

# OurChapter.org

#### Report and Exporting function.

This presentation will show you how to use the "Report" function for this Website.

- Select from different membership types and dues status.
- Multiple graphical chart types, including weblinks.
- Member Photos PDF with multiple sizes.
- Customize PDF reports, up to 4 lines per member.
- Export your member roster to an Excel Spreadsheet.
- Create mailing address labels for your members, with options.
- Export your member roster to a Export or JSON formatted file. This is used to import into another chapter.
- > Includes photos from the membership roster function.
- Create a list emails that can be copies and pasted into your personal email application.

This website is FREE to use with any chapter.

All information entered is STRICTLY kept confidential. \*\*

#### Don White – March 6, 2024

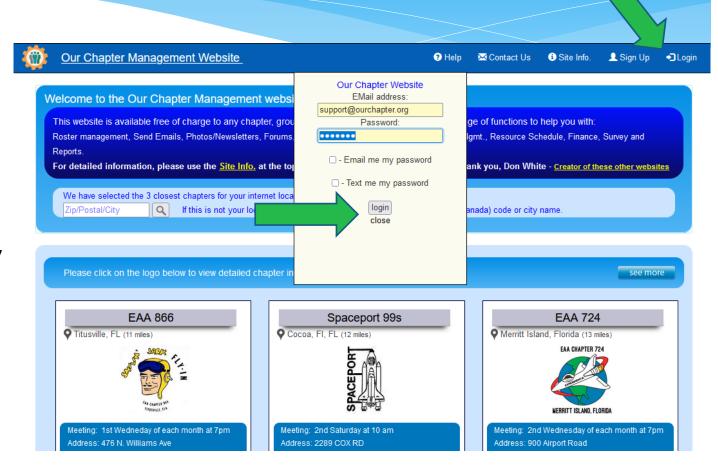
Designer and developer of YoungEaglesDay.org, EAABuildersLog.org and FlyingStart.org websites.

\*\* We do not distribute, market, sell or use your information outside of this website in any way. All member and chapter information is kept confidential to that chapter and/or organization.



# Reports – First Login.

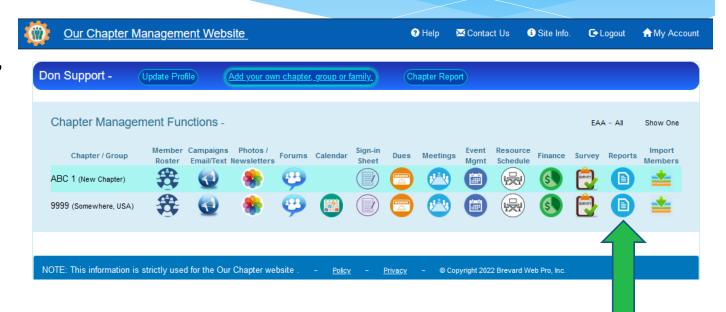
- 1. Use the "Login" link at the top right to Login into the website.
- **2.** Fill out your email and password and click the "Login" button in the window box.





# Reports – Getting Started

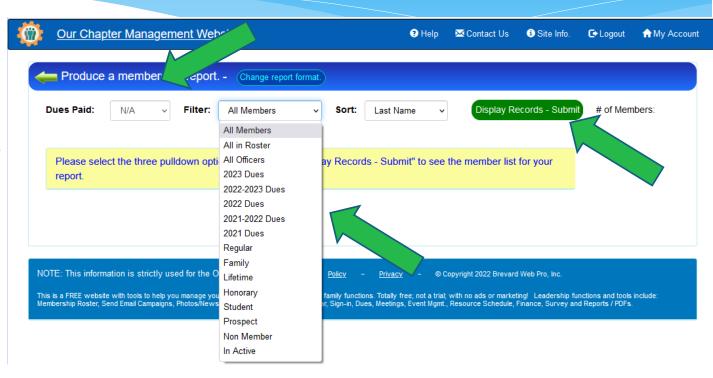
- **1.** To add or manage meeting information, just click on the "Reports" icon.
- 2. Other Reports are found it other functions, such as "Sign-In Sheet", "Dues", "Finance", etc.





