

Membership Database Application

This application tracks member payments for dues, programs, and events; generates form letters for past due notices, end-of-year summaries; provides the capability for users to create custom form letters; and generates reports.

When the application first starts, the **Past Due** screen is displayed. This screen has tabs to show members that have outstanding amounts due for 30, 60, and 90 days. Members that have incurred charges for which the due date has not yet arrived show in the "Current" tab.

The screenshot shows the 'Past Due' window of the Membership Database application. The window title is 'Past Due' and it contains a table with the following data:

30 Days Past Due	60 Days Past Due	90 Days Past Due	Current
First Name	Last Name	Amount Due	Item
		\$225.00	Event - Cape May 2008
		\$45.00	Event - Songs of the Dream Garden
		\$50.00	Program - Newsletter Half Page
		\$198.00	Event - Cape May 2008
		\$50.00	Program - Newsletter Half Page
		\$325.00	Program - Newsletter Quarterpage
		\$325.00	Program - Newsletter Quarterpage
		\$225.00	Event - Cape May 2008
		\$325.00	Program - Newsletter Quarterpage
		\$325.00	Program - Newsletter Quarterpage
		\$50.00	Dues
		\$225.00	Event - Cape May 2008
		\$325.00	Program - Newsletter Quarterpage
		\$120.00	Dues
		\$35.00	Event - Navigating Path Freedom
		\$225.00	Event - Cape May 2008

The interface also includes a sidebar with icons for: Members, Events, Programs, Payments, Past Due, Reports, Letters, Tables, Imp / Exp, Config, and Exit. At the bottom right of the window, there are buttons for 'Go To Member' and 'Close'. The status bar at the bottom of the application shows the date '6/14/2009' and the time '9:48 PM'.

The **Members** screen is shown below. A member can be navigated to by clicking on the appropriate alphabetic tab at the top of the screen. Clicking on a member in the list causes their detail information to be displayed in the four tabs below: their general demographic information, the events they have signed up for, the programs they have signed up for, and their payment history. This screen also facilitates adding a new member and updating or deleting the currently displayed member.

Members

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | # | Search Results

8 record(s) found.

First Name	Last Name	Level	City	State	Phone #
[Faded]	[Faded]	Temple Benefactor	[Faded]	[Faded]	[Faded]
[Faded]	[Faded]	Friend	[Faded]	[Faded]	[Faded]
[Faded]	[Faded]	Friend	[Faded]	[Faded]	[Faded]
[Faded]	[Faded]	Supporter	[Faded]	[Faded]	[Faded]
[Faded]	[Faded]	[Faded]	[Faded]	[Faded]	[Faded]
[Faded]	[Faded]	[Faded]	[Faded]	[Faded]	[Faded]
[Faded]	[Faded]	[Faded]	[Faded]	[Faded]	[Faded]
[Faded]	[Faded]	[Faded]	[Faded]	[Faded]	[Faded]

General Info | Events | Programs | Payments

Title: [Dropdown] First Name: [Text] MI: [Text] Last Name: [Text] Suffix: [Dropdown]

Address Line 1: [Text] Address Line 2: [Text]

Country: [United States] Zip/Postal Code: [Text] City: [Text] State/Province: [Dropdown]

Home Phone: [Text] Work Phone: [Text] Ext: [Text] Mobile Phone: [Text] E-Mail Address: [Text]

Date of Birth: [Text] Student? How Discovered: [Friend] Member? Membership Level: [Friend] Ann Dues: \$120.00 Balance: \$50.00 [Update/View Membership Data](#)

6/14/2009 9:57 PM

The **Events** screen is shown below. Here, the user manages (adds, updates, deletes) events sponsored by the organization. This involves setting the date and cost for the event as well as any discounts afforded to members based on membership level. This screen also allows the user to manage the members that are signed up for the event.

Events

Event Description	Event Date	Cost
Cape May 2008	2008-10-31	\$225.00
Meditation Under the Star	2008-06-14	\$65.00
Navigating Path Freedom	2008-07-13	\$35.00
Pathway to Freedom 1	2008-03-28	\$525.00
Songs of the Dream Garden	2008-05-10	\$45.00

Basic Event Info

Event Description: Event Date: Cost:

Membership Level Discounts

Friend Patron Supporter Temple Benefactor
 Family Member

Members

Member Name	Discount	Mem Cost	# Guests	\$ Guest	Tot Due	Amt Pd.	Bal Due
[Member Name]	0.00%	\$65.00	0	\$0.00	\$65.00	\$65.00	\$0.00
[Member Name]	30.00%	\$45.50	0	\$0.00	\$45.50	\$45.50	\$0.00
[Member Name]	100.00%	\$0.00	0	\$0.00	\$0.00	\$0.00	\$0.00
[Member Name]	0.00%	\$65.00	0	\$0.00	\$65.00	\$65.00	\$0.00
[Member Name]	0.00%	\$65.00	0	\$0.00	\$65.00	\$65.00	\$0.00
[Member Name]	100.00%	\$0.00	0	\$0.00	\$0.00	\$0.00	\$0.00
12 MEMBERS		\$435.50	1	\$0.00	\$435.50	\$435.50	\$0.00

6/14/2009 10:14 PM

The **Programs** screen is shown below. Here, the user manages (adds, updates, deletes) programs sponsored by the organization. This involves setting the date range and monthly cost for the event as well as any discounts afforded to members based on membership level. This screen also allows the user to manage the members that are signed up for the program.

