

How to setup up your own actual membership database using the trial.

We recommend printing this document to make it easier to follow the steps below (3 pages).

Before we start please note these points...

The trial is the full complete program, should you later decide to purchase we provide you with a Licence Key code to unlock the program for use up to your nominated member capacity, no further software is required.

Display

When you first run the program resize the main window then as you progress position and resize all other windows to suit your monitors resolution and display settings (some windows can not be resized).

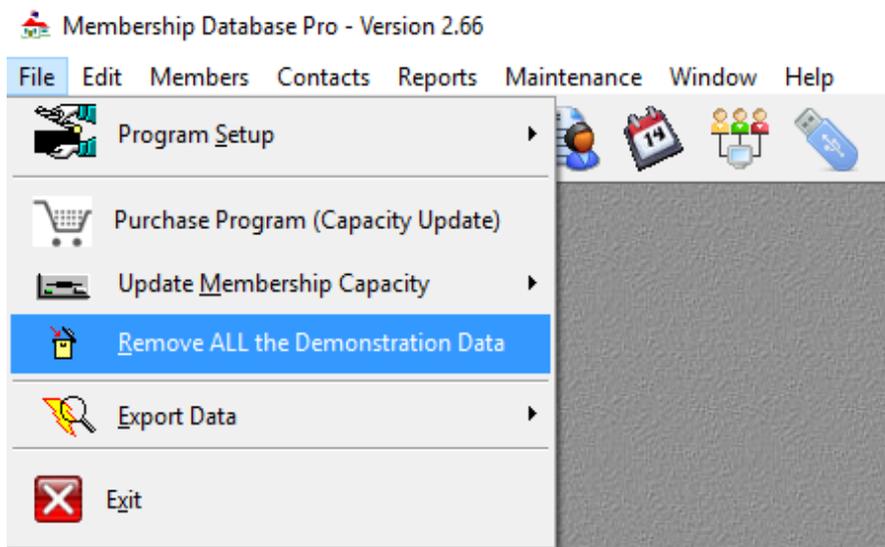
Optionally change/add a main frame background. Menu options: **File > Program Setup > Display Preference**

Disabled Menu Options (both Tool bar and drop down menu's)

Some menu options will not be available for selection if a window is open (built in protection). To enable access to disabled/invisible menu options [**Close**] any windows that are open.

When you are ready to build your own live data base the fictitious demonstration data will need to be removed.

To delete the demonstration data select the menu options: **File > Remove ALL of the demonstration Data**



Member Types and Categories (Categories are optional)

Add or edit these from the menu option: **Maintenance > Member/Category Types**

You can have as many different *Member Types* as required but *Categories* are limited to 12. A member can only be assigned to a single *Member Type* but to any combination, or all of the 12 *Categories*. Only categories that have been created by you will be available for selection from the Add/Update Members window. A Member Type can have a zero subscription fee.

TIP on Member Types They provide functionality and flexibility particularly for reports as members can be filtered by a single type or any combination of. The default is all, select from the *Select & Sort* window.

TIP on Categories If you need to link members to one or more months of the year then categories could be used for this purpose as there are 12 of them. (ie. description for Category 1. 'January', Category 2. 'February' etc.)

TIP on Member Numbers A member number can be any number between 0001 and 9999 therefore they could be used as yet another form of grouping members. (example males 0001 to 2000, females 3000 to 4000. For convenience the program will select the next free number by default when adding a new member, override with the members existing number or any other number you want to use leaving gaps for new members later. The program will automatically disallow duplicate numbers. Letters and invoices can be printed for a selected *Member Number* range only from the *Select & Sort* window.

Please follow the steps below to initially setup the program for your own use.

IMPORTANT: Firstly the demonstration data must have been removed (see page one).

1. Enter the details about your club or organization. (required)

To do this select the menu options: **Maintenance > Club Details**

If you intend to print GST tax invoices your GST/ABN number will be required (NZ and Australia only).

Please note that your organizations name can not be entered using the trial licence.

2. Build the 'Member Types' file. (required)

To do this select the menu options: **Maintenance > Member/Category Types > Member Types**

At least one 'Member Type' must be defined. The grouping of members into different *Member Types* is a powerful tool. If you do not have various *Member Types* we would suggest grouping your members into them as they provide functionality and flexibility particularly for reports. A members default subscription fee is also applied here for automatic receipt call up later. Default subscriptions can be overridden on an individual basis from the Add/Edit members window, for example for a reduced part year subscription fee.

3. Build the 'Member Category Types' file. (optional)

To do this select the menu options: **Maintenance > Member/Category Types > Category Types**

Members can be assigned to any combination of, or all of the predefined categories. For example a *Category Type* of 'Committee' can have any member assigned to it regardless of their *Member Type*. From the Browse Members window you can select to view only members assigned to a particular *Category Type*.

4. Build the 'Sundry Revenue Items' file. (optional)

To do this select the menu options: **Maintenance > Sundry Revenue Items**

These are for non-subscription receipts. For example donations, club attire, club trips or sports fees etc. A revenue item can relate to a single item or represent a group of items of varying price depending on the amount of sundry revenue breakdown a club requires. The items defined here are later selected when processing a *Sundry Revenue* receipt transaction.

