits' checkbox under 'Display what'.
- Use Installments or List by Invoice:** Points to the 'List Installments' checkbox under 'Display what'.
- Show payments made last 30 days:** Points to the 'Show Payments for # days' field set to 30.
- Do not include send's name and address (the sender has pre-printed paper) Leave Unchecked:** Points to the 'Name / Address' checkbox under 'Organization'.
- Show By Invoice Type:** Points to the 'By Inv type' dropdown menu under 'Show Invoices by Due Date'.
- uncheck to include Archive Members:** Points to the 'Include Archive Member' checkbox under 'Show Invoices by Due Date'.
- Show By Due date:** Points to the 'Due by Date' radio button under 'Print Sort By'.

# SOS Statement

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

Check this option to print an open invoice list on the bottom 1/3 of the member's statement. Uncheck this option to List Installments..

Use this option to retrieve Members by Member Type

Use this option to have the first line pull from the main screen mailing label

Payment Form: Includes Credit Card and check #

Payment Form: Shows check only

Use this option to show no payment form.

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- Filtering Options:** Includes 'Member Types' (set to 'All Member Types'), 'Sort Options' (set to 'Member # (Def)'), and 'Member Listing' (showing 'T99999 Leonard Ansin').
- Select Items to Include on Statement:**
  - YES, use Main Screen Mailing Label
  - With CC
  - With Check
  - No Form
  - List Installments
- Display what:**  Due By Date,  Nothing,  Totals
- Show Payments for # days:** 30
- Notes Option:**  Notes, Top: [ ], Font Size: 12
- Custom Settings Options:** Margin Left: 350, Invoices from top: 5200, To Add: 350, Statement: 5500, From Add: 350, 600, 600.
- Organization:**  Name / Address,  Phone / Fax,  Email / URL,  Show Statement,  Statement Date,  Format 07/01/2006.
- Print Options:**  Current Member,  All Members,  All Members by Member Type,  Use from / to Fields.
- Print Statement for:**  Last Name,  Zip Code
- Sort Invoices by:**  Inv Num,  Inv Date,  Due by Date
- Show Invoices by Due Date:**  Show All (Def),  Include Archive Member,  Create Excel Report,  Include all Invoice Types,  Do NOT display Total Due.
- Records:** 0

Callout boxes point to specific options: 'All Member Types' (to retrieve members by type), 'YES, use Main Screen Mailing Label' (to pull from main screen), 'With CC' (to include credit card and check #), 'List Installments' (to show open invoice list), 'Due By Date' (to show no payment form), and 'Show Statement' (to show check only).

# SOS Statement

The screenshot shows the 'SOS Statement version # 8.17.0.2' window. It features a menu bar (File, Help, Version) and a tabbed interface with 'Statement', 'Preview', 'Reports', and 'Zip Code Listing' tabs. The 'Statement' tab is active, displaying various configuration sections:

- Filtering Options:** Member Types (All Member Types), Sort Options (Member # (Def), Last Name), Member Listing (T99999, Leonard Ansin).
- Select Items to Include on Statement:** YES, use Main Screen Mailing Label Payment Form (checked); With CC (checked), With Check, No Form; List Installments (10); Header Font Size (10); Show Graphics (checked); Display Billing item (Def) (unchecked); Do Not Display Aging (Def) (unchecked); Display Deposits (unchecked).
- Display what:** Due By Date (checked), Nothing, Totals.
- Notes Option:** Show Payments for # days (30); Notes (12), Font Size (1200).
- Custom Settings Options:** Margin Left (350), Invoices from top (5200), To Add (350), Statement (5500), From Add (350), Invoices (600), Font (600).
- Print Options:** Print Statement for: Current Member (checked), All Members, All Members by Member Type; Use from / to Fields (checked); Print Sort By: Last Name (checked), Zip Code; Sort Invoices by: Due by Date (checked); Records (0).
- Disclaimer Notes:** Do Not Display Disclaimer (unchecked); File, Location.
- Organization:** Name / Address, Phone / Fax, Email / URL, Show Statement (checked), Statement Date, Format 07/01/2006, 03/11/2011, Left (8500), Top (600), Font (16).
- Show Invoices by Due Date:** Show All (Def) (checked), Current Due Date (08/18/2011), By Inv type, Show Column as Due (checked), Include Archive Member, Create Excel Report, Include all Invoice Types, Do NOT display Total Due.
- Graphics Properties:** Do Not Display Graphic (unchecked); Picture, Location, Left, Top, Width, Height, Save as default.

