



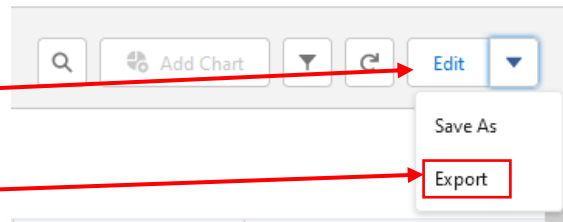
How to Identify New and Newly-Arrived Members of Your Chapter

The chapter rosters available through your chapter portal do not give you the ability to identify who's recently moved into your chapter's area. The "All New Member Joins" roster, which is available via your chapter portal, will identify any members who have recently joined AFA. This guide will show you how you can identify both the newly-joined and newly-arrived members. Since the process for identifying the new arrivals is more complicated, we'll look at it first.

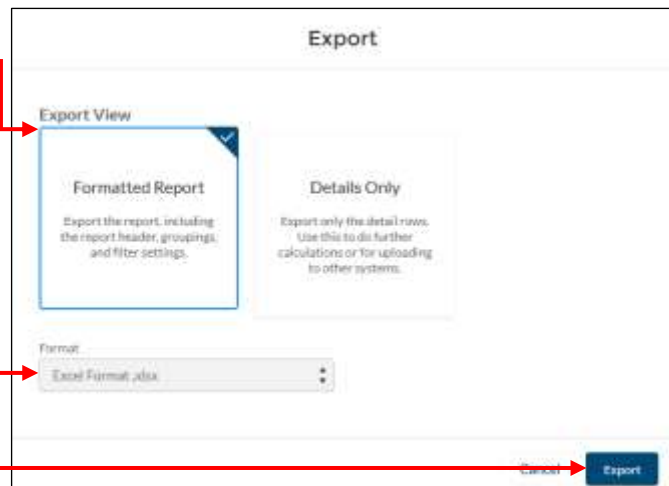
Newly-Arrived Members

You'll need to download two chapter rosters with some time period between the downloads. A month is best. It is *not* possible to download a roster back-dated to a previous date.

To download a roster from your chapter portal, click the down-arrow next to "Edit" in the Chapter Roster Report title bar, then click "Export" in the dropdown menu.



Make sure "Formatted Report" and "Excel Format .xlsx" are selected in the Export pop-up window, then click the blue "Export" button.



Save the file to a location on your computer.

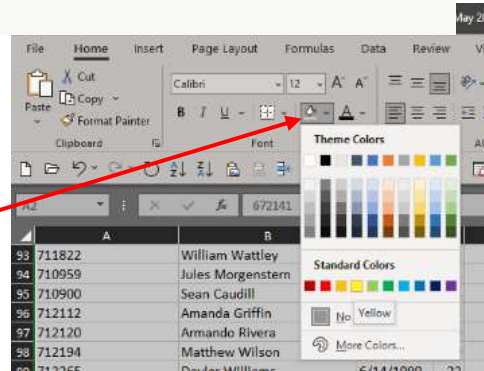
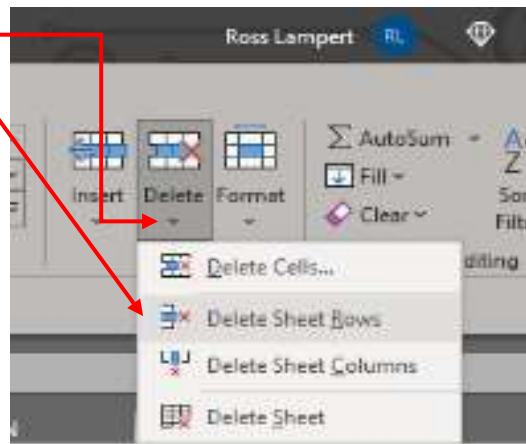
Repeat this process later in order to have the two rosters separated in time. This will allow you to identify the members who have arrived since you downloaded the first roster.

Open the *newer* roster.

- If the download produces a lot of heading data, as shown below, delete all of those rows by clicking on the row 1 box, then Shift + click on the last row above the actual data (in this case, row 12).