5. Setup the Programs defaults.

To do this select the menu options: **File > Program Setup > Program Defaults ...and** select the following tabs:

Close Off/GST tab: Optionally enter a *Close Off* date for your next rollover date. If in New Zealand or Australia and registered for GST select the relevant GST option otherwise select *No GST*. Selecting GST will not effect a total as a total must be entered as GST inclusive, it just allows the program to calculate the GST content.

Data Entry tab: The defaults entered here will be automatically inserted when adding a new member. This eliminates repetitive keying.

User tab: Optionally select to have the program always opening at the *Browse Members* window when first run. The tick box 'Use ENTER key as TAB key' is optional but not recommended.

Extra Fields tab: Optionally display a *Members Date of Birth* on the *Browse Members* window. Optionally include an extra entry field to store a members title i.e. Mr., Mrs. etc. this is particularly useful for mailing labels. For sporting clubs three extra fields are optionally available for storing a members handicap score details.

Report Specifications tab: When the program first starts the defaults set here will be loaded and the 'Select & Sort' order will default to these settings. The *Status* set here for reports also applies to the initial sort order (*Active, Inactive or Both*) for *Browse Members*. Note that if no *Member Types* are highlighted the program will assume you wish to include them all. You can also select to always print a receipt when a receipt transaction is processed. There is also an option to turn the *Print Preview* off but its not recommended.

Password tab: Password protection is optional. You can add password protection and have varying security levels for each authorized user.

Path tab: No user action required, its used to display where the program has been installed on your computer.

6. Build the 'Members' database.

From the '**Browse Members**' window use the [**Insert**] button, '**Insert**' key or the '**right mouse button**' to open the **Add/Edit** update members window. The *Name*, *Member Type* and *Member Number* are compulsory fields.

To add a members title (ie. Mr, Mrs etc.) enable this entry field from the tick box on the [**Extra Fields**] tab found under **File > Program Setup > Program Defaults**

The **Alt. (Alternative) Address Name** field is used to optionally address letters and/or labels for two or more members at the same address (ie. Husband & Wife). If left blank its ignored. For example if 'Mr & Mrs Bloggs' is entered here then that will be used as the header for the members address.

The '**Member Number**' will default to the next highest *free Member Number* but note that a *Member Number* can be any number from 1 to 9999 so override the default as required, in fact its recommended to leave gaps for later entries, for example 0001, 10003, 1005 rather than 0001, 0002, 0003 etc. **TIP:** The program has a 'Member Number Register' utility program found under *Maintenance* to list free member numbers for a given range.

Subscription fee Override Ignored if blank. Enter a \$ amount to override the default subscription fee set for the *Member Type* under *Maintenance*. An example of use would be for a reduced part year subscription.

Phone/Mobile/Fax details etc. Only available for inserting after a member has already been added. Select the [**Change**] button from *Browse Members* to enter this information.

e-mail: Enter the members email address, this is displayed on the *Browse Members* window for the selected member, click on this email address to email the member. **TIP** Use the [< **Verify**] button to validate.

Status: (Active or Inactive) In most cases this can be ignored as a new member by default is assigned the status of **Inactive** and later when a subscription receipt transaction is processed for the member the member is then made **Active** automatically. To override tick the **Override** [] tick box (see below). It is intended that at the end of a financial year (or other defined subscription period) a rollover be done which resets all members to the status of **Inactive** in readiness for a new subscription period.

Status Override If setting up is being done part way though a financial year (or other subscription period) where members subscriptions have been previously paid there are two ways of making these newly added financial members **Active**. One is to process their subscription receipts, the other is to override the default member status. To override the members active status tick the **Override** [] tick box at the base of the members update window.

TIP To make all members active there is a status override option in the '*Maintenance*' menu, this would be helpful in the initial setup if most of the members were financial as it would be easier to make them all active then call up the update window to change the fewer UN-financial members to 'Inactive' using the status **Override** [] tick box.

This default method of assigning a members status automatically may not suit all clubs, for example a club may wish to assign its members as Active or Inactive for purposes other than whether a member is financial or not therefore to enable flexibility within the program a user is able to manually change a members status.

TIP It is recommended to build the membership data base in batches creating a data backup using the program Backup/Restore utility on the completion of each batch as a safeguard against loss of data from outside influences such as power failure.

Member Notes Tabs (one and two)

These are two separate notes sections available for each individual member. Any text up to 1,000 characters may be entered into each of these fields. **TIP** entries for [**Member Notes One**] are displayed on the *Browse members* window for the selected member. [**Notes Two**] can be viewed by selecting the button which is only visible if notes exist for the selected member. To print all details including notes press the [**Print**] button on *Browse Members*. *A notes report is also available from the [Reports] menu.*

Photo Tab

Optionally link to a photo image file of the member. Use the [...] browse button found to the right of the path field to choose a photo image file. We recommend these be stored in the '*Images*' folder found within the programs folder because if the path (location) to the photo file is to long it will not work.

For more detailed information on all aspects of the program please refer to the programs on screen help manual (help file). The Backup/Restore utility program has its own help file, run the utility to access.