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Members - Search Form

The Members Search form was designed for more flexible searching.

At the top of the Members screen. You can change the {Search Form} dropdown to scroll through names by Last Name First, First Name, Age, City, Zip Code or Membership #.

Members
Unit: 01 **Pauline Davis - 16** Status: Active Type: Summer Only [Search Form] Last Viewed

Groups	Guidance/Accidents/Mentoring	Member Stars	Charges / Payments	Misc.	Academics	Medications	Notes/Msgs	
Member Info	Contacts	Medical	General	Household	Custom	Photo	Outcome Measurements/Surveys	Calendars / Activities

In the Quick Find List you can start typing and the system will take you to that section in the list. The Last Viewed button in the top right corner will list the last 10 members that you last looked at, click on a name and you will be taken back to that member.

Members
Unit: 01 **Ernie Archer - 5** Status: Active Type: Summer Only Quick Find: Last Name, First Last Viewed

Groups: Guidance/Accidents/Mentoring, Member Stars, Charges / Payments, Misc., Academics
Member Info: Contacts, Medical, General, Household, Custom, Photo, Outcome Measurements

First Name: Ernie **Middle:** **Last:** Archer
Gender: M Ethnicity: Caucasian DOB: 02/28/2005 Age: 13.35

Residing at the: Archer Household
Address: 2154 Breton View Lane
City: Clearwater State: FL Zip: 33767
County: PINELLAS

Membership #: Status: Active
This Member does NOT
Expected H.S. Graduation Date: 06/11/2018
Type: Summer Only
Show Current (or most recent if not available)
View/Update

Teacher: School: Green Holly Elementary
Age Group: Intermediates Grade Level: 5
Fee Level: RED Marital Status:

Processed By: ND
Last Member ID Card Issued:

Aaron, Brandy	F	10	01
Aaron, Greg	M	8	01
Aaron, Theresa	F	15	01
Adams, Barbara	F	9	01
Akron, Karen	F	7	01
Alexander, John	M	9	02
Anderson, Eric	M	9	01
Archer, Ernie	M	13	01
Archer, Stephen	M	15	01
Avila, Marcos	M	15	01
Bigham, Jacob	M	7	01
Bradley, Jessica	F	9	01
Brown, Donna	F	10	01
Brown, Jada	F	10	01
Brown, John	M	11	01
Close, Davie	F	12	01
Close, Giddeon	M	9	01
Darko, Donny	M	12	01
Davis, Luis	M	8	01
Davis, Pauline	F	15	01
Dixon, Daryl	M	12	01
Dixon, Meryl	M	14	01
Domer, Eric	M	9	01
Dover, Eric	TM	8	01
Edwards, Christopher	M	10	01
Edwardson, Chad	M	11	01
Flores, Agustino	M	13	01
Ford, Monica	F	12	01
Foustus, David	M	9	01
Gomez, Lupe	F	7	02
Greer, Helen	F	5	01

New Member Delete Member Change Member Name Move Member Member History Hardcopy Member ID Card ? Info Search Main Menu

Here you can add a new member, delete a member, change a name, move a member to another unit. Click Member History to see all the changes that have been made to this member record. Click Hardcopy to print the data about this member. Click the blue ? to learn more information about each screen. Return to Search will take you back to the search screen.

Member Search screen

The screenshot shows the 'Member Search' interface. At the top, there are controls for 'Unit' (set to {All}), 'Active Only' (checked), and 'Open USE'/'Close USE' buttons. A checkbox for 'Immediately jump to member if only 1 found after search' is also present. Below these are tabs for 'Members' and 'Contacts'. A 'Search For:' field is followed by a 'Refresh' button and a dropdown menu with options: Name, Address, Phone, and Member #. A table of member records follows, with columns: Member Name, Unit, Gndr, Age, Memb#, Status, Member Address, City, State, Zip, Exp Dt, and Primary Phor. The table lists 24 members, including Adams, Barbara; Akron, Karen; Alexander, John; Anderson, Eric; Archer, Ernie; Archer, Stephen; Avila, Marcos; Bighorn, Jacob; Bradley, Jessica; Brown, Donna; Brown, Jada; Brown, John; Close, Davie; Close, Gideon; Darko, Donny; Davis, Luis; and Davis, Pauline. At the bottom, there are buttons for 'Export to Excel', 'New Member', and 'Close', along with a 'Member ID Card' button.