	A	B	C	D	E	F	G	H
1								
2	Current New Member Joins							
3	As of 2022-05-03 17:32:15 Eastern Standard Time/EST • Generated by AF107 Cochise Chapter • Sorted by Join Date (Ascending)							
4								
5								
6	Filtered By							
7	Show: All members / prospects							
8	Membership Number not equal to							
9	Join Date greater or equal 3/1/2022							
10	Deceased equals False							
11	Current Membership Expire Date not equal to							
12								

- Click on the **down-arrow below Delete** on the Home ribbon, then on **“Delete Sheet Rows.”**
- Do the same for any unneeded rows below the data, and delete column A, which will be empty.
- Click in the upper left-most cell with data in it (now usually cell A2).
- Select all data fields by pressing Ctrl + Shift + End (all three keys simultaneously) on your keyboard. (Mac users: substitute Cmd for Ctrl for all steps.) All of the data will now be highlighted in gray.
- Highlight all of the selected cells by clicking the down-arrow on the **Fill Color selection tool** on the Home command ribbon and selecting a color.
- Select all of this data to be copied by pressing Ctrl + C on your keyboard.



Now open the *older* roster.

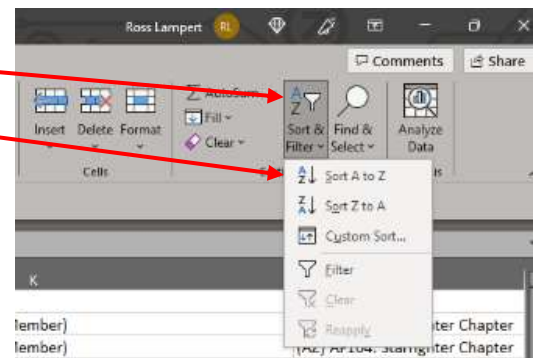
- Click in the top left-most cell (A1).

- Jump to the bottom of the data by pressing Ctrl + ↓ on your keyboard. (If you're using a laptop, you may need to press Ctrl + Fn + ↓ instead.) Then press the down-arrow key one more time. This will put you on the first empty row in the spreadsheet.
- Paste all of the data from the newer roster in by pressing Ctrl + V.

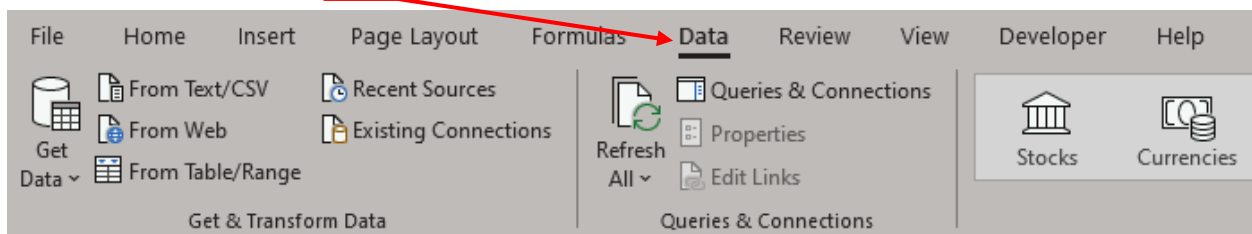
Return to the top of the spreadsheet by pressing Ctrl + Home (Ctrl + Fn + Home on a laptop).

At this point, you have a lot of duplicated data in the spreadsheet, but the duplicates are spread out. The next step is to pair them up so you can identify the newly-arrived members.

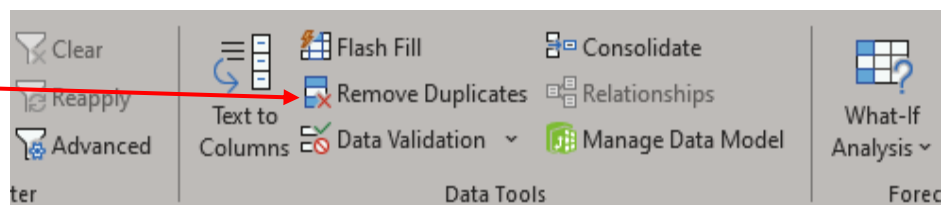
To do this, click on the "Sort & Filter" tool at the right end of the Home ribbon and then click on "Sort A to Z." This will sort the data by the data in the first column, which should be the Membership Number. The result will be a lot of rows each in the default fill color (white) followed by another row with identical information but filled in with the color you selected for the new data. Any row that doesn't have an uncolored twin identifies a newly arrived member.