# Reports - Options

- **1.** The function will create custom Reports via a PDF file or Excel spreadsheet.
- 2. You can select "Dues Paid" filter, Group Filter and the sort order for your Reports.
- **3.** Click the "Display Records" button to continue.





## Reports – Options



- **1.** A list of your members will be shown.
- 2. You can select
  "Charts", "Excel
  File", "PDF File",
  "Photo PDF",
  "Emails", "VCF",
  "Export" or
  "Mailing" button to
  create a report for
  those members.
- **3.** We will click the "PDF File" button.

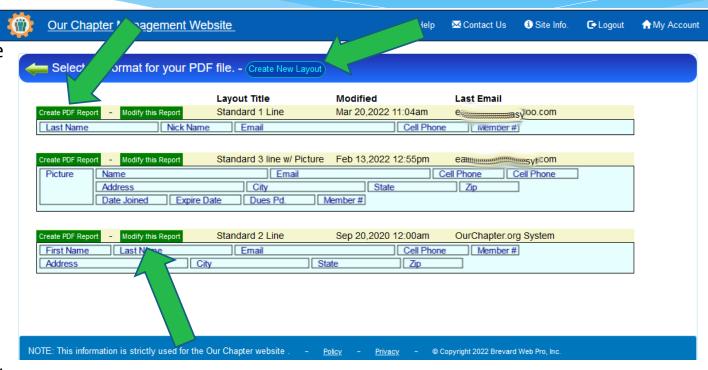


**4.** The Export button will create a Export or JSON formatted file. This is used to easily import your members into anther chapter or to save members.



#### Reports – Options

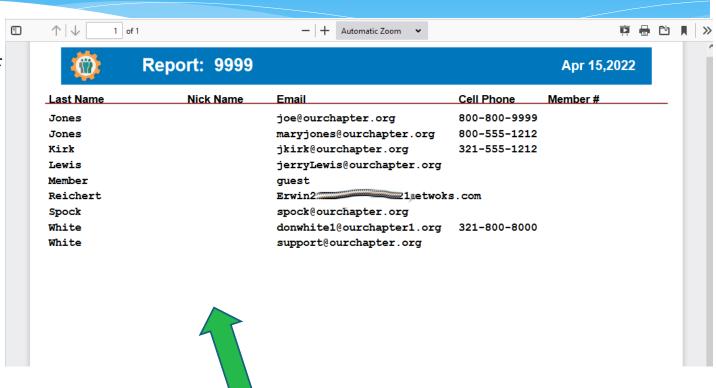
- **1.** Just select the type of PDF layout that you want by clicking the "Create PDF Report" button by the layout.
- **2.** If you want to modify that layout, click on "Modify This Report" button.
- **3.** If you want to create a new layout, click the "Create New Layout" button at the top.
- **4.** We will show you the "Create PDF Report" button now.





# Reports – Simple PDF

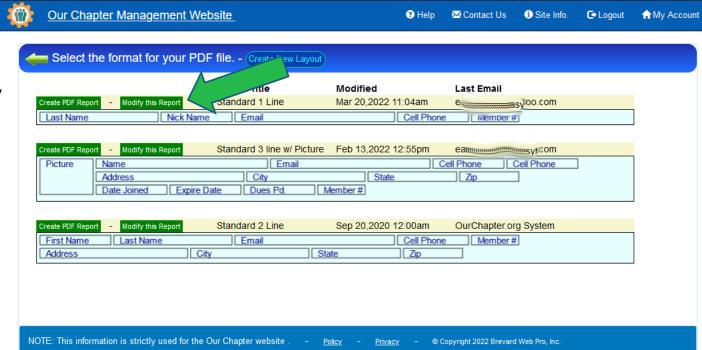
**1.** This is a simple PDF Report by selecting the first layout.