Four callouts provide instructions for specific options:

- Top-left callout:** Check this option to display a schedule of payments, within the number of days shown. (Points to 'Show Payments for # days')
- Top-right callout:** Number of days, from the statement date, to display payment history. (max 365 days) (Points to the '30' value in 'Show Payments for # days')
- Bottom-left callout:** Check this option to display a member's account aging. Leave **unchecked** and no aging is displayed. (Points to 'Do Not Display Aging (Def)')
- Bottom-right callout:** Leave this option **unchecked** to display the billing item used when creating the charge. If you check it, the statement shows the custom (Points to 'Display Billing item (Def)')

# SOS Statement

The screenshot shows the 'SOS Statement' software interface with several callouts explaining key options:

- Callout 1:** "Use this option to display the last due date, per invoice." - Points to the **Due By Date** radio button in the **Display what** section.
- Callout 2:** "Use this option to display what's been billed to date, based on the installment plan." - Points to the **With CC** radio button in the **Payment Form** section.
- Callout 3:** "Use this option to leave the column blank" - Points to the **Do NOT display Total Due** checkbox in the **Show Invoices by Due Date** section.
- Callout 4:** "Check this option, to not include archive members. Uncheck the option and archive members are included" - Points to the **Include Archive Member** checkbox in the **Show Invoices by Due Date** section.
- Callout 5:** "Use this option to create an excel type summary after the statements are sent to print preview. The summary is on the reports tab." - Points to the **Create Excel Report** checkbox in the **Show Invoices by Due Date** section.

The interface includes sections for **Filtering Options**, **Sort Options**, **Member Listing**, **Custom Notes**, **Graphics Properties**, **Print Options**, **Disclaimer Notes**, **Organization**, and **Show Invoices by Due Date**.

# SOS Statement

The screenshot shows the 'SOS Statement version # 8.17.0.2' application window. The interface is divided into several sections:

- Filtering Options:** Member Types (All Member Types), Sort Options (Member # (Def), Last Name), Member Listing (T99999, Leonard Ansin).
- Select Items to Include on Statement:** YES, use Main Screen Mailing Label; Payment Form (With CC, With Check, No Form); Display what (Due By Date, Nothing, Totals); Show Payments for # days (30); Notes Option (Notes: 12, Font Size: 1200); Custom Settings Options (Margin Left: 350, Invoices from top: 5200, To Add: 350, Statement: 5500, From Add: 350, 600).
- Organization:** Name / Address, Phone / Fax, Email / URL, Show Statement, Statement Date, Format 07/01/2006, Date: 03/11/2011, Left: 8500, Top: 600, Font: 16.
- Print Options:** Print Statement for (Current Member, All Members, All Members by Member Type); Use from / to Fields; Disclaimer Notes; Print Sort by (Last Name, Zip Code, Inv Num, Inv Date, Due by Date); Show Invoices by Due Date (Show All (Def), Current Due Date: 08/18/2011, By Inv type); Show Column as Due, Include Archive Member, Create Excel Report, Include all Invoice Types, Do NOT display Total Due.
- Graphics Properties:** Do Not Display Graphic, Picture, Location, Left, Top, Width, Height, Save as default.

Determines the location of the To address and the From Address

Determines the location where the date is placed on the statement.

Determines the location Invoice list

# SOS Statement

## Display Graphic

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

The screenshot shows the 'SOS Statement version # 8.17.0.2' window. The 'Organization' section on the right has a red circle around it, containing the following checked items: 'Show Statement', 'Statement Date', and 'Format 07/01/2006'. The 'Graphics Properties' section at the bottom left has an arrow pointing to it, showing 'Display Graphic' checked, 'Picture' set to 'atglogo.gif', and 'Location' set to 'C:\SOSPictures'. The 'Margin Left' is 350, 'Invoices from top' is 5200, 'To Add' is 350, 'Statement' is 5500, 'From Add' is 350, 'Invoices from top' is 5200, and 'Top' is 2750. The 'Print Options' section shows 'Print Statement for:' set to 'Current Member' and 'Use from / to Fields' checked. The 'Print Sort By' section shows 'Last Name' selected. The 'Show Invoices by Due Date' section shows 'Show All (Def)' checked and 'Current Due Date' set to '08/18/2011'. The 'Records' section shows '0' records. The 'Print Preview' and 'Close' buttons are at the bottom right.

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 %.

# SOS Statement

## 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	3489	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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