Programs

Program Description	Start Date	End Date	Monthly Cost
Newsletter Half Page	2008-05-01	2008-05-31	\$50.00
Newsletter Quarterpage	2008-05-01		\$25.00
Newsletter Whole Page	2008-05-01		\$100.00

Basic Program Info

Description: Newsletter Quarterpage Start Month: May Start Year: 2008 End Month: (N/A) End Year:

Cost and Discounts

Monthly Cost: \$25.00

Membership Level Discounts

Friend 0.00% Patron 0.00% Supporter 0.00% Temple Benefactor 0.00%
 Family Member 0.00%

Members

Member Name	Start Date	End Date	% Discount	Monthly Cost
[Member Name]	2008-05-01		0.00%	\$25.00
[Member Name]	2008-05-01		0.00%	\$25.00
[Member Name]	2008-05-01		0.00%	\$25.00
5 CURR MEMS			CURR MO TOT:	\$125.00

Buttons: Add Member, Delete Member

Toolbar: Add Program, Edit Basic Info, Edit Cost/Disc, Delete Program, Save, Cancel, Close

Status Bar: 6/14/2009 10:19 PM

The **Payments** screen is shown below. Here, the user manages member payments for dues, events, programs, and donations.

Payments

Recent Payments Show payments made between 5 / 1 /2009 and 6 /14/2009 OK

Member Name	Date Paid	Amt Paid	How Paid	Check #	Paid For	Prog/Payment D...
	2009-06-12	\$100.00	Credit Card		Dues	
	2009-06-06	\$100.00	Check		Dues	
	2009-06-06	\$100.00	Check		Dues	
	2009-06-06	\$20.00	Check		Dues	
	2009-06-06	\$100.00	Cash		Dues	
	2009-06-06	\$75.00	Check		Dues	
	2009-06-03	\$20.00	Check		Dues	
	2009-06-03	\$65.00	Check		Event	Meditation Under...

Payment Detail

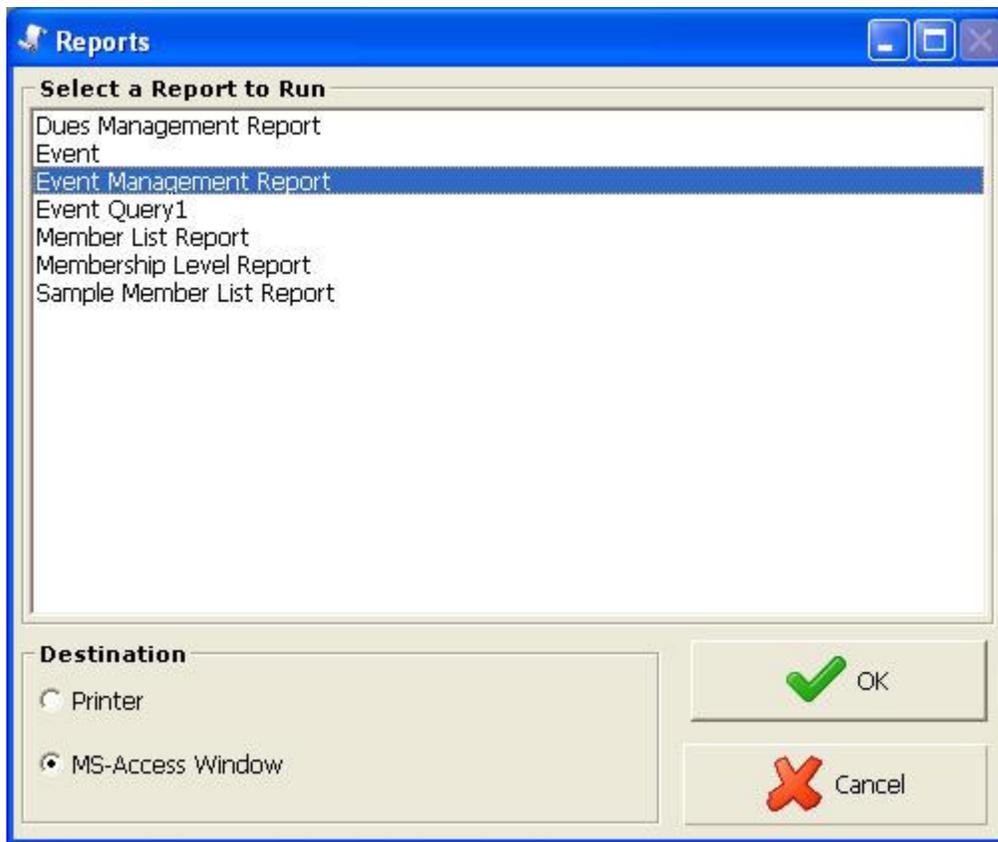
Member Name: [Member Name] Date Paid: 6 /12/2009 Amount Paid: \$100.00