# Reports - Modify a Layout

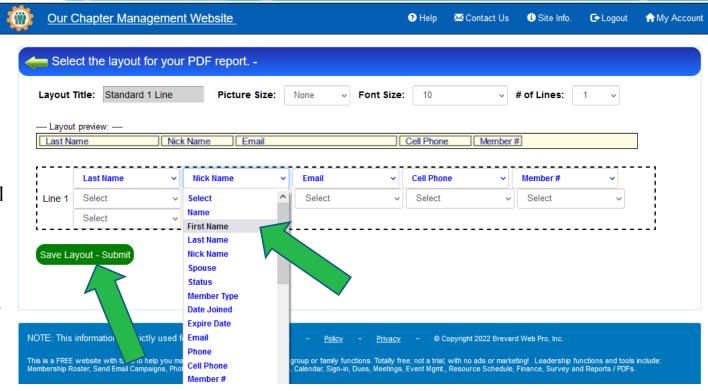
1. Since we do not have any "Nick Names", lets "Modify this Report by clicking on the "Modify this Report" button.





### Reports - Options

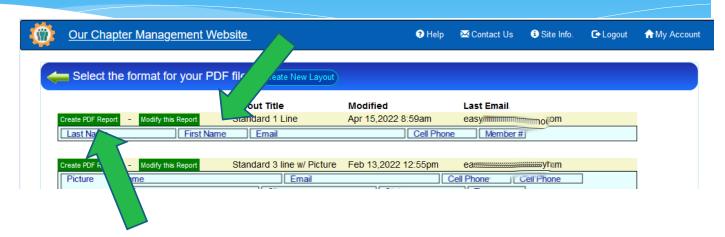
- **1.** Use the pull down field called "Nick Name".
- 2. Select the "First Name" and the "Layout preview" will change.
- **3.** Chick the "Save Layout" button to return to your report.

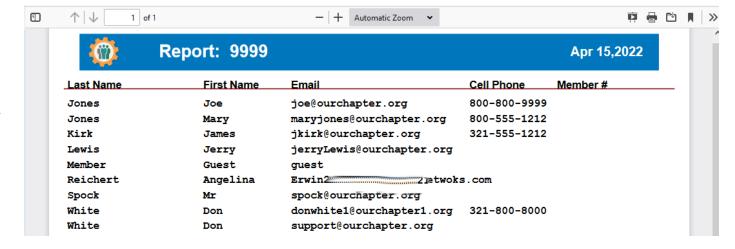




# Reports – Modified Layout

- **1.** You will see the modified Layout with the "First Name" now.
- **2.** Select the "Create PDF Report" to see the new report.
- **3.** This is what the new Report will look like. →