- This screen can be moved by click and drag on the top bar where you see ‘Member Search’.
- This screen can be sized by hovering over any of the borders, then click and drag to any size.
- Click any of the dividing lines between column headers and drag to adjust the column width.
- The Unit dropdown **Unit: {All}** in the top left will reflect {All} which will be all units that your user has permission to view.
- The Active Only **Active Only** displays members based on the choices made in Organization Information, on the Member Status tab for the ‘Active’ – Members column.
- The Open USE **Open USE** is used to filter the members that you would like to view.
- The Close USE **Close USE** removes the filter and brings back all members in the Unit.
- Immediately jump to member – this will take you directly to a members record if only one is found in the Search For box
- Click **Members** to search within the members.
 - Choose **Name Address Phone Member #** Name or Address or Phone or Member # to search in Members by that field.
 - In the **Search For:**
 - Type any part of the Member’s First, Middle, Last and Nickname fields or the Household Name.
 - If Address is selected then type in any part of the address or city.
 - If Phone is selected then type in any part of the phone number or email address.
 - If Member # is selected then type in the member number.
 - And press enter.
 - You can also scan an ID Card to bring up a single member.
 - Click the **Clear** button to bring back all members.
- Click **Contacts** to search within the contacts.
 - Choose **Name Address Phone Member #** Name or Address or Phone or Member # to search in Contacts by that field.
 - In the **Search For:**
 - Type any part of the Contact’s First, Middle, Last and Nickname fields or the Household Name.
 - If Address is selected then type in any part of the address or city.

- If Phone is selected then type in any part of the phone number or email address.
 - If Member # is selected then type in the members number.
 - And press enter.
 - You can also scan an ID Card to bring up a single member.
 - Click the **Clear** button to bring back all contacts.
- Choose your sorting option in the top right of the screen
- Click the **Last Viewed** to quickly jump back to any of the last 10 members that you looked at.
- Right click on any of the headers below or click any of the **▼** to sort the columns.



- Click the **Clear Sort** to remove the last sorting choice.
- Click the **Configure** to choose the columns that you wish to see on the search screen. The left is for Members and the right is for Contacts.

Column	Show
Member Name	<input checked="" type="checkbox"/>
Unit	<input checked="" type="checkbox"/>
Gender	<input checked="" type="checkbox"/>
Age	<input checked="" type="checkbox"/>
Memb#	<input checked="" type="checkbox"/>
Status	<input checked="" type="checkbox"/>
Member Address	<input checked="" type="checkbox"/>
City	<input checked="" type="checkbox"/>
State	<input type="checkbox"/>
Zip	<input checked="" type="checkbox"/>
Primary Phone	<input checked="" type="checkbox"/>
Phone Type	<input checked="" type="checkbox"/>
Household Name	<input checked="" type="checkbox"/>
Exp Dt	<input checked="" type="checkbox"/>

Changes will take effect upon CLOSE.

Note: If you check to SHOW a field, but that field does not show on Members/Contacts form, the system will uncheck that field after you CLOSE.

Column	Show
Member Name	<input checked="" type="checkbox"/>
Unit	<input checked="" type="checkbox"/>
Gender	<input checked="" type="checkbox"/>
Age	<input checked="" type="checkbox"/>
Memb#	<input checked="" type="checkbox"/>
Status	<input checked="" type="checkbox"/>
Contact Name	<input checked="" type="checkbox"/>
Relationship	<input checked="" type="checkbox"/>
Contact Address	<input checked="" type="checkbox"/>
City	<input checked="" type="checkbox"/>
State	<input checked="" type="checkbox"/>
Zip	<input checked="" type="checkbox"/>
Primary Phone	<input checked="" type="checkbox"/>
Phone Type	<input checked="" type="checkbox"/>
Household Name	<input checked="" type="checkbox"/>

Changes will take effect upon CLOSE.

Note: If you check to SHOW a field, but that field does not show on Members/Contacts form, the system will uncheck that field after you CLOSE.

- Double click on any Member or Contact to go to their record.
- At the bottom of the form “When opening the Members form from Main Menu... you can choose either
 - Show this form to Search for Members which provides the most flexible searching or
 - Open to the ‘Quick Find’ field on the Members form which takes you directly to the standard members screen.

When opening the Members form from Main Menu...

Show this form to Search for Members

Open to the 'Quick Find' field on the Members form

- These are a few search examples:

Try these • Smith
 Search • John
 Examples: • Smi, Jo (or) Jo/Smi
 • 42 (or) 42/

- The blue ? contains additional help
- The Search results can be exported to Excel
- Click New Member to add a new member to the database from the Search screen
- Click Close to go back to the Main Menu
- Click Member ID Card to modify, preview or print ID cards