How Paid: Cash Check Credit Card Check Number: 450

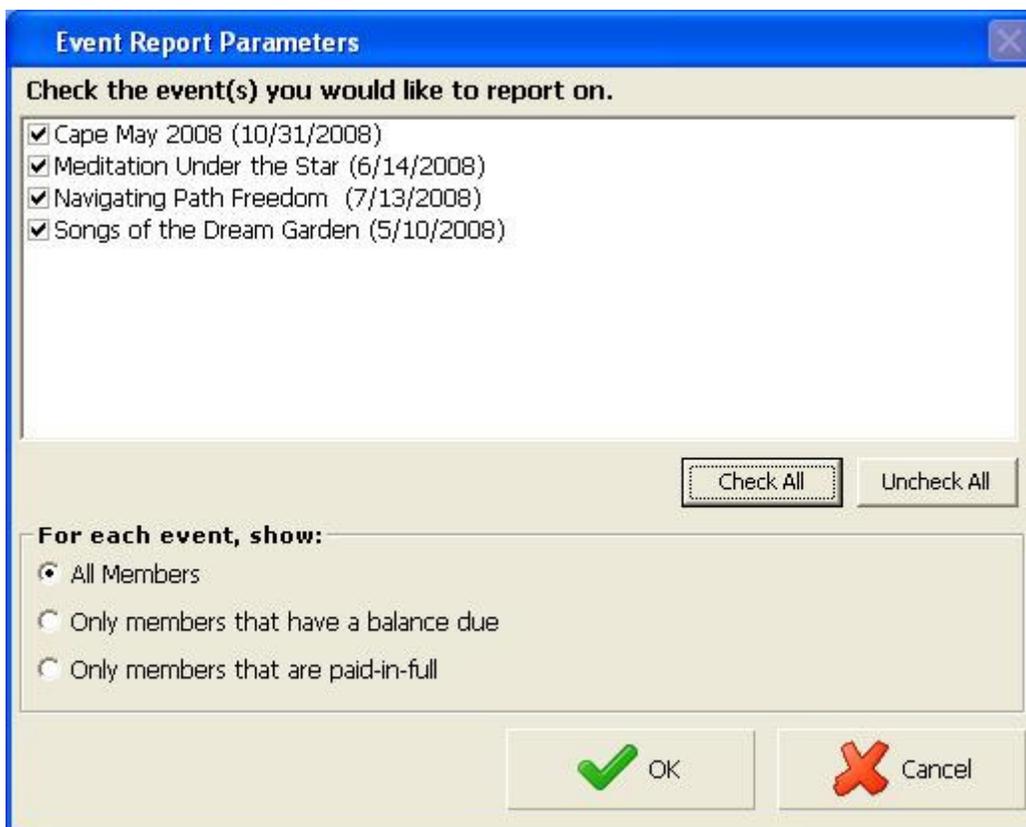
Paid For: Dues Event Program Donation

6/14/2009 10:24 PM

When the user clicks the **Reports** button on the sidebar, they are presented with a list of various reports that can be run:



Upon making a report selection, they are presented with a corresponding screen to set the parameters for the report:



Once the parameters are set and they click OK, the report is run via MS-Access:

Event Management Report

Member Name	Member Cost	Guest Count	Guest Cost	Total Due	Total Paid	Balance Due
Cape May 2008 (10/31/2008)						
William Chan	\$225.00			\$225.00		\$225.00
William Chan	\$198.00			\$198.00		\$198.00
Jack Chan	\$225.00	1	\$180.00	\$405.00	\$405.00	
William Chan	\$225.00			\$225.00		\$225.00
Jack Chan	\$225.00			\$225.00		\$225.00
William Chan	\$225.00			\$225.00	\$225.00	
Jack Chan	\$225.00			\$225.00		\$225.00
7 Members	\$1,548.00	1	\$180.00	\$1,728.00	\$630.00	\$1,098.00
Meditation Under the Star (6/14/2008)						
Jack Chan	\$65.00			\$65.00	\$65.00	
Jack Chan	\$65.00			\$65.00	\$65.00	
William Chan	\$65.00			\$65.00	\$65.00	
Jack Chan						
William Chan		1				
Jack Chan	\$65.00			\$65.00	\$65.00	
Jack Chan	\$45.50			\$45.50	\$45.50	
Jack Chan						
William Chan	\$65.00			\$65.00	\$65.00	

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When the user wants to send a form letter to a group of members, they click the **Letters** button on the sidebar, which invokes the Form Letter Wizard, which takes them through a series of screens to specify who should get what letter. In this example, the user wants to send letters to members that have payments outstanding for 90 or more days. They select the "90 Days Past Due" option in the middle area of the screen, and click the "Select from Past Due List" button.