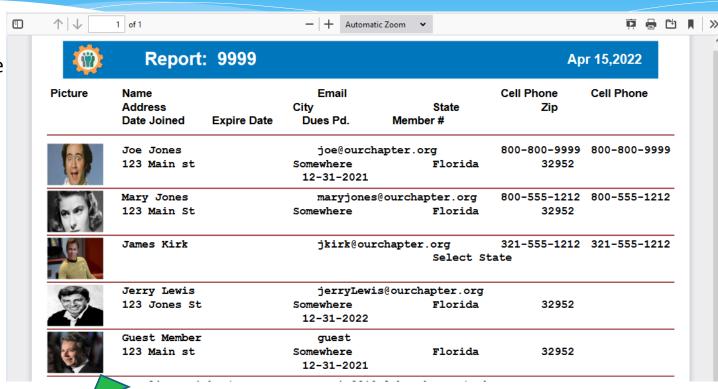






#### Reports – Member Picture

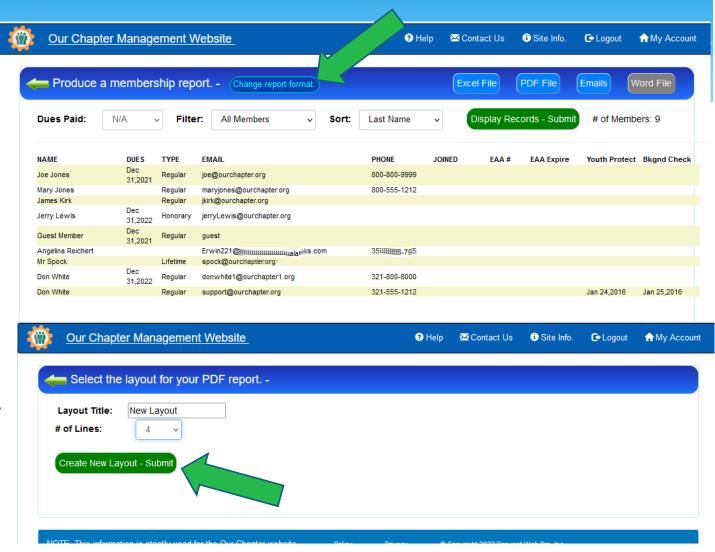
**1.** This is an example of the three line report with the member's picture.





# Reports – New Layout

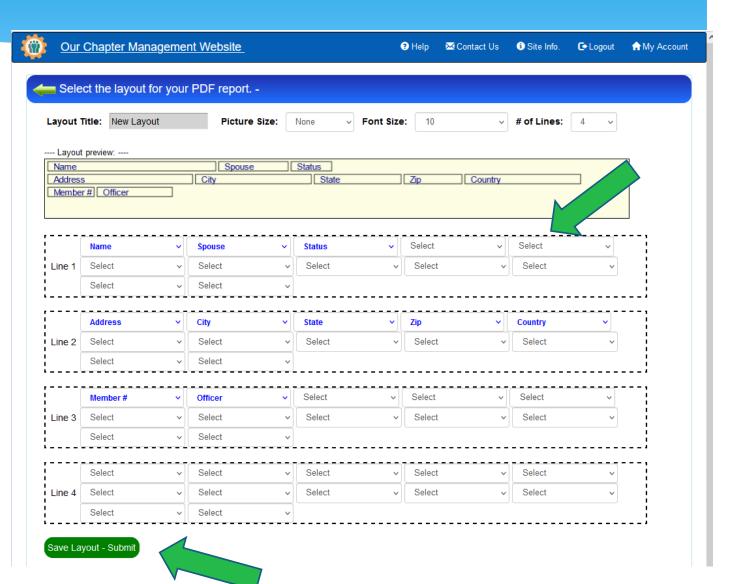
- 1. To create a new layout, click on the "Change Report Format" button at the top.
- **2.** Enter your Layout Title and the number of lines.
- **3.** Chick the "Create New Layout" button.





# Reports – New Layout

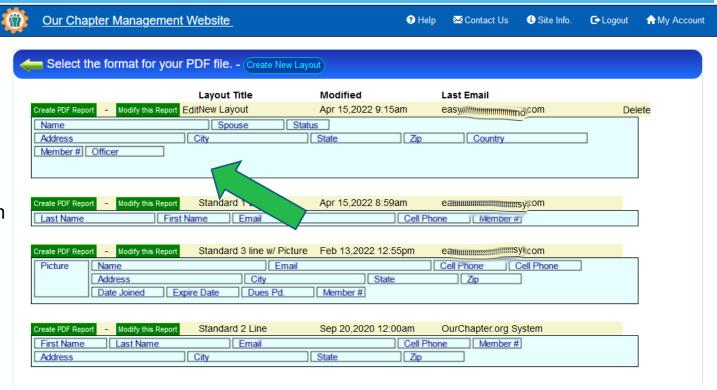
- **1.** Use the pull downs to select each file and position that you want the new layout be positioned.
- **2.** When done, click the "Save Layout" button at the bottom.





