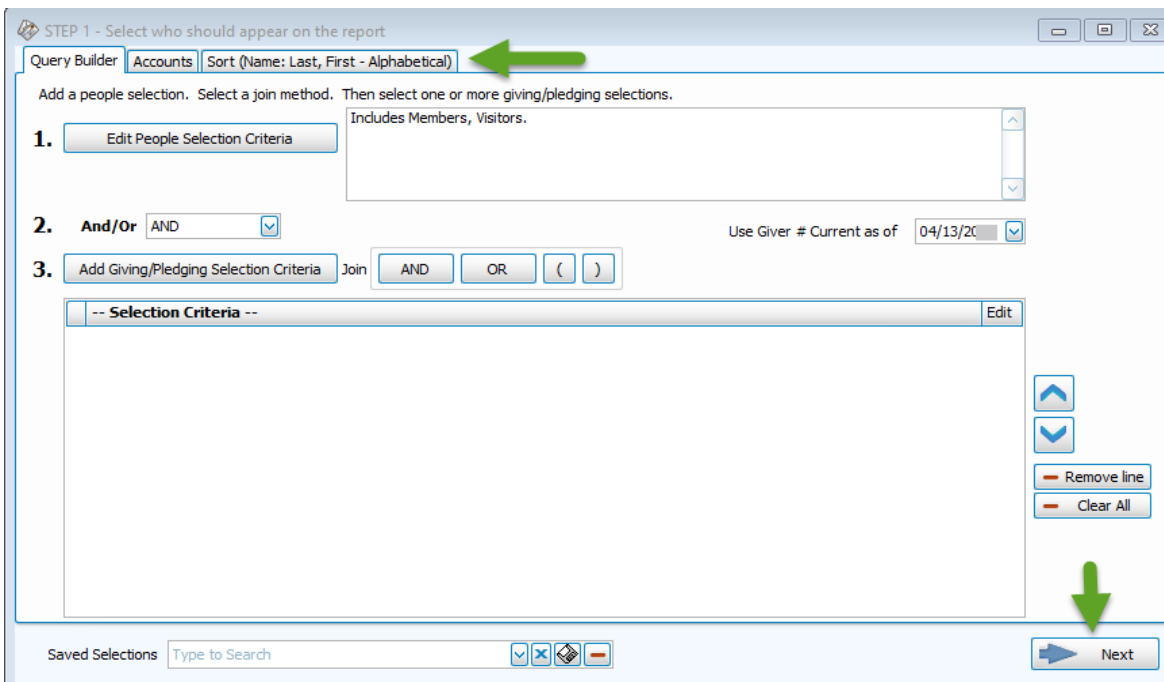


In Membership go to Reports

### STEP 1 - Select WHO should appear on the report

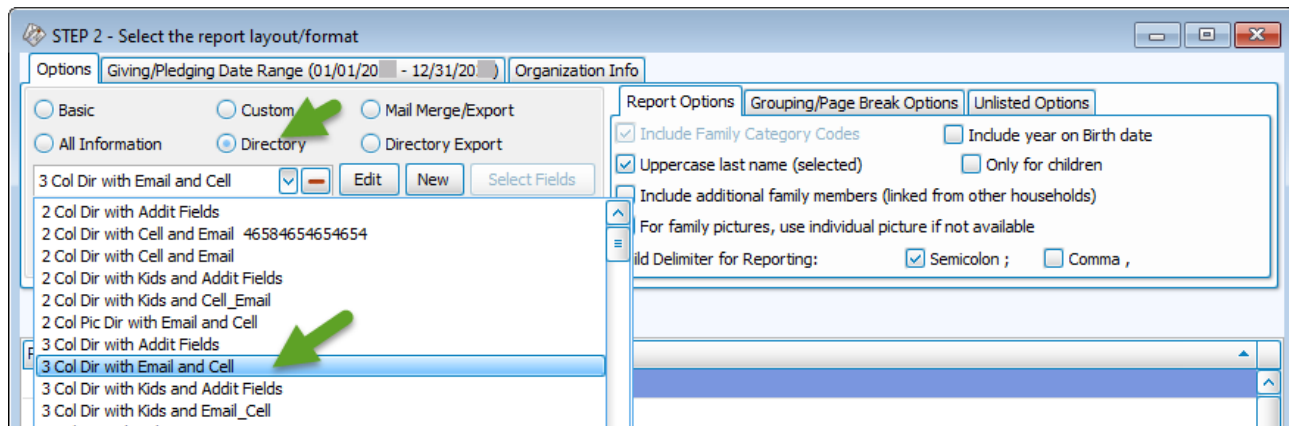
Use the Query Builder to Edit People Selection Criteria and Add Giving/Pledging Selection Criteria if you would like additional criteria added to the Directory. Otherwise, by selecting *Directory* (on Step 2), the program will only show those Individuals that have the *Include on Directory* box checked and *Directory/Report Order* filled in.

- Use the *Sort* tab to choose the order your directory will appear. Choosing *Name: Last, First - Alphabetical* provides an alphabetical sort. Click *Next*.

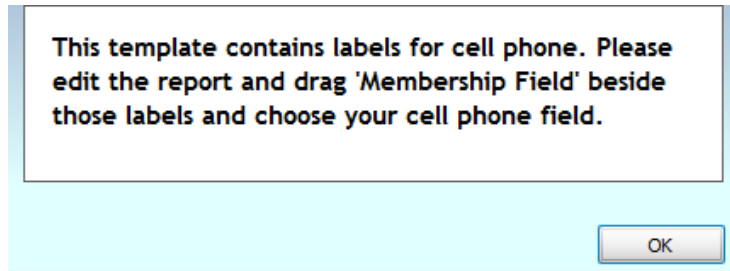


### STEP 2 - Select the report layout/format

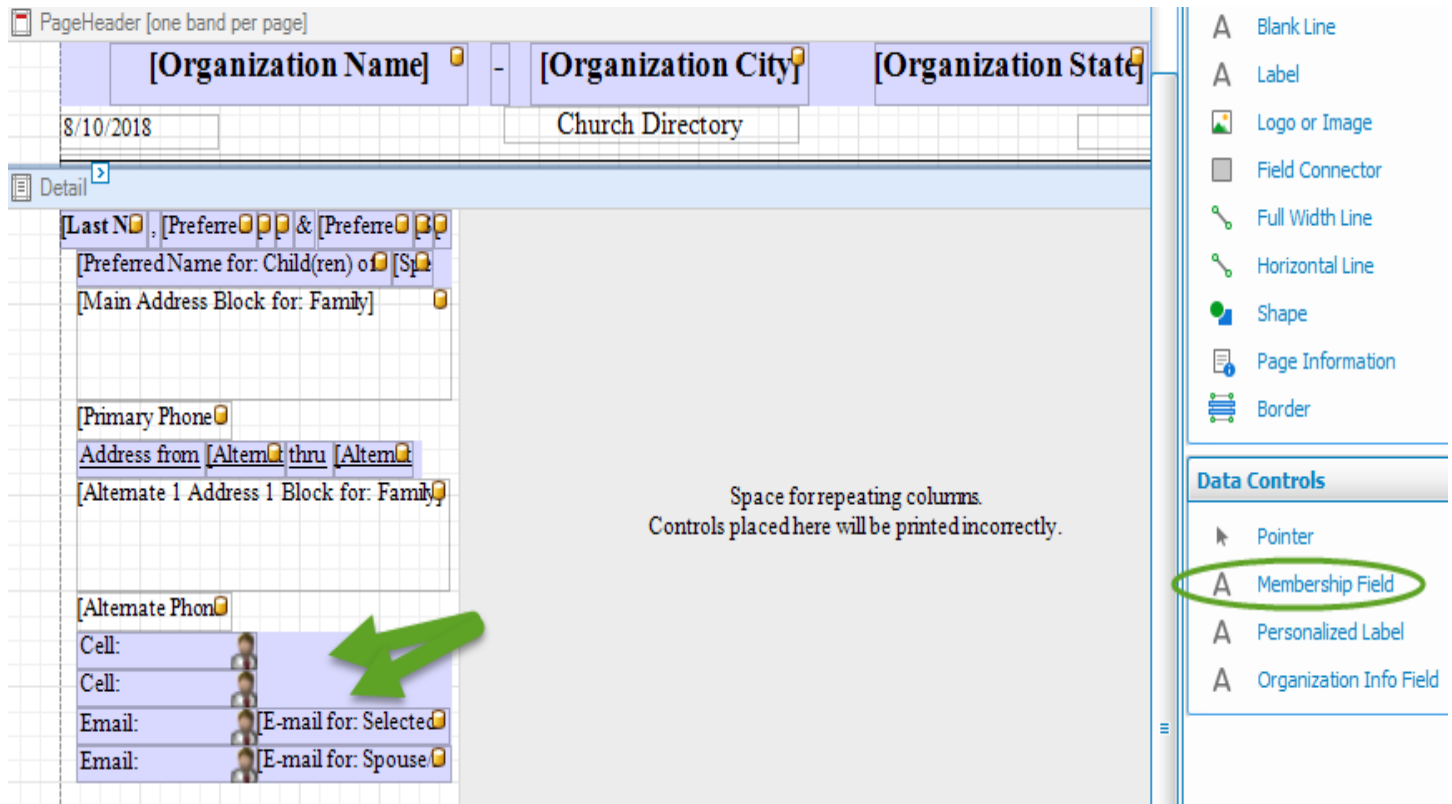
- At the *Options* tab choose *Directory*. Under *Directory*, click on the drop box, which shows multiple layout options. We recommend selecting one of the layouts that is closest to the directory you want and edit it to get all of the desired fields.



- The example shows [Template] 3 Column Directory with Cell and Email which includes adult and children’s names, address, home phone, alternate address information and email as well as the option to add the cell phone.
- This message appears which lets you know additional Membership fields need to be chosen. In this case, it’s the cell phone. Click OK.



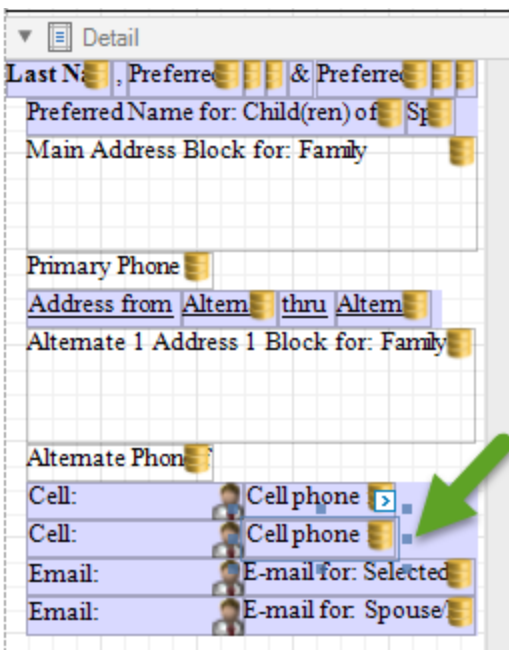
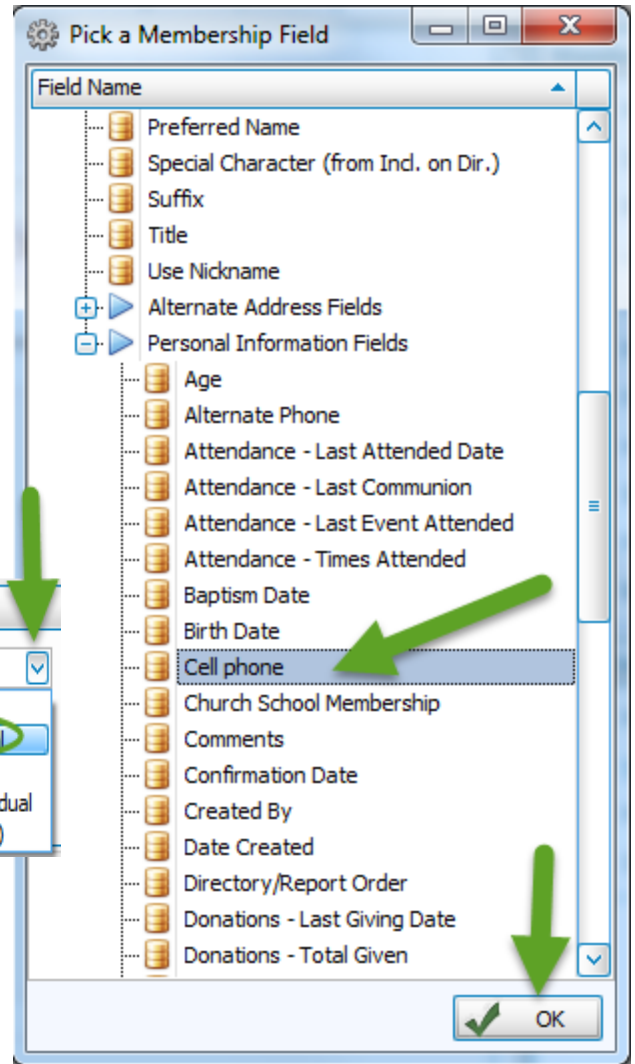
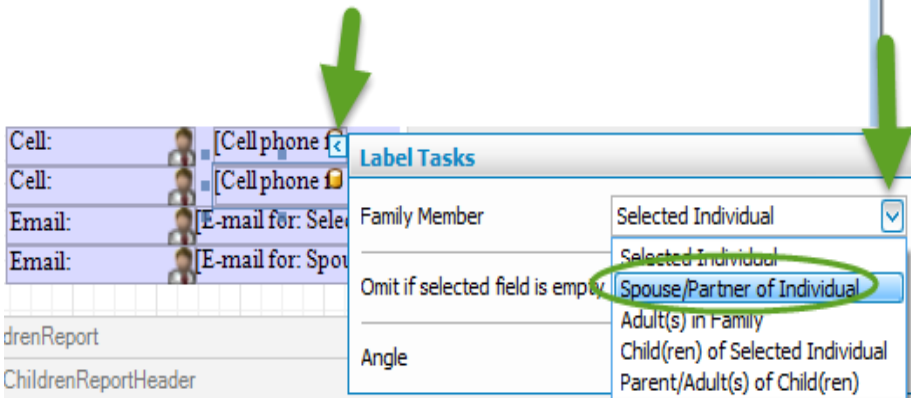
After the directory layout is selected, click the *Edit* button. The *Report Designer* opens. The green arrows indicate where the *Cell Phone* fields need to be added.



To add the *Membership Field* of *Cell Phone*.

- Under *Data Controls* on the right side of the screen, click on *Membership Field* and drag to the empty space beside cell phone.
- *Pick a Membership Field* box appears.
- Scroll down to *Cell Phone*, highlight and click *OK*.

- When a *Membership Field* is added to the layout, it defaults to the *Selected Individual* which is the person with the *Directory Report Order of 1 - Primary*.
- Repeat to add the *Cell Phone* for *Spouse/Partner*.
- Click on the *Membership field* of *Cell Phone* for *Spouse/Partner*, a small white arrow appears, click on the arrow. *Label Tasks* will open, change *Family Member* to *Spouse/Partner of Individual*

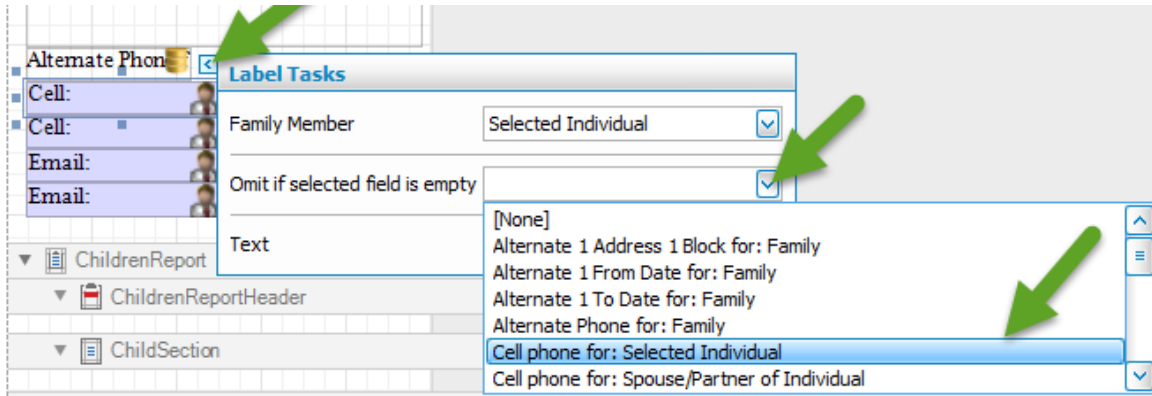


Expand the cell phone fields to show the Cell Phone for: Selected Individual and Cell phone for: Spouse/Partner.

To expand the field, click on it and drag the blue square to the right.

NOTE: If any pink appears on the screen, there is an overlap of fields, which will cause an issue on your directory.

- To link the Cell label to the Cell phone field, click on the first Cell label and an arrow appears, then click on the arrow to open Label Tasks.



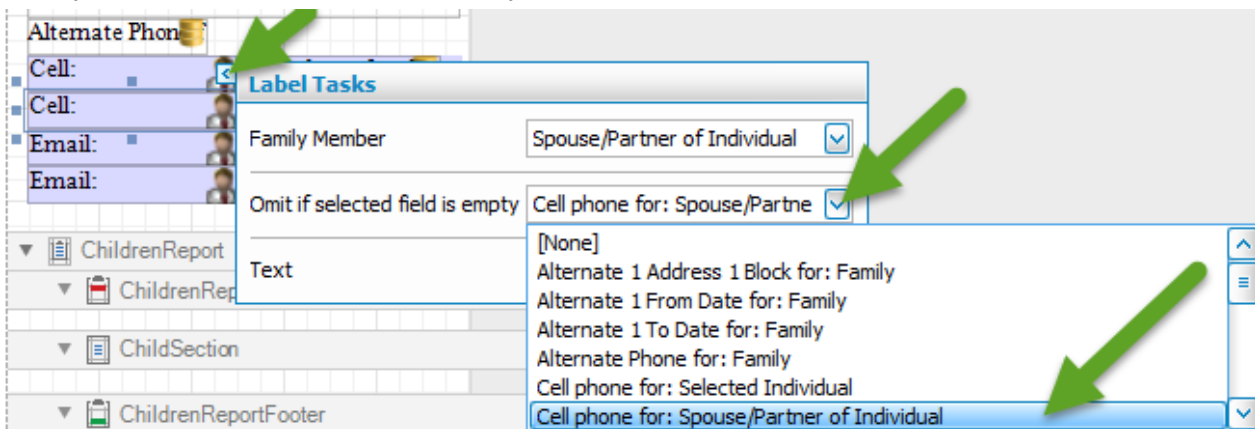
- Family

Member should be *Selected Individual*

- Omit if selected field is empty* field, choose *Cell Phone for: Selected Individual*. This setting tells the layout that if there is no cell phone, it will omit the name and the label for Cell Phone from the Directory.
- Text* displays the label of Cell: on the directory.

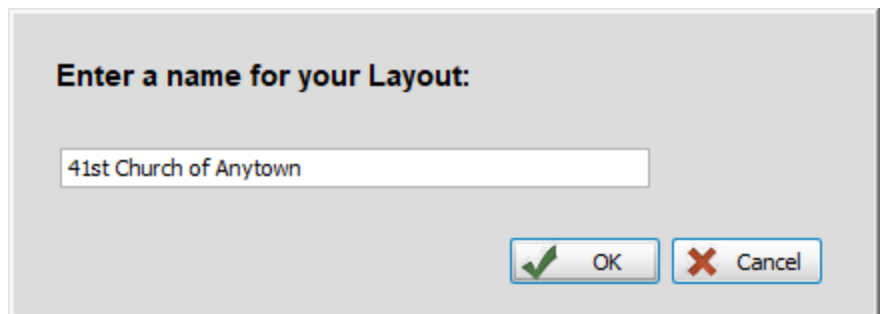
Next...

- Select the second Cell Label and click the white arrow to open the Label Tasks window.
- Family Member* should be *Spouse/Partner of Individual*
- Omit if selected field is empty* field, choose *Cell Phone for: Spouse/Partner of Individual*.
- Text* displays the label of Cell on the directory.

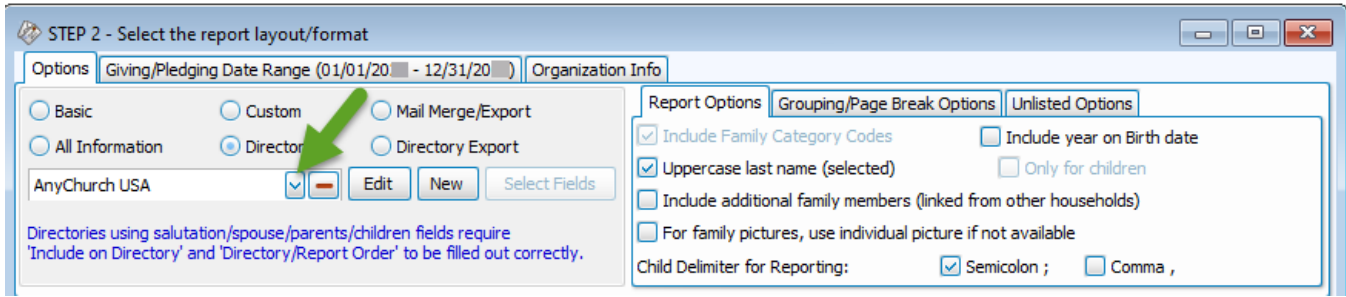


Once you have your layout setup, go up to the top left and click the *Save As* button.

- Enter a name for the new layout and click *OK*
- Exit out of Report Designer by clicking on the *X* at the top right of the screen.



The saved Directory layout will now be listed in the drop box for use in the future when Directory is selected.



Click *Print* at the bottom right of the Step 2 screen and a *Preview* of your Directory will appear.