The screenshot shows a window titled "Form Letter Wizard" with a blue header bar. Below the header is a dark blue bar with an envelope icon and the text "Form Letters and Labels". The main content area has a light beige background with a large blue heading "Welcome to the Form Letter Wizard" and a pencil icon. Below the heading is a paragraph of introductory text. A second paragraph explains an alternative selection method. A button labeled "Select from List of All Members" with a group of people icon is centered. Below this is a section titled "For Payment Past Due Mailings" with a paragraph of instructions and four radio button options: "30 Days Past Due", "60 Days Past Due", "90 Days Past Due" (which is selected), and "Current". A button labeled "Select from Past Due List" with a red stamp icon is centered below the radio buttons. The next section is titled "For End-of-Year Letters" with a paragraph of instructions, a text input field containing "2009", and a button labeled "Select Members with Payments in Year" with a calendar icon showing "52". At the bottom, there is a navigation bar with four buttons: "Back" (left arrow), "Member Search" (person icon), "Close" (blue window icon with a red X), and "Next" (right arrow).

Form Letter Wizard

Form Letters and Labels

Welcome to the Form Letter Wizard

The Form Letter Wizard will guide you through the steps necessary to generate a mass mailing for a group of selected members. The first step is to generate the list of members who will be receiving the mailing. To get started, click the "Member Search" button at the bottom of the screen.

Alternatively, if you wish to select a group of members that do not fit "neatly" into a search criteria, you can choose the desired members for the mailing from the list of all members by clicking the "Select from List of All Members" below:



For Payment Past Due Mailings

If you wish to send out a "payment past due" mailing, you can generate your selection list by clicking one of the radio buttons below and then click the "Select from Past Due List" button below:

30 Days Past Due 60 Days Past Due 90 Days Past Due Current



For End-of-Year Letters

If you wish to send out "end of year" letters (showing the member the amounts they have paid for dues, events, programs, and donations), enter the appropriate year below and click the "Select Members with Payments in Year" button.

Year: 

 Back  Member Search  Close Next 

On the next screen of the wizard, the user can create the template content (if adding a new template) or modify the content of the existing template (if desired). They also select a Save option for the template.

Form Letter Wizard

Form Letters and Labels

Form Letter Content

Using the text areas below, you can create, modify, or verify the content for the letter to be generated for this mailing. The template can optionally be saved using one of the Save Options below.

Template: **90 Days Past Due**

Subject: Payment Past Due

Body:

We have noticed that you have allowed your membership pledge to lapse for 90 days or more. Please let us know if our records are correct. Your support of [redacted] keeps our Center open as a refuge and sanctuary for so many people on their spiritual paths.

Please contact [redacted] with any questions.

The support of generous members like you makes it possible to continue as a light in the darkened corners of the world!

Save Options

Do Not Save This Template Overwrite This Template

Save New Template As: Save This Template As:

[Redacted text input fields]

Note: In the body text, the string "<<YEAR>>" will be replaced by the year entered on the first screen of the wizard and "<<PAYMENT_INFO>>" will be replaced with the member's yearly payment totals for dues, donations, events and programs.

Back Member Search Close Next

Once the letter content and save option has been set, the letters (and optionally mailing labels) can be generated. Here, they opt to open the generated letters in MS-Word. Once they click "Generate Letters", the system creates the letter for each of the selected members.

The screenshot shows a window titled "Form Letter Wizard" with a sub-header "Form Letters and Labels". The main heading is "Print Letters and Labels". Below this, there is a paragraph of instructions: "Letters and labels can now be generated. Click the appropriate button to print either one, once your printer is loaded with paper or label forms respectively. Alternatively, you can choose to open the letter and/or label set in MS-Word. Additionally, you can choose to send the letters as e-mail attachments."