# Reports - New Layout

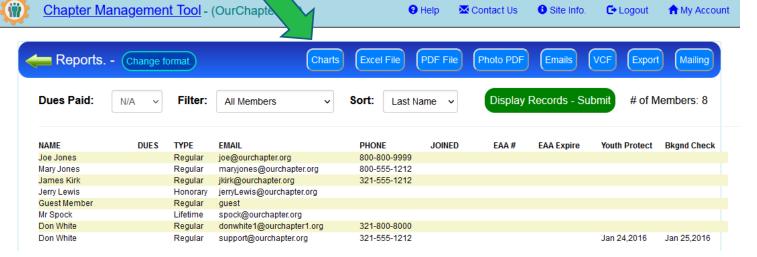
- **1.** The new Layout will be available to create a new PDF report.
- **2.** Click the left green arrow icon to return to the "Reports" main page.





# Reports – Charts

- **1.** To view the "Excel File", use that button at the top of the page.
- 2. This will create an "Excel Spreadsheet" file that you can download to your system.



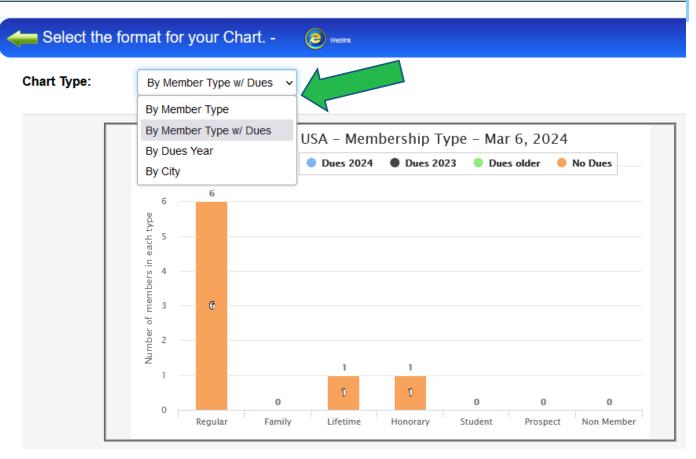


#### Reports – Charts



Help

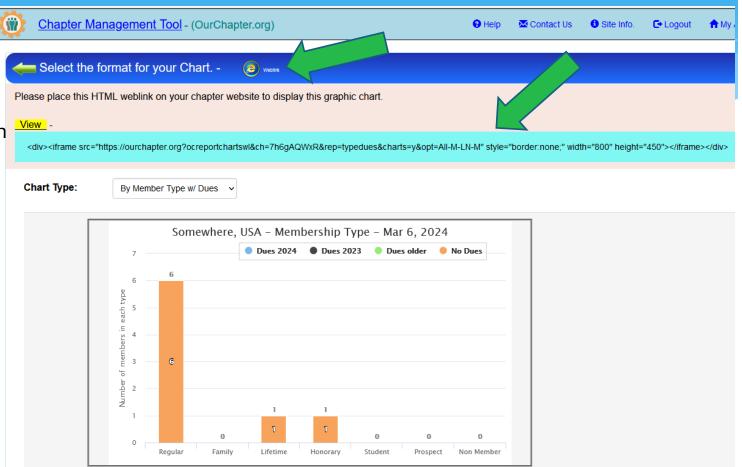
- **1.** This will display the first Chart Type.
- **2.** You can also select several other Chart Types with this pull down option.





## Reports – Charts - Weblink

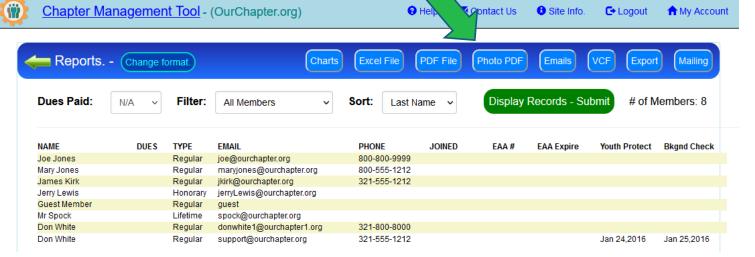
- **1.** You can select the "Weblink" icon to display the link.
- 2. Just copy and paste the HTML in the cyan shaded area into your chapter website. This will display this chart on your chapter website.