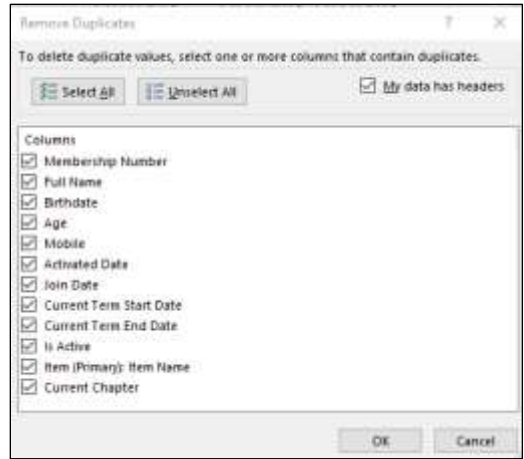
Great! But that can be a lot of rows to sort through. You can use another Excel tool to do that for you. Start by clicking on Data on the top menu line.



Toward the right side of the Data ribbon is a "Remove Duplicates" function.



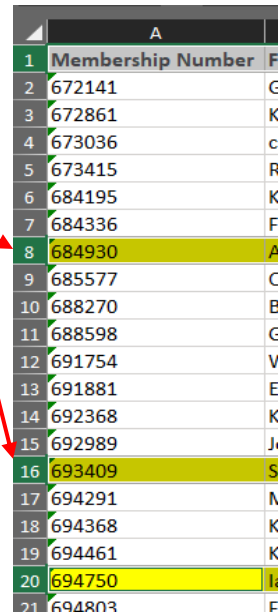
Click on it and this pop-up window will appear. Leave all of the check boxes checked and click OK. The only highlighted rows that are left are your newly-arrived members.



To make it easy to manage their data—for example, to use it as the base for a letter or e-mail welcoming them to the chapter—you’ll want to copy them out to a new spreadsheet (or at least a new page in the existing spreadsheet).

Open a new spreadsheet however you wish (Ctrl + N is a quick and easy way).

Go back to the previous workbook, and select just the header row and the rows with the highlighted data. An easy way to do this is to click in the row number box for row 1 (the header row), then use Ctrl + click in the row number box for each highlighted row. That will look something like this. Notice how the row number boxes for the selected rows are now green instead of gray.

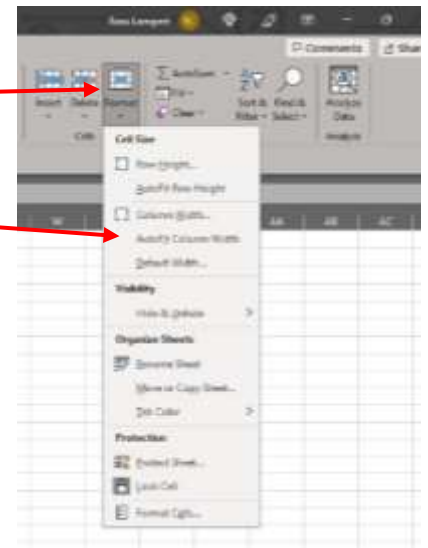


Use Ctrl + C to select all of them to be copied. That will result in a running dashed-line box around each row.

Jump over to your new, blank spreadsheet, click in cell A1 if it’s not selected already, and press Ctrl + V to paste the data in.

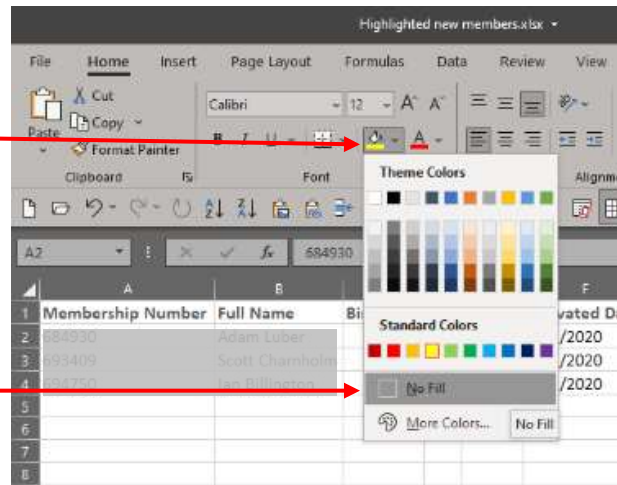
To fix the problem that the columns aren’t the right width, click on the box with the downward pointing triangle at the top of the row numbers. That will select all rows and columns in the spreadsheet. (Or, you can click in cell A1, then Shift + click in the bottom right-most cell to select just the rows and columns with data.)

Over on the right side of the Home ribbon, not far from the “Sort & Filter” tool you used before, you’ll see “Format.” Click on it and then on “AutoFit Column Width” in the drop-down menu. Each column will widen out to display the widest text in it.



Your last step is to get rid of the highlighting color in the cells. The process is almost the same as the one you used to highlight all cells originally.

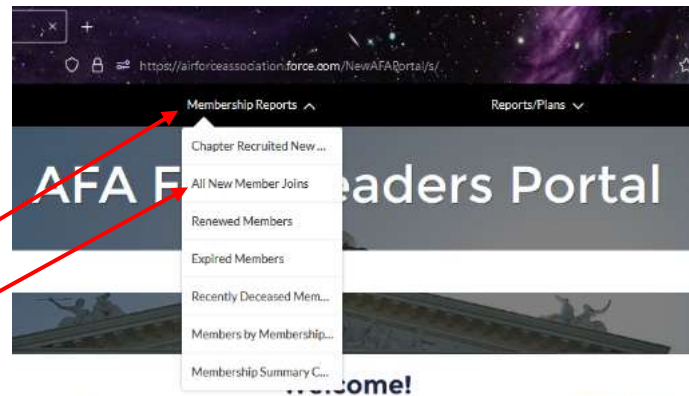
- Start by clicking in the first data cell, which should be A2.
- Select all data fields by pressing Ctrl + Shift + End (all three keys simultaneously) on your keyboard. All of the data will now be highlighted in gray.
- Highlight all of the selected cells by clicking the down-arrow on the **Fill Color selection tool** on the Home command ribbon, but this time click the **“No Fill” option.** (I’ve blurred the name and member number data here.)



You now have a roster of all your members who have recently moved into your chapter’s area.

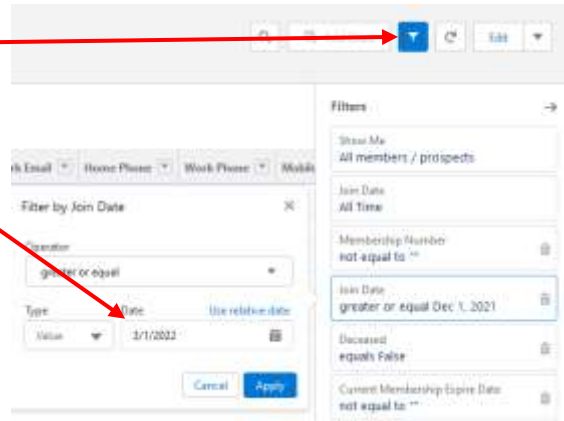
New Members

To identify chapter members who have recently joined AFA, start by logging in to your chapter portal. Click on the down-arrow next to **“Membership Reports”** and select **“All New Member Joins.”**



the AFA Field Portal. To help you navigate our new system, please refer to our [Field Portal User Activity and Financial Reports due July 31, 2021.](#)

You can use the **filter function** to narrow the join dates you want to consider down to the period covered by the two other rosters (I've used **March 1, 2022** here).



Export and clean up the roster the same way you did the total membership rosters before. The result should look something like this (I've blurred out the member numbers and names).

	A	B	C	D	E	F	G	H
1	Membership Number	Full Name	Join Date	Current Membership	Expire Date	Personal Email	Work Email	Home P
2			4/1/2022	3/31/2025				
3			4/1/2022	3/31/2025				
4			4/1/2022	3/31/2025				
5			4/4/2022	4/30/2025				
6								

Now you can select all of the data fields the way you did before, copy them into the spreadsheet you've already created for the newly-arrived members, and you have the complete list of new and newly-arrived chapter members.

Save the file and you're ready to use the data however you wish to reach out to those new members to welcome them to the chapter and start getting them involved.

This whole process should take just a few minutes. If you have an Excel wizard in your chapter, he or she may be able to create a little program within Excel called a macro that will take it from minutes down to seconds. In [the video](#) on how to do what I've described here, I demonstrate such a macro in action.

Finally, the Field Council Training Subcommittee would appreciate it if you'd take a minute to click or tap on the big red Survey button at the right or on [this link](#) to take our survey. We always appreciate your feedback on our videos and guides; they help is make our training better for you. Thanks!