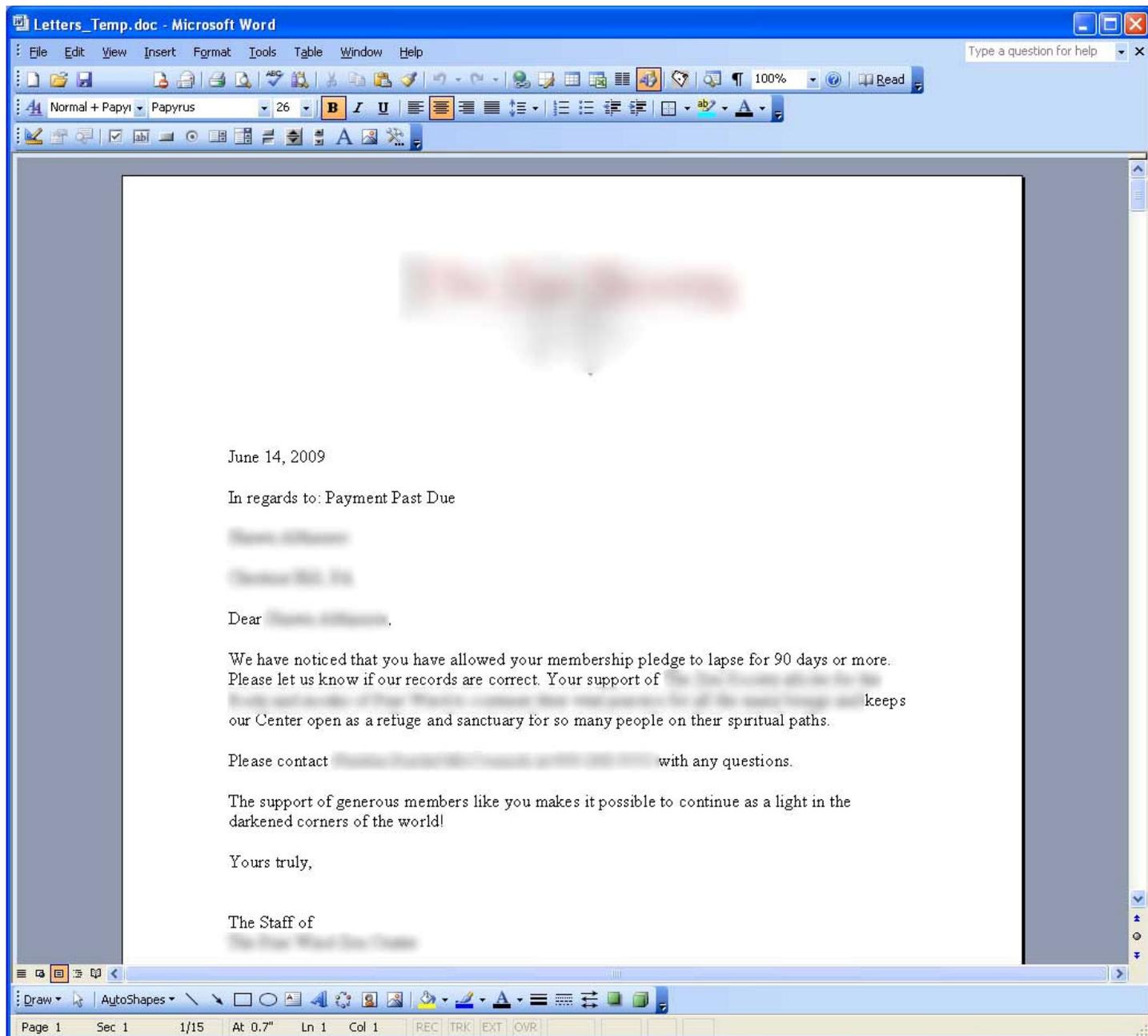
There are two sections for output options:

- Letters - Output Options:** Includes radio buttons for "Open in MS-Word" (selected), "Print Directly to Default Printer", and "E-mail as Attachments". A "Generate Letters" button is to the right.
- Labels - Output Options:** Includes radio buttons for "Open in MS-Word" (selected) and "Print Directly to Default Printer". A "Generate Labels" button is to the right.

