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 **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 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.

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 screen showing the Membership Database [Events] window.

The Members list within the Events screen:

Member Name	Discount	Mem Cost	# Guests	$ Guest	Tot Due	Amt Pd.	Bal Due
	0.00%	$65.00	0	$0.00	$65.00	$65.00	$0.00
	30.00%	$45.50	0	$0.00	$45.50	$45.50	$0.00
	100.00%	$0.00	0	$0.00	$0.00	$0.00	$0.00
	0.00%	$65.00	0	$0.00	$65.00	$65.00	$0.00
	0.00%	$65.00	0	$0.00	$65.00	$65.00	$0.00
	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**

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.

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

Member Name	Date Paid	Amt Paid	How Paid	Check #	Paid For	Prog/Payment D...
Lewis, Jeff	2009-06-12	$100.00	Credit Card		Dues	
Thatte, Lisa	2009-06-06	$100.00	Check		Dues	
Book, Richard	2009-06-06	$100.00	Check		Dues	
Wagman, Frankie	2009-06-06	$20.00	Check		Dues	
Schenbach, Mary	2009-06-06	$100.00	Cash		Dues	
Smith, Albert	2009-06-06	$75.00	Check		Dues	
Wagman, Frankie	2009-06-03	$20.00	Check		Dues	
Miller, Ronald	2009-06-03	$65.00	Check		Event	Meditation Under...

Payment Detail

Member Name: Lewis, Jeff   Date Paid: 6 /12/2009   Amount Paid: $100.00

How Paid: ○ Cash   ○ Check   ● Credit Card   Check Number: 450

Paid For: ● Dues   ○ Event   ○ Program   ○ Donation

Add Payment   Edit Payment   Delete Payment   Save   Cancel   Close

When the user clicks the **Reports** button on the sidebar, they are presented with a list of various reports that can be run:
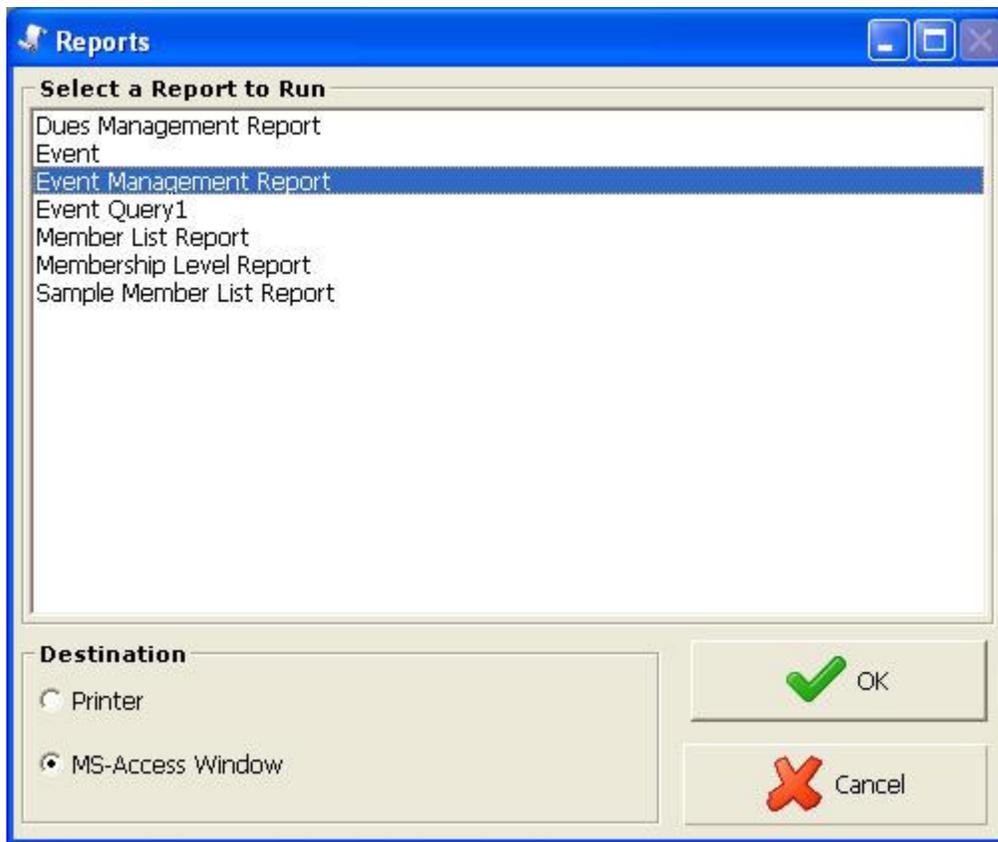
Upon making a report selection, they are presented with a corresponding screen to set the parameters for the report:
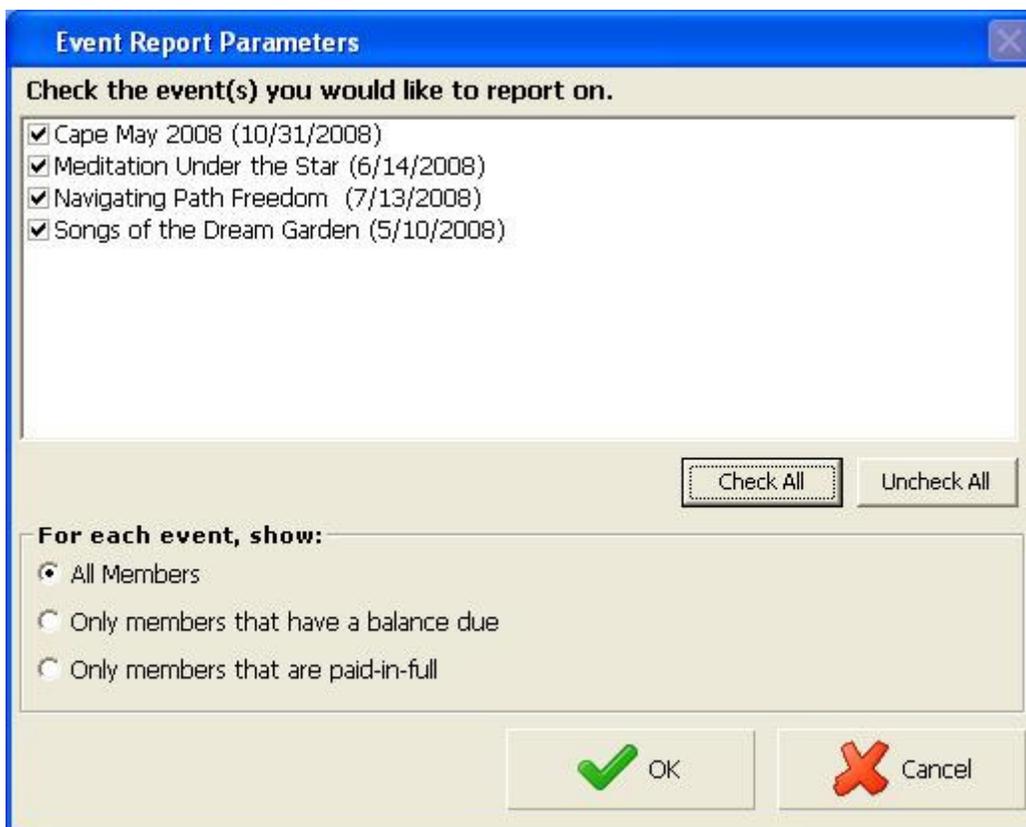
Once the parameters are set and they click OK, the report is run via MS-Access:

Event Management Report

Member Name	Member Cost	Guest Count	Guest Cost	Total Due	Total Paid	Balance Due
Cape May 2008 (10/31/2008)						
Athinson, Diana	$225.00			$225.00		$225.00
Coleman, Rina	$198.00			$198.00		$198.00
Smith, Laura	$225.00	1	$180.00	$405.00	$405.00	
Milecky, Roxanne Day	$225.00			$225.00		$225.00
Iorio, Barbara	$225.00			$225.00		$225.00
Tabisiel, Lee	$225.00			$225.00	$225.00	
Wu to, Michelle	$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)						
Purdy, John	$65.00			$65.00	$65.00	
Plean, Barb	$65.00			$65.00	$65.00	
Salmon, Frieda	$65.00			$65.00	$65.00	
Lavery, Jeff						
Mitchell, David						
Prule, Bob		1				
Prince, Ronald	$65.00			$65.00	$65.00	
Chang, Rose	$45.50			$45.50	$45.50	
Pero, Michael						
Proddy, James	$65.00			$65.00	$65.00	

Sunday, June 14, 2009

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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.

Continuing the example, the list of members with payments outstanding for 90 days or more is displayed. If the user wants to send the form letter to all these members, all they need to do is click "Next"; otherwise, they can choose to exclude specific members before moving on.

On the next screen of the wizard, the user can either create a new template for the letter or use an existing template. Here, they choose to use the existing "90 Days Past Due" template:

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.

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.

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

June 14, 2009

In regards to: Payment Past Due

Dear ,

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 keeps our Center open as a refuge and sanctuary for so many people on their spiritual paths.

Please contact 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!

Yours truly,

The Staff of

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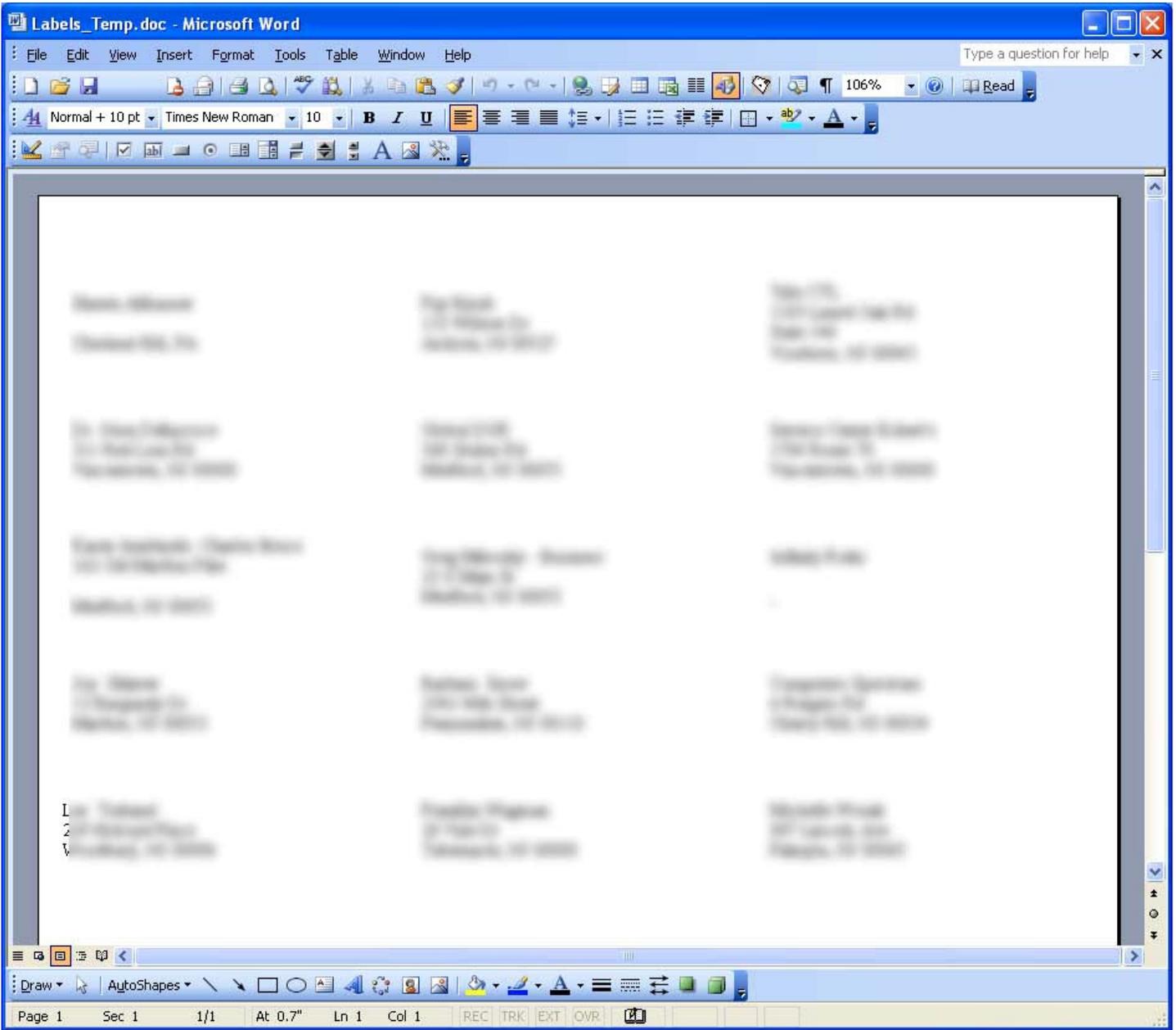
The **Tables** screen allows the user to maintain various back-end tables (pick lists) used by the application. These include membership levels, "how discovered", and discounts.

How Discovered Table Maintenance

Internet
Friend
Print
Newspaper
Joint Effort
Starting Point

Add

Delete

Close

Discount Maintenance

Discount Description	Discount %
Early Reg. Discount	23.00%
Pathway Senior Discount	11.00%
Senior Citizen's Discount	10.00%
Standard Discrentionary	15.00%
Student	25.00%
test description	20.00%

Selected Discount Detail

Discount Description: Early Reg. Discount

Discount Percent: 23.00%

Add Discount   Delete Discount   Save   Cancel   Close

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:

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

Import/Export Wizard

Import / Export

Prepare Export File

Specify whether you want the fields in the export file to be separated by commas or tabs by selecting the appropriate option in the File Format section. Specify the location (folder and filename) where the file is to be saved either by typing in the full file path or by clicking the Browse button, which will open a standard Windows Save dialog box which will enable you to navigate to the appropriate folder and type in the desired filename. Click Next when done.
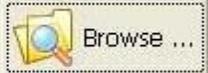
File Format

- ⦿ Comma Delimited

- ○ Tab Delimited

File Path

C:\export_test.csv   Browse ...

Back   Close   Next

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:

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Next, the user maps the fields on the import file to the corresponding member fields:

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