

Directions for Using the Potential Member Report

- On the [Membership](#) page under **NC State Chapter Resources**, select the **Potential Member Report** for the Region in which you preside.

Potential Member Report

Contains Unaffiliate (Unaff), Introduction of a Woman (IOAW), and Self-Referral (SR) reports and scripts.

Files will download in Excel format to your computer

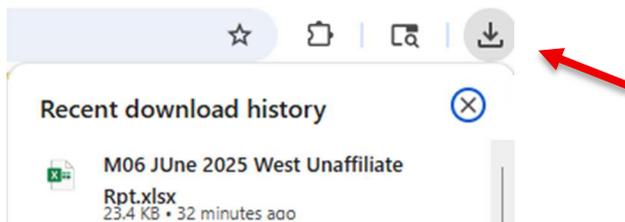
- East Region
- East Central Region
- West Region
- West Central Region

- Not sure of your region? Click on the [Regional Map](#) at the bottom of the page.

NC Chapter Information

- NC Chapter List
- NC Chapter Family Tree
- Regional Map 

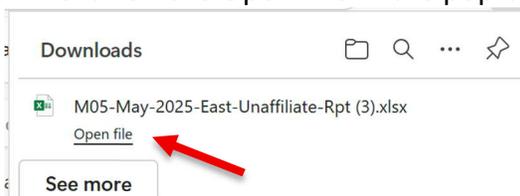
- If you are using Chrome as your browser , it will automatically download to your computer. Go to the down arrow on the top right of your web browser to open the report.



- If you are using Edge as your browser , the report will open in a new tab. Click **Download file** at the top of your browser to view the file in Excel.

[Download file](#)

- Click on the Open File in the pop-up window.



- You will notice there are tabs at the bottom of the file (see below) for the different types of Potential Members and scripts corresponding to each type. Click on the tab for the report or script you would like to review. Currently the Unaffiliate tab is selected, which is designated by the different color and the underline:



- The default sort is by Primary Area. If you would like to sort by another field, follow the instructions below:

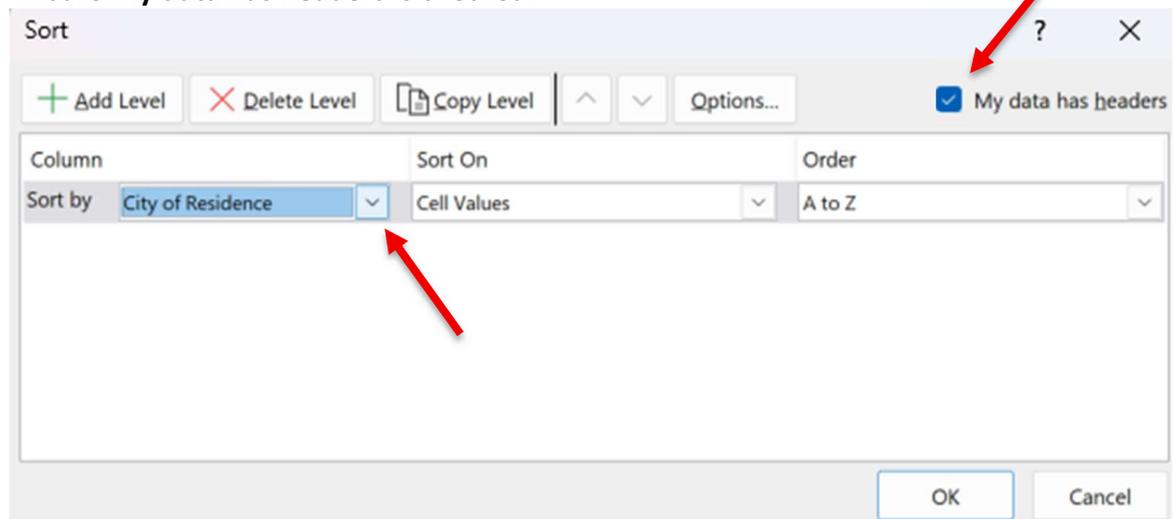
- Click on “Enable Editing” at the top of the page.



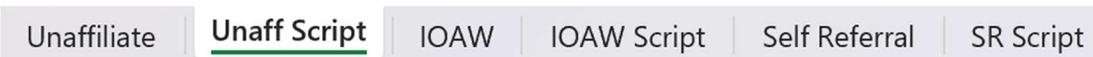
- Find and click the “Sort” icon on the top toolbar:



- In the pop-up window (see below), select the column you would like to sort by. Make sure **My data has headers** is checked:



- Click OK when you have selected your Sort by and Order.
- Reach out to the women near you. Not sure what to say? Look at the script tab for some helpful ideas.



- Want to save your changes? Click on “File”, click on “Save as”. Choose where you want to save and name the file.
- Report any updates or changes about a Potential Member, by clicking on the [Submit Potential Member Report Updates](#) link on the **Membership** page below where you downloaded the report.