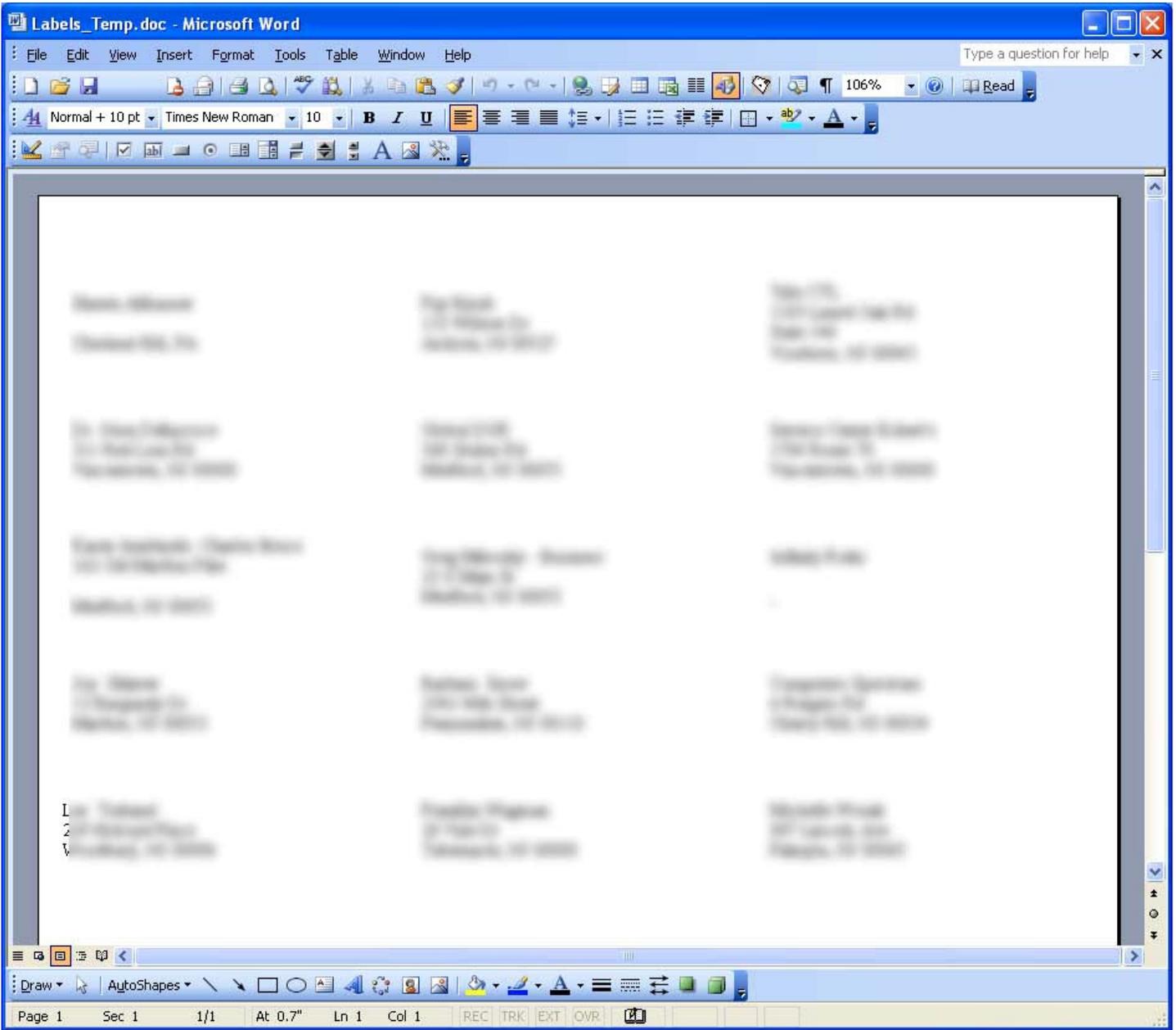
A status bar indicates "Generating letters. Please wait." with a progress indicator consisting of seven blue bars. Below this is a scrollable text area showing the progress: "Generating letter for [blurred name]", "Generating letter for [blurred name]", and "Generating letter for [blurred name]".

At the bottom, there are four navigation buttons: "Back" (left arrow), "Member Search" (person icon), "Close" (window icon with X), and "Next" (right arrow).