#### Reports – Photo PDF

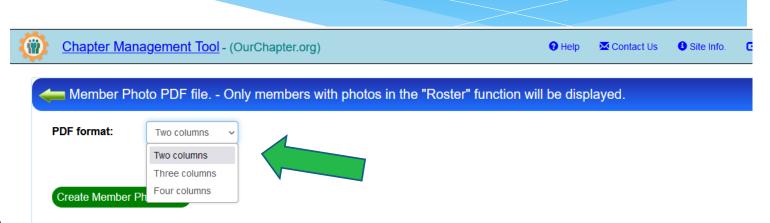
- 1. To view the "Photo PDF", use that button at the top of the page.
- **2.** This will bring you to the Photo PDF option page.





#### Reports – Photo PDF

- 1. To view the "Photo PDF", select the PDF format and press the "Create Member Photo PDF" button.
- **2.** This will create the Photo PDF page.



# Reports – Photo PDF - Sample

Zoom Out

Somewhere, USA

Provided by: OurChapter.org - Mar 06, 2024

- **1.** This is a sample Photo PDF file.
- **2.** You can download this PDF and save it on your local computer.



**Mary Jones** 



**Guest Member** 



James Kirk





Mr Spock





#### Reports – Excel File

1. To view the "Excel File", use that button at the top of the page.

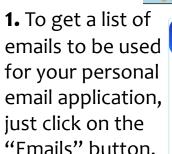
2. This will create an "Excel Spreadsheet" file that you can download to your system.





## Reports – Email list

Chapter Management Tool - (OurChapter.org)





**C**→ Logout

♠ My Account

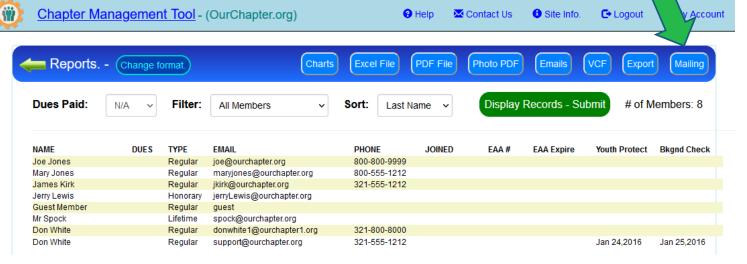
2. This is your list of emails that you can copy and paste. →





# Reports – Mailing Address Labels

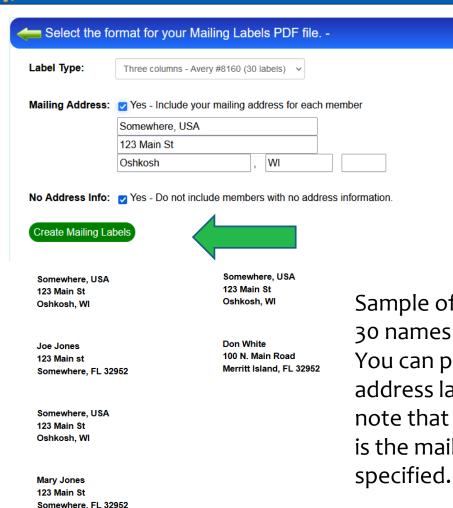
1. To get a PDF so you can print mailing address labels, just click on the "Mailing" button.





# Reports – Mailing Address Labels

- **1.** Fill out the information on this page.
- 2. By clicking on the "Create Mailing Labels" button, you will get PDF formatted for mailing labels.



**Our Chapter Management Website** 

Sample of PDF with up to 30 names and addresses. You can print this PDF on address labels. Please note that every other label is the mailing address you specified.

M Contact Us

Site Info.

**□** Logout

# Conclusion / Questions

- \* Questions / Comments: Use the "Contact Us" link
- \* Best free website for organizations to manage and grow memberships.