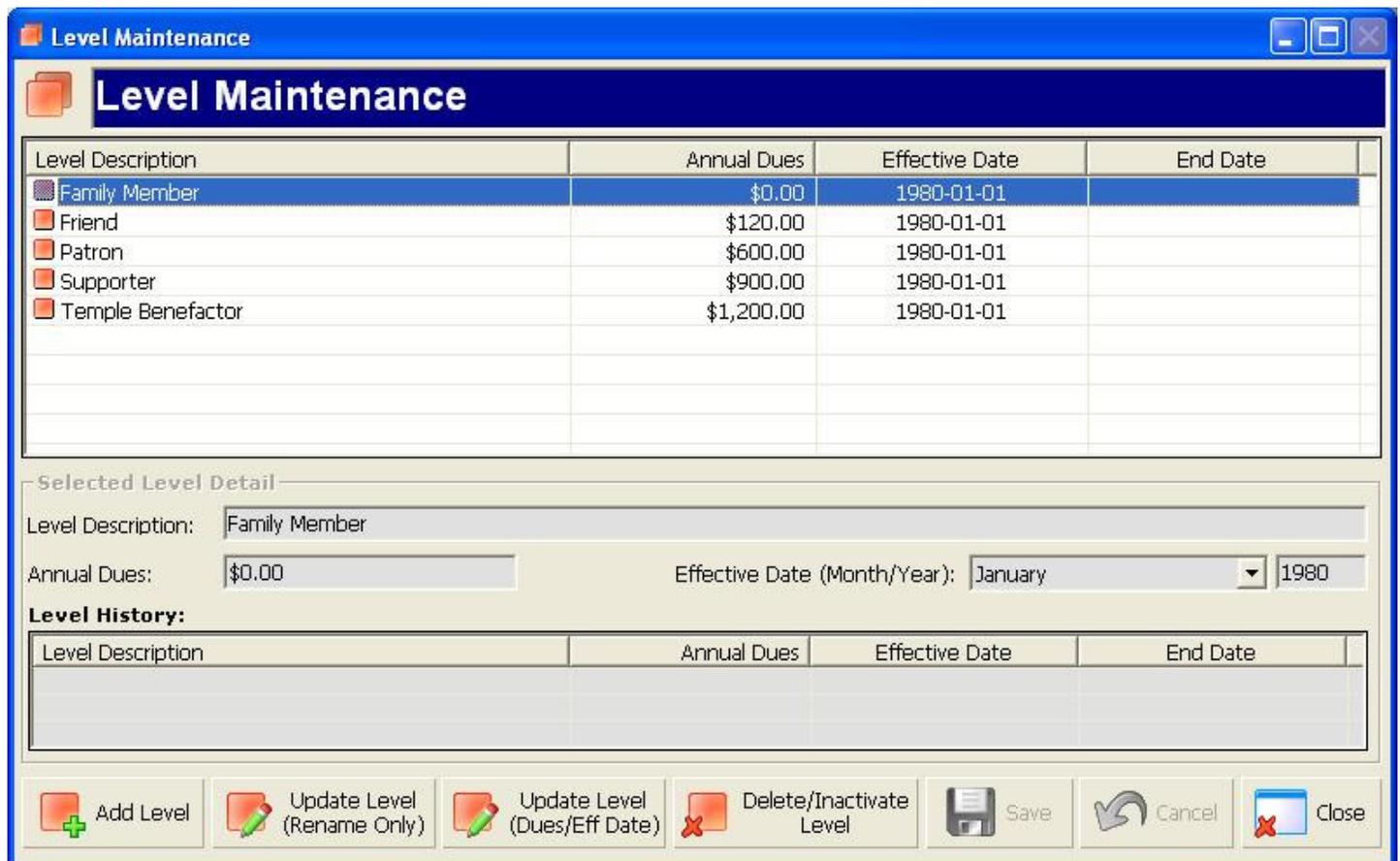
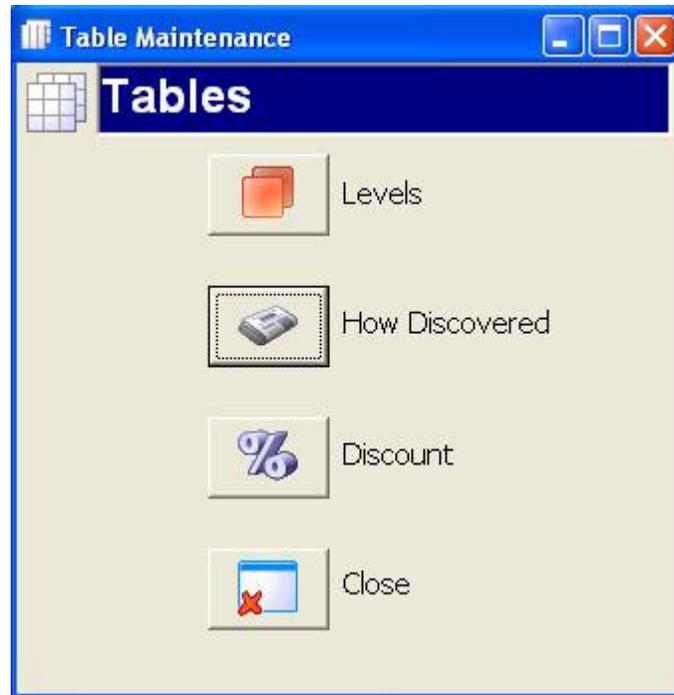
When the system is done generating the letters, the letters open in MS-Word:

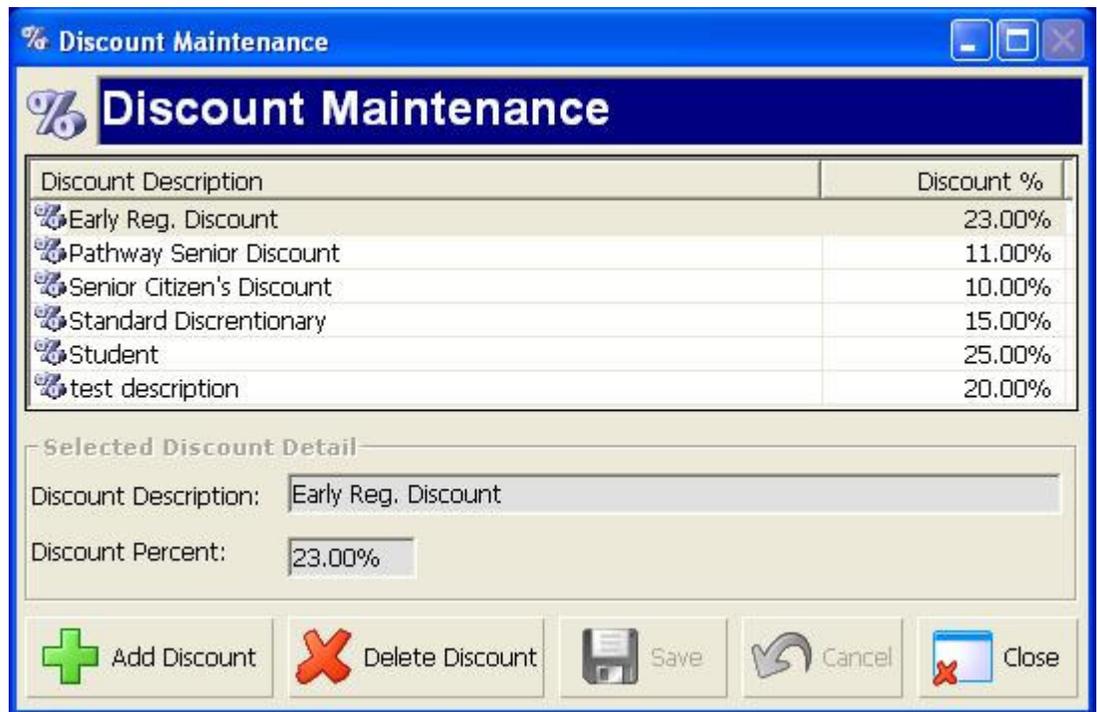


The same process is repeated for the mailing labels:



The **Tables** screen allows the user to maintain various back-end tables (pick lists) used by the application. These include membership levels, "how discovered", and discounts.





The **Import/Export** feature allows the user to create a file to export, or to import a file from an external source. In the first example, the user is going to export new member records (the user can opt to export only those records that have not previously been exported (new), or export all member records).



Next, the user selects which fields from the member records they want to export:

The screenshot shows a Windows-style dialog box titled "Import/Export Wizard" with a blue header bar. Below the header is a dark blue bar with the text "Import / Export" and a database icon. The main area has a light beige background with the title "Select Fields to Export" in large blue font. Below the title is a paragraph of instructions: "Select the fields to be contained in the export file by checking the appropriate field names in the list below, then click Next." A list of fields is shown in a white box with a thin border, each preceded by a checked checkbox. At the bottom of the list box are two buttons: "Select All" and "Deselect All". At the very bottom of the dialog are three buttons: "Back" with a left arrow, "Close" with a window icon and a red X, and "Next" with a right arrow. The "Next" button is highlighted with a dashed border.

Import/Export Wizard

Import / Export

Select Fields to Export

Select the fields to be contained in the export file by checking the appropriate field names in the list below, then click Next.

- E-Mail Address
- First Name
- Last Name
- Address Line 1
- Address Line 2
- City
- State/Province
- Zip/Postal Code
- Home Phone Number
- Honoric (Mr./Ms./etc.)
- Suffix (Jr./Sr./MD/etc.)
- Country

Select All Deselect All

Back Close Next

Next, the user selects the file format and location for the exported file:



The user then clicks the "Export Now" button to complete the export process:



For the import process, the user chooses "Import Member Records" on first screen of the Import/Export Wizard:



Next, the user locates and specifies the format of the import file:

The screenshot shows a Windows-style dialog box titled "Import/Export Wizard" with a blue header bar. Below the header, the text "Import / Export" is displayed in white on a dark blue background. The main content area has a light beige background and is titled "Import File Location and Format" in large blue font. Below the title, there is a paragraph of instructions: "Specify the location (folder and filename) where the import file is located either by typing in the full file path or by clicking the Browse button, which will open a standard Windows Open dialog box which will enable you to navigate to the appropriate folder and select the appropriate filename. Specify the format of the import file (comma-delimited or tab-delimited) by selecting the appropriate option in the File Format section. Click Next when done." Below this text, there are three sections: 1. "File Path" section with a text input field containing a file path ending in "contacts.csv" and a "Browse ..." button with a folder icon. 2. "File Format*" section with two radio button options: "Comma Delimited" (selected) and "Tab Delimited". 3. A note box with an information icon and the text: "*Note: The first record of the import file MUST contain the field names. If the import file is in comma delimited format, the field names in the first record as well as the data in the subsequent records MUST NOT contain embedded commas." At the bottom of the dialog, there are three buttons: "Back" with a left arrow, "Close" with a window icon and a red X, and "Next" with a right arrow.

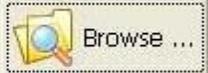
Import/Export Wizard

Import / Export

Import File Location and Format

Specify the location (folder and filename) where the import file is located either by typing in the full file path or by clicking the Browse button, which will open a standard Windows Open dialog box which will enable you to navigate to the appropriate folder and select the appropriate filename. Specify the format of the import file (comma-delimited or tab-delimited) by selecting the appropriate option in the File Format section. Click Next when done.

File Path

 Browse ...

File Format*

Comma Delimited

Tab Delimited

 *Note: The first record of the import file MUST contain the field names. If the import file is in comma delimited format, the field names in the first record as well as the data in the subsequent records MUST NOT contain embedded commas.

 Back

 Close

Next 

The user would then click the "Import Now" button to complete the import process:

