Membership Director

Table of Content

Membership Director
User Manual

Membership Director is an administrative tool that enables a club's membership committee (officer) or treasurer to maintain key information about the club's members, their dues, contributions, and other necessary information. Designed to operate in a Windows environment (Windows95/98/ME/2000/NT/XP) users will find **Membership Director** easy to operate without any training.

A Help file can be accessed at any time by pressing the F1 key on the keyboard. A help screen applicable to what is on the screen will be displayed.

Hardware Requirements

Before installing **Membership Director** check that your computer meets the following minimum requirements:

- A personal computer with a Pentium processor chip rated with 200 MHz or higher is required. The faster the processor the better **Membership Director** will be able to handle the application's data manipulations. (Optimum **-** Pentium 300mhz or better)
- 16 MB of available memory (WindowsXP requires 128 MB)
- VGA, SVGA, XGA, 8514/A or compatible video graphics adapter
- Hard disk with at least 10 MB available
- Mouse of equivalent pointing device
- Printer

Installation

Membership Director is available either as a download or can be ordered with a CD.

Installing from the CD
1. Place the CD in your CDROM drive.
2. Select the 'Run' menu.
3. In the run dialog box enter 'D:MD2-SETUP' where 'D:' is your CDROM drive. If your CDROM drive is something other than D: then

change it accordingly.
4. Click OK in the Membership Director v2.0
5. Click the 'Unzip' in the WinZip Extractor.
6. Click OK to the message '11 files Unzipped Succesfully'
7. Click OK on the message Missing Runtime Files will now be installed.
8. On the dBasePlus 2.21 Runtime Engine (and BDE) click 'Next' on the Destination Folder for the runtime files. The default location is the **c:\memb_dir** folder. We recommend you do not change this.
9. Click 'Next' for the Destination Folder for BDE. Do not change destination.
10. Click Finish
11. It takes a few seconds for the next screen to come up - Welcome to the Membership Director Vers. 2.0 Setup Wizard. Click 'Next'
12. Click the 'I accept the agreement' and 'Next'
13. Note the Readme.TXT file - for UserID and password – default is *user* in both cases. Click 'Next'
14. Click 'Next' for the Start Menu folder
15. Click 'Install'
16. Click 'Finish'

To Install from the download use the Run on the Start Menu
1. Select MD201.EXE from the download folder
2. Complete steps 4 to 16 above

Install Wizard

The first time **Membership Director** is run the Install Wizard will take the user through six screens to collect the initial information about the organization and establish needed lookup codes. Do not leave these blanks or you will receive errors as you run the program. Create at least on record in each of the lookup codes. The Install Wizard's initial screen advises users of the following sequence.

1 Configuration Screen - allow the user to enter the basic information about the association and set various preferences.
2 Type of membership - allow you to establish your membership categories.
3 Financial Accounts - create your income and expenses accounts
4 Committees - allow establishment of association's committees
5 Chapter - create any chapter or sub-organizational units.
6. Contribution – create types of contributions to be received

Press the 'Next Setup Screen' button located on the right side of each of the Install Wizards screens when you have finished establishing the codes for the page you are on. Install Wizard then advances to the next screen. Press the 'Exit' button to exit from Install Wizard without setting up the codes. The information entered in the Install Wizard's screens can be changed later by choosing the 'Configuration' menu.

The Install Wizard does not allow creation of all lookup codes, i.e. awards and interest. Use the Configuration menu to create these codes before using these items.

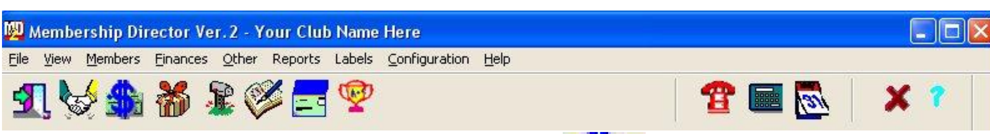
Converting from Version 1

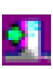
The menu option 'Convert from Version 1' of the File menu is a special importing feature for users of Version 1 who desire to transfer their data from Version 1 to Version 2.

This is a one time opportunity. Once the data is converted this menu option will no longer be active. If the conversion is interrupted the menu option may not be updated. Reusing the 'Convert from Version 1' may result in duplication of records. To avoid being interrupted be sure you have selected in Configuration the type of telephone number formatting Version 1 was using.

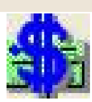
By default, **Membership Director** will look for the Version 1data in the folder C:\WMember. If it is unable to find this folder you will need to direct **Membership Director** where you installed the earlier version.

Tool Bar

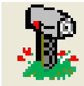


 Close Membership Director

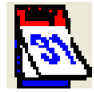
 Add or Editing Members

 Dues Payment

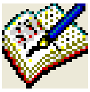
 Contributions Received



Email

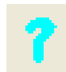


Calendar



Attendance

Telephone



Help

Menu Bar

The Menu Bar consists of nine menus and is located immediately below the window title bar and above the tool bar. The nine menus include:

File	File management items (backup, restore, index, import, export)
View	Toolbar (expose or hide)
Members	Add/Edit members, email, committees, awards, interests and more
Finances	Write checks, dues, contributions
Other	Attendance, Association History
Reports	Printed lists, summaries, analysis
Labels	Mailing address labels
Configuration	Establish lookup codes, set preferences
Help	Help, record registration key

Common Actions for all Screens

The buttons below are commonly found on many data entry screens.

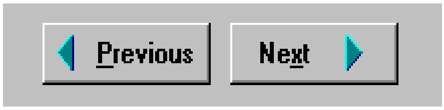
New - new member, new code, new dues payment, etc.

Edit - edit the displayed information.

Delete - Eliminate the displayed information from the data files.

Save - Save the displayed information.

Exit - quit the current screen, abandoning what has been entered.



These buttons enable navigation to the next or previous record like the next member or code or the previous member or code

Movement on tab pages

- Tabs on screens move from page to page.
- Tab key on keyboard moves cursor from one data entry field to next
- Tab key, when at last data entry on page, moves to first data entry on next page
- Both the Tab key and Enter key on keyboard moves cursor in browses between columns

Configuration

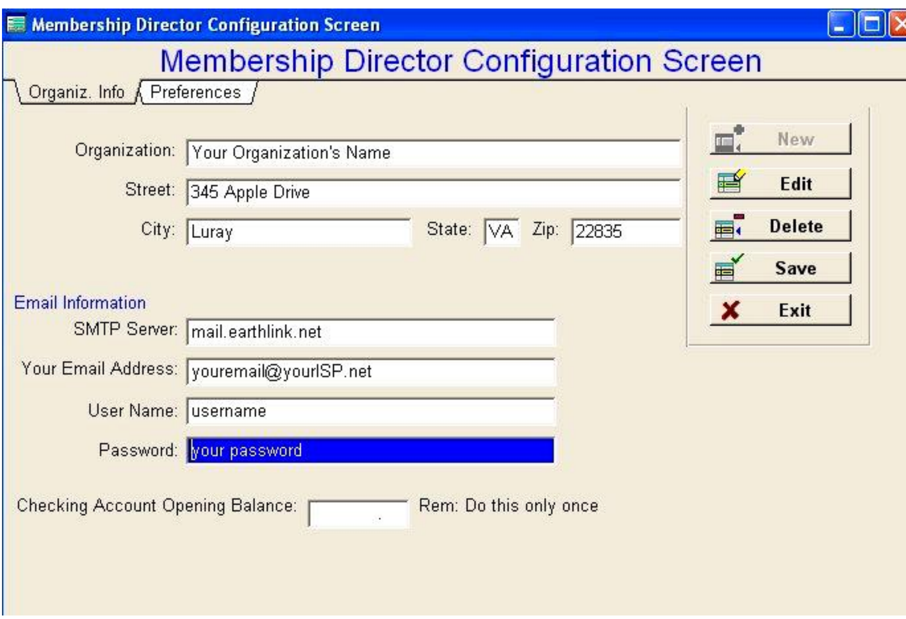
Selecting the Organization menu option from the 'Configuration' menu will activate the 'Organization Configuration' screen. This screen collects the basic data about your organization and other important information.

Be sure to complete the following:

Organization Info Page

Record the basic information about your organization.

Email Information: If you plan to send emails to your members from within **Membership Director** enter the requested information. SMTP is that of your Internet Provider. Normally this will be 'SMTP.AOL.COM' or "MAIL.EARTHLINK.NET" where your ISP data is listed 'SMTP' or 'MAIL'.



Enter your checkbook balance here if not entered with the Setup Wizard. Once entered you cannot change the amount.

Preferences Page

- Select a Drive for Backup - This is normally the drive holding your floppy disk - usually Drive A, but it may be a ZIP drive, Super Drive or external hard drive and their drive designation can be used here. The default drive is where **Membership Director** will place the back up of all data files. Membership Director cannot backup directly to your CD ROM RW Drive.
- Types of labels - 3 Avery label types are available (5160, 5161, 5162). The 5160 label is 3 labels across and 10 down, the 5161 label is 2 labels across and 10 down, and the 5162 label is 2 labels across and 7 down. You must select one type. Failure to select a label type will mean that Membership Director will print nothing - a blank screen.
- Printing the organization logo on membership cards and nametags. The logo must be a .jpg or .gif image file. **To Add Logo -** double-click the logo space. When the Specify Binary Field Type dialog box appears select 'Image'. Then the built-in Image View appears. Right-click on Viewer. A File Import dialog box opens. Select a file of the appropriate type (.jpg, .gif), and then click OK. *NOTE:* This window will be minimized. Find it on the task bar to complete.
- Membership expiration. Select whether the membership expires on set date or on anniversary of joining the organization. If your memberships will expire on a given date then enter the date and click the 'Change Now' button to change all members, except life members, to expire on the date entered.

International Formatting

- Selecting format for displaying dates (MDY, DMY, YMD).
- Selecting the desired form for displaying telephone numbers -US (999)999-9999 or no format.

Default Page

The User must choose the following Address Label Defaults

- Printing envelopes in lieu of address labels
- Displaying name with or without spouse name on address label
- Showing expiration date on address labels
- Displaying title (salutation) with name on address labels

You may choose a default City, State, or Zip/Postal. This saves having to enter this information if most of your members are from the same city, state or have the same zip/postal code.

Lookup Codes

Lookup Codes are short abbreviations that will differentiate one code from another. These codes allow the descriptive name to be displayed in the various drop-down lists. When you select an item from a list it is the code that is stored in the data files not the actual descriptive name. As example, a Type of Membership code for 'Active/Regular' could become 'ACT'. ACT takes up three characters much less than the longer more descriptive title.

Membership Type Code

Every organization has their own membership categories/types. **Membership Director** allows organizations to establish, and use, their own codes. These are defined by using the Lookup Code menu option and Type Member code menu options in the Configuration menu. The code is three characters long. The descriptive name is what will appear on reports.

Some typical membership types are:

STU - Student	ACT - Active	ASS - Associate
NON - None Member	FUL - Full	FAM - Family

State Code

This lookup code is best known because it is used everyday. Everyone uses the state abbreviation not the full name of the state. The state lookup code is the standard two letter abbreviation although a three character code can be entered for countries that use a three letter abbreviation for their states.

Chapters

Sub-units of an organization, or Chapters, are often formed to provide meetings in different locations or meeting on different topics. A computer club might have SIG (special interest groups), while a trail club might have different units through out the state or region.

Committees

All clubs or associations have committees. **Membership Director** can track an unlimited number of committees and members assigned to the committee.

Committee codes are created in 'Configuration' and consist of two characters. Typical examples include

OF Officers (as a group not as individual)
EX Executive Committee
PU Publication Committee
ME Membership Committee
PR Program Committee
W9 Windows95 SIG

The current officers are designated on the individuals Membership Information screen. Individual officers and their positions are also recorded in the Association History option. Select the Special menu and Association History menu option.

Officer/Position

These codes are the position you have within in your organization. They consist of two characters, examples VP **-** Vice President, MD **-** Membership Director. To create:

- Select the 'Configuration' menu.
- Select Lookup Codes menu option.
- Select Office/Position menu option.

Contribution Codes

Most clubs accept donations from both members and non**-**members. The most common type of contribution is cash or volunteer help. Codes are created in 'Configuration Menu', Lookup Codes menu option and Contribution Codes menu option. Codes are two characters in length. Typical examples include:

CA Cash
TY Typing
NP New Product
UP Used Product
OF Office help
PA Painting

Country Codes

This lookup code is also well known because it is used frequently. Everyone uses the country abbreviation not the full name of the country. The country lookup code is the standard two letter abbreviation. Example: **- US** for United States, **UK** for United Kingdom

If you don't want the country code to be displayed on address labels **-** leave the country code blank on the Membership Information Screen.

Interests (of association members) Codes

Periodic survey of members regarding their interest about your club or the work of the club can provide helpful information for planning programs, work projects, or articles in your newsletter. This keeps the club focused on the interests of your members.

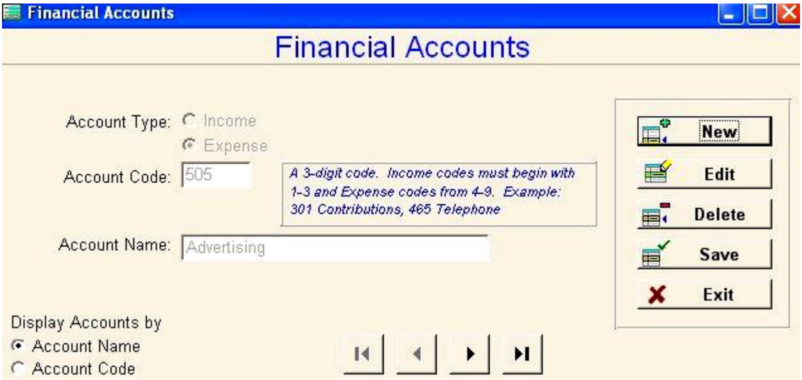
Adding interest codes are similar to other lookup codes. Assigning these codes to your members is the same as adding officer or committee codes to a member.

Financial Accounts Codes

Financial accounts must be established for all income and expense items that you want to track. Most income is from dues and contributions but may include grants, interest or fees charged members. Expense accounts include bank fees, meeting expenses, membership supplies, rental and others. The codes are three digits long. Income codes begin with 1, 2 or 3 while expense codes begin with 4, 5, 6, 7, 8, or 9. As example – income accounts 101 would be Dues, 102 Contributions, and expense accounts 401 Bank Fees, 402, Meeting Expenses, 403, Membership Supplies, and so forth.

These codes are established using the Financial Accounts menu option in the Configuration menu. The Financial Accounts screen, seen below, is like other lookup code screens.

Financial accounts cannot be deleted if they are being used in any transaction.

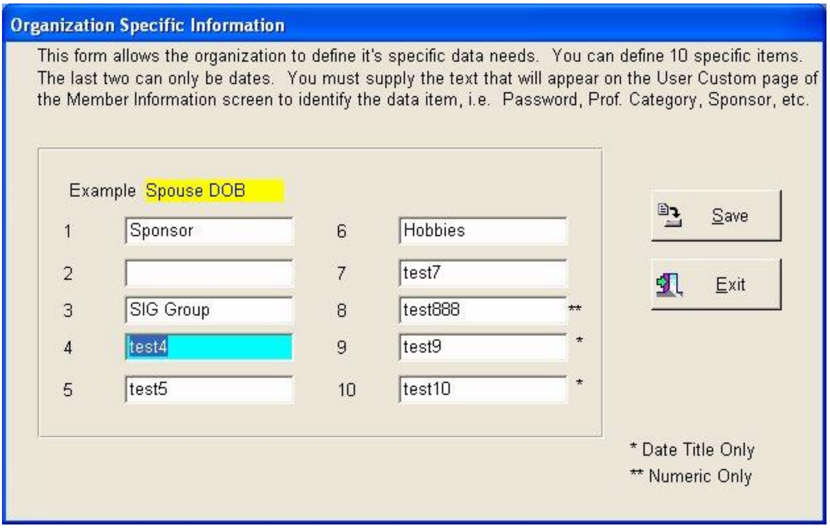


Custom Information

Membership Director while being comprehensive in the data collected cannot anticipate the need for data collection that every organization may have. To provide you with the ability to collect this additional data M**embership Director** provides you with ten (10) fields that the user can define/customize to meet their need.

Select the 'User Defined Info' menu option from the Configuration Menu. For each of the ten fields you need to enter a short descriptive text that will appear on the User Custom page of the Member Information Screen. This descriptive text will enable the user to know what to enter.

Field 9 and 10 are date fields. Only dates may be entered here. Field 8 is a numeric field and will only accept numbers.



There are three reports available for the user-defined information.

1. A listing of members with some content in one specified field.
2. Search for a particular item in one specified field.
3. List of members with all the content of a specified field and the member associated with the info.

Special Flag

A code you create for your members that enable you print group labels or membership cards. The code is a single character. A maximum of five codes can be entered on the Membership Information Screen - Miscellaneous

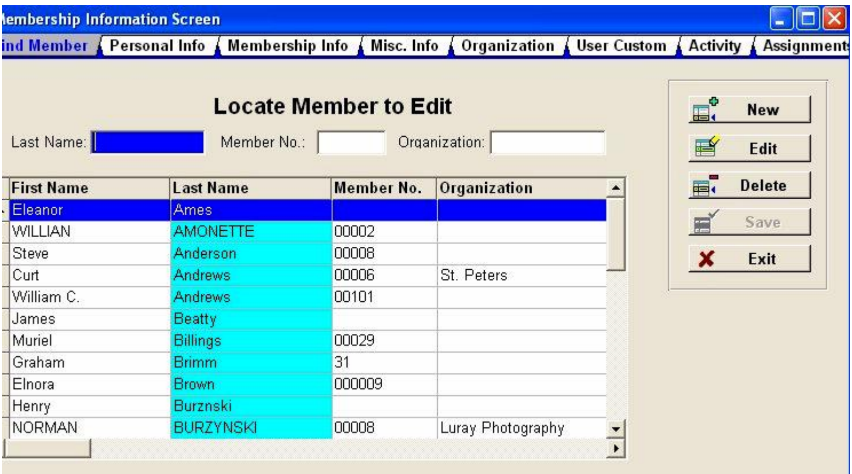
Info page for each member. There are no lookup codes for the flags you create.

Examples: Enter 'SC' for Sponsor, Charter. Enter 'R' for Organizational Represenitive. Or enter 'SCR' for all three.

Managing the Members of the Organization

Add or Edit Members

The Add / Edit button brings up the Membership Information Screen (see below). It can also be activated from the Members Menu. Select the Add New Members menu option.



The Membership Information screen has eight tabs across the top of the screen. Each tab will display a screen of related information.

The tabs on this form include:

Find Member	Start here to add new member, edit a previously entered member or delete a member
Personal Info	Contains member's info - name, telephone, address, etc.
Membership Info	Type membership, expiration, dues paid, etc.
Misc Info	Email, sponsor, photo
Organization	The association this member represents
User Custom	Ten user-defined fields
Activity	Publications, events, contributions
Assignments	Committees, interests and awards

Find Member Page

The first page of the Membership Information screen ('Find Member') allows you to locate members already entered or to enter new members. You can also delete (transfer) a member to the inactive database from this screen.

This screen, shown on previous page, allows you to find the member three ways. Use the first entry field 'Last Name' to locate a previously entered member by entering first 2-4 characters of the last name. As you enter these characters the members whose last name begins with the entered characters will be displayed in the browse/grid located in the center of the page. Entering the letter 'c' will display the members with the last name beginning with the letter entered, or in this case 'c'. As each letter is entered the search drills down to the member. Except for the most common names entering 3 or four characters should locate the member. For common names like Smith enter 'Smith, H' this will locate the first member with the last name of Smith and the first name beginning with the letter 'H'.

Use the second entry field 'Member No.' to locate a previously entered member by entering the member's member number. As with the 'Last Name' search, the number entered drills down to the member. Zeros must be entered. Entering '04' will locate the first member whose member number begins with a '04'.

Use the third entry field 'Organization' to locate members by the organization they represent. Again, as with the 'Last Name' search, **Membership Director** will drill down to the organization.

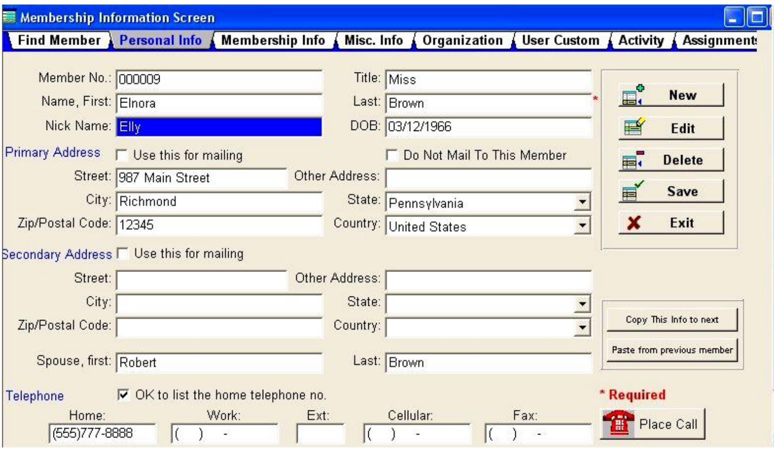
Note: Place the cursor in the 'Member No.' and, using a barcode reader, swipe barcode on the membership card to quickly locate the member.

The push buttons along right side include:

New Member Add new member
Edit Edit information of member being displayed
Delete Delete displayed member by transferring them to inactive data files.
Save Save information (***entire record not just 1 page***)
Cancel Cancel operation and close window

NOTE: The 'Tab' key moves the cursor from one data entry location to another. Tabbing from the last data entry on one page automatically moves to the first data entry on next page. It is not necessary to click the tabs at the top.

Personal Info Page
This page collects the personal information about the member - name, address, etc. It is displayed below.



A "Member No.' is not required. If used, it can be six numbers or a combination of a letter and five numbers. Some clubs use the letter to designate the type of membership. After entering a number **Membership Director** will add leading zeros. You cannot have duplicate member numbers.

Again use the TAB key on the keyboard to move from item to item. In checkboxes hit the space bar and a check will be inserted. Or use your mouse to place a check mark in the appropriate check boxes.

The 'Title' is the mailing title - Mr., Mr. & Mrs., MD, Ms.

A 'Last Name' is required.

Be sure to check the address to be used for mailing. Address labels will be printed for this address.

Be sure to check the address to be used for mailing. Address labels will be printed for the address checked.

Depending on the selection made in Configurations, telephone numbers will either be displayed in the US format (999)999-9999 or in the free style 99999999999 for our international users.

When more than one new member has the same information - address, telephone, etc. use the 'Copy Info to Next' button to copy the contents of this member. This button places the information in a buffer. Now start a new member record and click the 'Paste from Previous Member' button. This places the information from the previous member in all fields. Now change the name, membership number and anything else that is different and save.

The rest of the first page is routine. One exception is to leave the country code blank if you don't want the country to be displayed on the address labels. It may be necessary to create a blank country code for this purpose.

When you tab from the Fax telephone entry **Membership Director** automatically advances to the next page 'Membership Info'. The same will happen on all pages, as you tab from the last field the next page will be displayed. Do not save until all information for this member has been entered on all screens.

Membership Information Page
A membership type, also referred to as a membership category, **is required**. Be sure to use the Configuration Menu (Membership Codes menu option) to create these codes and other lookup codes. The lookup codes, that you established, will appear in the drop down list.

While entering a new member you can show when the dues payment was last received. Do not use this screen to enter dues received, use the Dues Received toolbar button instead. The information show here will be updated automatically when the dues is entered from the dues received toolbar button.

The expiration date is automatically inserted using the period established for the membership type. If the type of memberships covers an annual period then 365 days are added to the old expiration date.

Misc Info (Miscellaneous Information) Page
The email button can be used to send an email message to this member and this member only. The Members Menu also contains an email option where you can send email to one or more members at the same time with or without an attachment.

The Special Flag holds up to 5 single letter codes to separate labels or membership cards. These single character codes are good for things that you can say yes or no to or something the member either has or they don't. These codes cannot be created or edited, they are just something known to the user. There are no Lookup codes for the flags you create. The special flag can be edited as a group or each member individually. Examples NP - New, probationary; FNC - Free materials, No Dues, Charter.

Membership Director can store the member's photo. To do this:

- Double click on the photo space to activate the process
- When the Specify Binary Field Subtype dialog box appears select Image. The built-in Image Viewer appears.
- Right-click on viewer. A file import dialog box opens.
- Select a file of the appropriate type
- Click OK

To delete a previously selected photo repeat the processes above but select the file 'blank.gif' in the c:\memb_dir folder.

Organization Page
Some organizations like the Chamber of Commerce, have members who are representatives of other businesses or organizations. This page of the Membership Information screen allows the organization information to be collected.

User Custom Page
If you have customized one or more of the ten user-defined fields then the title you entered will be displayed, otherwise they field labels will be Member1... Member10. Use the 'Configuration Menu' and the 'User Defined Info' menu option to establish these labels.

Edit Member

 Click this button on the tool bar OR select 'Add/Edit Member' from Member menu.

Use the 'Locate The Member' page to find the member. Enter the first few letters of the member’s last name. As you enter the letters **Membership Director** positions the cursor on members with names beginning with the letters you entered. Entering a 'S' will position to the first member with last name starting with 'S'. Entering 'SM' will position the browse at 'Smith' but will bypass 'Simmons'.

Click on the 'Edit' button when the member record is highlighted. Then select the appropriate tab at the top of the page to find the information that you intend to edit.

Multiple Member Edit

- Select Members menu
- Select Multiple Member Edit menu option
- Locate the member by entering their last name
- Once member is highlighted click the 'Edit' Button
- Tab to the field(s) needing to be changed
- Make your editorial changes and click the 'Save' button

Remove Member

Membership Director has two remove functions. One is to completely delete (remove) a members from the data files. The other transfers a member from active data files to inactive data files (See Transfer Member). A person in the inactive files can be reactivated to active files if they later rejoin your organization whereas a deleted person would have to be added again if they return.

There are several reasons to delete or completely remove a member. Failure to pay annual dues is the primary one for clubs not wanting to maintain inactive data files but death and failure to leave forwarding address are two others.

To remove a single member chose the edit a member menu option. In the 'Membership Edit Screen' select the 'Delete' button. **Membership Director** will ask you which remove function you want to use.

Transfer Member

Members may be transferred from the active file to the inactive file, 'Former members' by editing the member and clicking on the delete button. The purpose is to save their data should they decide to rejoin the club at a later date or to provide the information to a later request (See Reactivate former members to active files).

When the Delete button is depressed there are three options.

- Transfer the person. Deletes them from active file and places the data in the inactive file.
- Delete the person. This removes them completely. It does not place any information in the inactive file.
- Do Nothing

Purging Membership

To transfer all members, who have failed to pay their dues by certain date, out of the active data files to the inactive (former) datafile, select the menu option 'Purge Members' on the Members menu. **Membership Director** will ask you to enter a date. All members with expiration dates prior to this date will be moved to the inactive data file. You may want to run a report 'Dues Renewal List Expires Before Date' to see a list of those who will be transferred to the inactive file before actually purging the membership.

Membership Director will report how may were removed and offer you an opportunity to review (print list) before the actual removal.

Duplicate Members

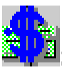
Occasionally information is entered about a member more than once. To remove duplicate members

- Select 'Members' menu from the menu bar.
- Select 'Check for Duplicates Members' menu option
- After checking, **Membership Director** will display a list of possible duplicates.
- Print the list.
- Edit each member and examine the recorded details to see if they are duplicates. If they are select one to edit and delete.

Barcode Reader

Use of a barcode reader can facilitate locating members in the Membership Information and Dues Paying screens. Move the cursor to the 'Member No.' entry field and then, using a barcode reader, swipe the barcode on the member's membership card. The member's member number is automatically entered and the member's name is highlighted.

Dues Payment Received

Select this button on the tool bar to record payment of dues OR select the 'Receive Dues Payments' menu option from the Finances menu

Locate the member paying dues using the Find Member screen. Once the member has been found click the 'New' button to begin recording the new dues payment. The member's current status is displayed at the bottom of the screen. Enter the date received, amount received, check number, type of membership being paid for, and the new expiration date and click the 'Save' push button.

Membership Director automatically adjusts the expiration date. It uses the member's current expiration date, the number of periods being paid for and the period a particular member type is valid for. Example: if the type of membership is valid for a month the member’s expiration is extended one month from the last expiration period if one period is being paid or three months if three periods are being paid.

Edit Dues

- Select 'Receive Dues Payment' from Finances menu
- Locate the member
- Click the 'Edit' button
- Select the specific dues payment in the lower grid
- Select the 'Dues Payment' tab at the top of the page
- Make the necessary changes and click the 'Save' button

Dues Renewal Notice

There are two dues renewal notices. One is for individual members. The second is for organizations that are responsible for paying the individual members dues. On the Organizations page of the Member Information

Screen is an item 'Bill Organization for Dues'. If this is checked then the second dues renewal notice should be used.

Dues Notice (individual)

A notice is usually sent to members reminding them that their dues will soon expire.

- Select Dues menu option from the Reports Menu.
- Select Dues Renewal Notice
- Select Individual Members.
- Enter expiration date - a notice is printed for all members with memberships expiring prior to this date.
- The bottom portion of the Dues Renewal Notice is returned along with the dues payment. This provides the member an opportunity to update their personal information - address, telephone, etc at the same time they renew.

Dues Notice (Organization)

- Select Reports menu
- Select Dues menu option
- Select Dues Renewal Notice
- Last select Dues Notice to Organizations.

Print list of expiring membership

There are two lists available. One is a list with memberships expiring before a given date and the second for those expiring after a given date.

- Select 'Dues' from the Reports Menu.
- Select the desired list menu option.
- Enter expiration date
- When an asterisk appears before the member's name then the dues is paid by the Organization this member represents.

List of Organization with expiring membership

- Select Reports menu
- Select Dues menu option
- Select Organization Paying Dues for Members menu option

Labels

- Select 'Dues' from the Label Menu.
- Labels are not essential as the Dues Renewal Notice can be folded and placed in an envelope with window so the address will show through

the window.

Dues Payment History

- The Dues Payment History which is located on the bottom of the Dues Payment screen is a quick way to view all the dues payments made by a member.
- To editing the dues payment select the person then click the 'Edit' button and then click the specific dues payment in the lower Dues Payment History display.
- To delete a dues payment is similar to the editing process just described. When a dues payment is deleted you have the option to delete it at the same time from the checkbook.
- A Dues Payment History report is available.
- The Membership Information Screen (membership page) also shows the members dues paying history.

Other Features

Attendance

Membership Director can maintain an attendance record for each member.

- Select 'Other' menu from menu bar and then select 'Record Attendance' menu option or select the  image from the tool bar.
- Enter date of meeting and purpose
- Determine how you want to record attendance **-** by name or member number. If you desire to record attendance by member number click the radio button for 'Record Attendance by Member Number'. This places the cursor where the number can be entered. It can be entered by typing the member number or by using a barcode reader to scan membership cards. Once the number is entered click 'Save & Next'.

If you choose to record Attendance by Member name highlight ‘This Meeting’ for the first member and use the space bar to place a check in the box and then the down arrow on the keyboard to position to the next member, repeating the space bar if they attended or the down arrow to the next member. Attendance can be facilitated by the use of the Attendance Sign In sheet (see reports). After checking last member click the 'Save' button.

Edit Attendance

- Select 'Attendance' from ‘Other’ menu then Select 'Edit Attendance' menu option.
- Identify the meeting date.
- Locate member to be edited.
- Remove the check beside the member name, if attendance was recorded in error, or place a check there if attended and not recorded previously.
- Click 'Record Changes' button

Email

To enable the email capability of **Membership Director** you must supply, in Configuration, the SMTP server, the password and user id that your SMTP server will recognize. Your ISP may have provided you this in setting up the email and Internet on your computer.

Be sure to record the member's email address in their record using the

Member Information Screen. Use the Email Center  image on the tool bar to identify one or more email recipients and then select the appropriate button - simple message or message with attachment.

For the simple email just enter

- Subject
- Message - type or paste the message
- Click the 'Send' button

Email with attachment

- Subject
- Message - type or paste the message
- Click the 'Get Attachment and Send' button
- Locate the file that will be attached
- Click the 'Open' button

Awards

Membership Director maintains the history of awards given by the club. This module allows entry of the justification for the award and general information.

- First select the  image from the tool bar
- Locate the member by entering the first couple characters of the member's last name.
- Click the 'Award Justification' tab located at the top of the screen.
- Click the ‘New’ button
- Enter the award date, title and justification information.
- Click the ‘Save’ button

Committee Assignments

First create the committee codes.

- Select the 'Configuration' menu.
- Select the 'Lookup Codes' menu option.
- Select the 'Committees' menu option.
- In the Committee Codes screen create your codes. Committee codes are three characters that Membership Director will use when you assign members to committees.

Examples of Committees are:

MEM – Membership FIN – Finance PUB - Publications

Assign committees to members

- Select the 'Members' menu from menu bar.
- Select 'Committee Assignments' menu option.
- Locate the member on 'Committee Assignment' screen.
- Click the 'New' button. Membership Director automatically moves the cursor to the 'Pick the Date Assigned' field and enters the date when the member was assigned to the committee.
- Tab to the 'Pick the Committee to Assign' list. Select the desired committee from drop down list and Membership Director will automatically move the cursor to the Save button. Hit the Enter key on the keyboard and the committee will be saved and the cursor set on the 'New' button to repeat the sequence. The selected committee will appear in the Assigned Committees grid.

Editing (removing) committees

- Locate the desired member
- Highlight the committee to be removed.
- Click the Delete button.

Assign Office/Positions to Members

On the Membership Information page of the Member Information Screen the current officers can be designated. A report is available to list the current officers.

Assign Interest codes to Member

Conducting a survey to identify your member's interests can help you to identify programs, assign what committee to assign them, utilize their expertise, or many other ways that help your organization. **Membership Director** can maintain this information for you.

First create the interest codes.

- Select the 'Configuration' menu.
- Select the 'Lookup Codes' menu option.
- Select the 'Interests' menu option.
- In the Interest Codes screen create your codes. Interest codes are three characters long. Examples of Interests are:

Computer Club: PRO - programming; INT - Internet; WEB – web page development
Trail Club: ND - North District; TM - trail maintenance; CC - cross

country
Garden Club: PER - perennials; WAT - water plants; ROS – roses

Assign codes to members

- Select the 'Members' menu from menu bar.
- Select 'Member Interests' menu option.
- Locate the member on 'Interests Assignment' screen.
- Click the 'New' button. **Membership Director** automatically moves the cursor to the ‘Pick the Interest to assign’ list.
- Select the desired interest code from drop down list and **Membership Director** will automatically move the cursor to the ‘Save’ button.
- Hit the Enter key on the keyboard and the interest will be saved and the cursor set on the ‘New’ button to repeat the sequence. The selected interest will appear in the Currently Assigned Interests grid.

Editing or removing interest codes

- Locate the desired member
- Highlight the code to be removed.
- Click the Delete button.

Former Members

Transferring them from the active files to the inactive files may retain information about former members. This allows their information to be recalled if someone needs it or to allow the person to be reactivated should they, at some later time, rejoin the organization.

Reactivate Former Members to Active Files

Select the 'Browse Former Members' menu option on the 'Members' menu. Finding the former member is similar to that of finding a member. Click the 'Edit' button to display the former member's information. When the information is displayed, and it is the right person, click the 'Reactivate' push button.

Browse Former Members

Select the 'Browse Former Member' menu option off the 'Member' menu. Use the 'Find Former Member' screen to locate the former member.

You may:

Reactivate - restore to active files if rejoins the association
Delete - from the inactive file

See Details **-** view the data for the former member. Note: the data can not be changed

Purge Former Members

Select the 'Purge Former Members' menu option off the 'Member' menu. All former members, who have been in the inactive file longer than the date you specify here, will be removed. They will no longer exist in any datafile. **Membership Director** will report how many were removed.

Financial Management

Membership Director provides a financial module that allows the association the means to track the association's income and expenses. It can be used to record the checks issued, but will not print the actual check. It also records funds received in addition to dues and contributions, i.e. grants, rebates, interest, etc. The various income/expense reports provide a financial picture of the association's finances.

Checks and Deposit Screen

This screen is composed of two pages. The tabs at the top of the screen may select these pages.

Checks Page

The Checks page resembles a check, which most people are familiar with.

- Payee. Membership Director allows quick access to a payee list of persons or businesses that the association has previously written checks to.
- Account - The list contains the accounts created in for the association. If the account list is not satisfactory use the 'Configuration' menu, 'Lookup Codes' and 'Accounts, Financial' menu options.

Deposits Page

Do not use this page to record dues received or contributions. Doing so would duplicate any dues or contributions recorded using the menu/tool bar options for these two functions. Use this page to record any other income that is received - bank interest, grants, sales, refunds/rebates, etc.

Editing using the Checkbook Register

Once in the checkbook register highlight the item to be edited and click the 'Edit' button. Either Tab to or use the mouse to select the item to correct. If the amount is changed you will need to use the 'Recalculate the Balances' button. To delete a check highlight the check and then click the 'Delete' button.

Opening Checkbook Balance

If the opening balance was not entered in the Setup Wizard it may be inserted by:

- Select the 'Configuration' Menu from menu bar
- Select the 'Organization' menu option

- Click the ‘Edit’ button
- Enter the amount in Checking Account Opening Balance. This only done once. Once done this entry may not be accessed by the user.

Deposit Slip

- The ‘Deposit Slip’ menu is found on the ‘Finances’ menu
- Printing the deposit slip can facilitate making the deposit slip needed by the bank
- A bank deposit slip can be created to record all income received over given period
- The deposit slip includes the check numbers and amounts

Review Financial Transactions by Accounts

Membership Director provides an easy way to examine the financial transactions.

- Select the ‘Finances’ menu
- Select ‘Financial Transactions’ menu option
- Enter the beginning and ending dates (leave blank to review all)
- Select the account to be reviewed
- Either click the ‘Transaction’ tab or the ‘Review Transactions’ button.

You can only review data. No Editing can be undertaken.

Financial Reports

- Annual Income/Expense
- Income/Expense Summary for given period
- Income/Expense Compared with previous year (period)
- Account Summary – 1 account
- Account Summary – All Accounts
- Checkbook Register
- Payee Payments – help in preparation of 1099 form.

Contributions Received

Contributions may be received from both members of the organization and non-members.

Member Contributions

- Select 'Contributions' from the Finances menu, then Members, or Select the Contributions icon from the tool bar
- Click 'New' button.
- Enter data regarding the contribution received
- Select type of contributions from drop down list
- If cash, enter amount
- If non-cash contribution enter a description of the non-cash item and assign a value.

Contribution received from non-member

- Select 'Contributions' from the Finances menu
- Select 'Non-Member' menu option
- If the donor is not already in the donor data files, select the 'New Donor' button. Enter the details about the donor and the donation.
- If the donor has contributed previously, enter their last name to locate them, and then click the 'New Donation' button. Change any information - address, etc and enter the details of the new contribution.

Problem entering amount

If the amount field will not accept an amount use the HOME key to move the cursor to the left in that field. An alternative is to use the TAB key to move from field to field as this places the cursor all the way to the far left.

Edit Contributions

- Select 'Contributions' from Finances menu
- Select either the 'Member' or 'Non-Member' menu option
- Locate the donor
- Click the 'Edit' button
- Select the specific contribution in the lower grid
- Select the 'Contribution' tab at the top of the page
- Make the necessary changes and click the 'Save' button

Reports

There are over ninety pre-established reports for your use. These are selected from the Reports menu. In addition there is a Custom Reports and Letters option that together allows the user to have great access to the membership data.

Previewing the Report

The preview toolbar is located at the bottom of each report and label screen. You can print the report or labels by clicking on the printer icon. The options (left to right) are:

Start Page - End Page:	Print selected pages
Copies:	Indicate the number of copied desired to be printed.
Collate:	Only available if your printer has this capability.
Save:	You may save the report as a HTML file.
Print:	Print the report being previewed.
View:	Change the page being viewed.
Redisplay Report:	Refreshes the report.
First page:	Changes view to first page of report.
Previous page:	Changes view to previous page of report.
Next page:	Changes view to next page of report.
Last page:	This button changes view to last page.
Close:	Terminates report preview.

Letters, Merging Data

Membership Director allows the user to create letters in which data from the data files is merged into the letter. First,

- Select the Reports Menu
- Select the ‘Custom Reports & Letters’ menu option. This brings up the screen below:

Create Letters

- First click on the 'Select Data Table' button and select the data file you want to use.

Most of the time the data file to select is 'MEMBERS.DBF'. This file holds most of the member information. Other files for possible use include:

Dues_pay.dbf -	holds dues information
Contrib.dbf -	holds contribution information of members
Contbnm.dbf -	holds contribution information of non-members
Award.dbf -	holds award information
Comm_me.dbf -	holds committee information
Int_memb.dbf -	holds interest information.

Note: A special field links 'members.dbf' file and these six data files.

- Select the 'Select Text File' button, if a letter has previously been prepared, and locate it.
- If no letter has previously been prepared select the 'Create New Text File' button and then type in a descriptive file name
- Select a Font by clicking 'Change Font' button. The font selected will appear as <FT-xxxxx,12,xxx>. See example above.
- Use the Enter key to increase the space at the top for your letterhead or desired beginning point on the page.
- Type in the letter. Where you want a data field to be merged, select a field from the 'Insert Field' drop down list by double clicking on the field. The field can be identified in the text by the <FN-xxxxx> where xxxx is the field name. Use the Enter key to establish the right margin (there is no wrap). You may want to print a letter to view the margins and then reset them accordingly.

- Click the Save File button

Printing Letters

- Select the "Merge Letters' as above if not already open
- Select the 'Select Text File' button and locate the file
- Click the 'Print' button

Select – Letter or Reports

Select the format for the report either letter or report. Selecting the 'Report' radio button makes a list report with data in columns. Just select the fields for the report as above and print the same way.

Printer Setup

This is a standard window feature - change printers, change orientation, paper size and tray. This is found on the 'File' menu.

Disbursing a report to other members

There are two ways to save printed reports:

1. Use the Save button on the Preview to save as a HTML file. Some browser do not align columns correctly and thus not always the best method.
2. A better method is to use a PDF writer. Download and install them as a printer driver on your computer. One of these is PDF995. To create the PDF file select the PDF995 printer when you print the report.

In either option provide a name in the dialog box when it asks for the file name. Attach the newly created file to email messages or place on a floppy disk.

Labels

- The membership type and expiration date may be printed on the first line of the label if ‘Print Expiration and Membership Type on label’ option was selected in Configuration.
- Spouse names will be included in the name line of the address label if you have answered 'Yes' in the Basic Organization Configuration to the question 'Print member and spouse name on address labels?'
- You can print envelopes in lieu of address labels if you have answered 'Yes' in the Basic Organization Configuration to the question 'Print

envelopes in lieu of address labels?'

- If you don't want the country code to be displayed on address labels - leave the country code blank on the Membership Information Screen.
- A member may have two different addresses. Indicate on the Membership Information Screen which one is the one to be used in printing labels.
- You may select the labels to be printed either alphabetical or zip code.

Label options

There are 19 pre-established labels.

1 All Members
2 Selected Members
3 Members in Single City
4 Members in Single State
5 Members in Single Country
6 Dues - All before given expiration date
7 Dues – All after given expiration date
8 Dues - All within given period
9 Former Members
10 Membership Types - for specific type
11 Officer/committee - for specific committee
12 Interest - for specific interest
13 Contributors - All
14 Contributors - All within given period
15 Chapters - single chapter
16 Special Flag - all members having the special flag
17 Organizations Represented
18 Organizations Represented - with names
19 Name Tags

Labels Supported

Membership Director supports 3 of the common Avery Address Labels. You can change the Avery Label type by changing the association's label default established in Configuration Menu.

The three Avery label types are:

Avery No.	Size	Labels Across	Labels Down
5160	2 5/8 x 1	3	10
5161	4 x 1	2	10
5162	4 x 1 1/3	2	7

Name Tags

Printed on Avery 8395 Name Badges - All members printed alphabetically

A club logo will be printed on the name tag.

Membership Cards

- Use Avery business card stock - for laser printers, 2 across x 5 down, 3.5" x 2.0" - Avery 5371 (white) 5377 (gray) and 5376 (ivory).
- Print all or individually
- All with Special Flag setting (one letter designation)
- The club's logo will be printed on the card.

Meeting Notices

- Use Avery #3262 card stock - 2 across, 2 down, printed landscape
- Enter the date, time, location, and program
- Then print the meeting notice to all or select members

File Management

Selecting the 'File' option on the menu bar will display four file management menu options.

Indexes

Indexes maintain the order of the data. Should you observe the data on reports or in data input screens not appearing to follow the established order, i.e. names out of order, codes not in proper sequence, unknown data being displayed, then it is possible that the indexes have become corrupt. Data and index files become corrupt by sudden power fluctuations or loss of power at critical times or turning off the computer without closing it down properly.

There are two possible solutions. Either reindex the data files or restore them from backup. The first choice is to reindex. If this doesn't correct the problem then restore valid files from your backup.

Re-indexing Data files

- Select 'Indexes' from File Menu
- Select 'Rebuild Indexes' menu option
- All indexes will be rebuilt

Remove Deleted Records

When records are deleted they are not actually removed, only marked for deletion. Sometimes this may cause some report to display counts more than they are. Selecting the 'Remove Deleted Records' menu option will 'pack' the data files.

Backup Data files

It is highly recommended that you backup up the data files on a regular basis - at end of each session, daily, or, as a minimum, weekly.

The Backup Data Files option copies the data files to 3 files on your hard drive and, if selected, also to your default drive. The names of the three files are MDBack1.PAK, MDBack2.PAK and MDBack3.PAK.

To backup:

- Select 'Backup Data files' option from File Menu
- Select the 'Yes' radiobutton if you want to backup up to both your hard drive and your default drive. The default drive is the drive you designated in

the Configuration setup. Note this can include the hard drive or Zip Drives. Insert the disk and click 'Start Backup' button.

- Select the 'No' button, if you only desire to backup to the hard drive, and then the 'Start Backup' button.

When backing up to a floppy disk **Membership Director** will alert you if a disk is full. When this occurs remove the disk and label it and insert another disk. Continue this if prompted. Place disks in safe storage place should restore data files become necessary.

NOTE: Larger organizations will need to backup to Zip Drives as the files may not fit on 3.5 inch floppies. If the data files will not fit an error message will be received. Backup is not possible to CD ROM RW drives.

You can choose to backup manually using Window Explorer or My Computer. If you do, copy all ".dbf, .dbt and .mdx" files to your backup disk.

Restore Data files

If rebuilding the indexes has not corrected the problem of corrupted data then the only remaining solution is to restore valid data from your backup files.

- Select 'Restore Data files' from File Menu
- Click on the wrench to the right of Get Backup File and select one of the three *.PAK files. All the *.PAK files are located in the \Tables folder (C:\MEMB_DIR\TABLES). Once selected a list of files will be displayed. MDBack1.PAK contains all lookup codes. MDBack2.PAK contains all files containing member data (dues, awards, contributions, interests and committees plus financial data). MDBack3.PAK contains the individual membership data. See next page for a listing of files in each .PAK file.
- You can 1) restore all files in all PAK files, 2) restore all files in one PAK file or 3) restore a single file from a single PAK file.
- If corruption is only noticed in one file select the appropriate file, then click Restore One File. Select Restore All to replace all listed files. If the backup files are not up to date significant data entry may be needed to bring the restored files up-to-date. This is the primary reason to backup data on regular basis.
- If you are transferring files to another officer’s computer select restore 'All Files From All PAK Files'.
- When you restore data from your backup files it gives the old file a .BAK extension.

Backing up on one computer and restoring to a second computer

The 'Default' drive always means where the backup disk will reside. Normally this is 'A' drive but could be any external or removable drive. The backup will always write to the hard drive but you normally want it to write to both the hard drive and the removable disk drive.

So after backing up to the floppy on the first computer take that floppy to the second computer. On the second computer you need to use the Restore Datafiles procedure to copy the data from the floppy/removable disk to the second computer's hard drive. Be sure you must select the floppy/removable drive so the .PAK files from the floppy/removable disk are displayed. If you select C: (the hard drive) then the data you restore is not the new data from the floppy/removable disk, that is the data from the first computer, but the data you backed up previously on this, the second computer.

Caution: Using the Restore Datafiles option completely overwrites the datafiles on the hard drive of the second computer. After restoring the data on the second computer will be a duplicate of the files on the first computer. The backup from the first computer will have replaced any work done on the second computer data files.

Different Officers Using Different Parts of Membership Director

When the responsibilities for membership and treasurers are split between more than one officer the backup of data files and restore of data files must be carefully managed as cautioned above.

The backup creates three .pak files. These are compressed and each contains up to a dozen datafiles (.dbf and .dbt files) that Membership Director uses to store the data.

MDBack1.pak contains the lookup codes - account.dbf, award.dbf, chapcode.dbf, config.dbf, contcod.dbf, country.dbf, err_log.dbf, former.dbf, history.dbf, int_code.dbf, mtg_date.dbf, off_code.dbf, officer.dbf, event.dbf, commcode.dbf, state.dbf, typememb.dbf, user_def.dbf. The only one with financial info is account.dbf.

MDBack2.pak contains attend.dbf, awrd_mem.dbf, check.dbf, chk_no.dbf, contrib.dbf, contbnm.dbf, dues_pay.dbf, awrd_mem.dbt, int_memb.dbf, off_memb.dbf, payee.dbf. Four of these files include the financial data - check.dbf, chk_no.dbf, contrib.dbf and dues_pay.dbf. The others include data of the member's involvement in your organization.

MDBack3.pak contains members.dbf and members.dbt. This file contains the member information.

So if you backup and do a selective restore - only restoring the data used by each other. It can work but you always need to restore one file at a time, a little time consuming.

A separate license will be required for each computer running the program.

Transfer to new officer

Periodically the need exists to transfer membership responsibilities to a new officer. Here are the recommended steps to take in making this transfer.

- The old officer should make a backup of all data files (use 'Backup Data files' in File Menu) OR copy all files with extensions of .dbf, .dbt and .mdx to transfer disk.
- The New officer should download the latest version from Advanced Data Solutions' web site (www.ads-software.com/download.htm) **- but DON'T INSTALL*.**
- The New officer should create two new folders on his/her computer – first C:\MEMB_DIR. Then the second one within the first – C:\MEMB_DIR\TABLES. Copy the data files from transfer/backup disk received from the old officer into this, the tables folder. NOTE: the data files include files with extension of .dbf, .dbt and .mdx
- Now the new officer should open and install the downloaded file. This places all the new files into the c:\memb_dir folder. Run **Membership Director**. It will recognize the data from the earlier version and ask if it is to be retained. Answer 'Yes' and, after it moves the data from the old datafiles into the new datafiles and then will reindex them and then you are ready to go.
- Record the Registration key received from Advanced Data Solutions. Otherwise you will not be able to enter any new members because without the registration key Membership Director assumes it is a demo.

* It is possible that a new version will have new data fields. Therefore don't use the Restore Data files menu option to transfer the data files. This copies the old or backup data on top of the existing data files thus wiping out the new data file format. Placing the old data files in the c:\memb_dir\tables folder first allows Membership Director, when it is run, to identify that old data exists and give the user the option to retain the old data or start with blank data files.

Sharing Data

A frequent question we receive is 'how can the data be shared with other officers of the club?'

1. If the other officers have a need to add information, edit information and run reports at the same time then you need to be networked. Each machine would need a software license. We offer volume discounts depending on the number needed.

2. If the other officers only need access to various reports you can save the reports as HTML files or obtain a PDF writer program and install it on your computer. The PDF writer places a printer driver on your machine. When you print a report you select this printer driver to print. It actually creates a .pdf file, which you then give to your officers. A free PDF writer is PDF995. There are others. You can find them through a Google search.

3. Those users with Microsoft Access or Excel, or similar programs, can open a copy of the main datafile(s) in these programs. All the **Membership Director** data is stored in .dbf files. Access and Excel can open and work with these files. But notice we said 'a copy'. We do not recommend using these programs to work directly with the actual datafile. There is a fair chance the datafile could become corrupted and then you couldn't use it with **Membership Director**. Also note that the data **Membership Director** maintains is found in multiple data files. These data files are linked within MD. Other programs will not provide this linking so you may not get the results you desire.

4. You can use the Update Master option. See 'Update Master'.

Security

A userID and password are required to activate **Membership Director**. These establish a security level for the user.

Security Levels

1 The lowest level. A user with this security level can enter individual membership information, individual contributions and other data entry. They cannot:

- Write or Edit Checks
- Change passwords
- Create new users

2 This level can write checks. They however cannot:

- Change passwords
- Change security levels
- Can not create new users

3 The highest level. A user with this security level can:

- Create new users
- Change Passwords
- Change security levels

Changing Security Levels

- Select Configuration menu
- Select 'Change Security' menu option
- If you have a level 3 security then the Change Password screen is displayed. This screen functions as any other lookup code.

LogOn as New User

While **Membership Director** is running you can switch from one user to another thus changing the security level. Select the File Menu and 'LogOn as New User' then enter the new password and you are now logged on with the new security level.

History

Membership Director allows you to maintain a history of your association.

- Select the Other Menu
- Select Organization's History menu option
- Enter your officers, no. of members and major accomplishments

Troubleshooting/Problem Solving

Error following installation

If **Membership Director** is installed in a folder with space in folder name the user will get the following error upon starting the program and entering the User ID and password.

Module: Mem_DirApp:
Line: 1476
Error no. 97
Error message: Unallowed phrase or keyword.

Solution: Uninstall the program from Control Panel and reinstall to the default location **-** C:\Memb_Dir folder.

Database Engine Error - Invalid Index Descriptor

Database Engine Error - Unsupported Capability

Both of these errors have been reported after installation and when running **Membership Director** for the first time. **Membership Director** will appear to be caught in a loop, giving the same error but different line numbers. To Exit from the loop use Task Manager/Close Program (CTRL + ALT + DEL keys on your keyboard) to End Task for the Error Message. Something is not compatible in your computer's BIOS with the database engine that we use. Upgrade the BIOS by downloading a file from the computer's manufacturer website and then restarting the Membership Director. Be sure to follow the BIOS installation instructions.

Corrupted Data

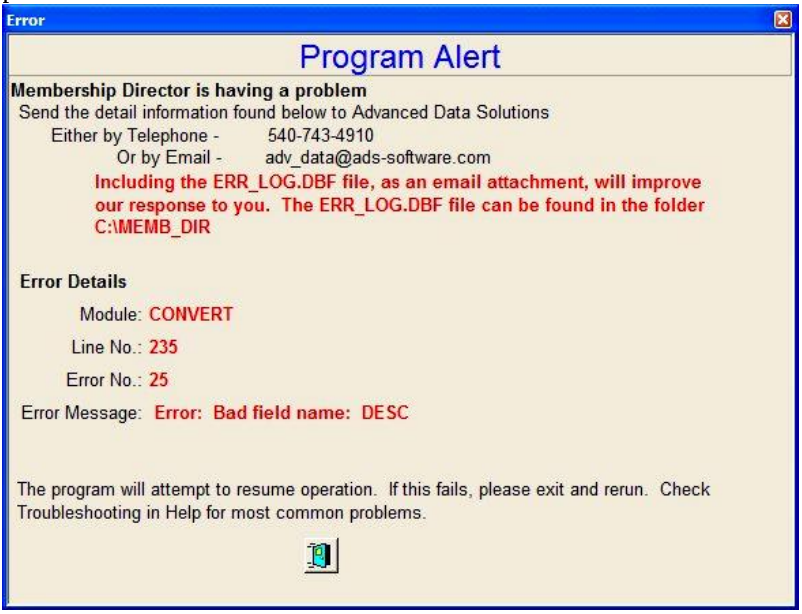
- Re index data files **-** see Indexing
- Restore from backup files **-** See Restore Data files

File in use by another

This error may be received usually after an error. The error leaves a data file open. The operating system then sees it as being in use. The only solution is to reboot the machine to clear the mistaken impression that the file is in use on network by another user.

Program Error

We have tried to provide you with a quality program. Occasionally a bug creeps in. When the Program Alert screen (see Next Page) is displayed, **Membership Director** has detected a problem.   Record the ‘Error Details’. Close the Program Alert screen. If the program continues satisfactorily you shouldn't do anything further. If you get immediately subsequent messages use Task Manager or Close Program (press CTRL + ALT + DEL keys to activate) and select ‘End Task’ on the error message. Then repeat what you were doing. If this problem occurs again forward the ‘Error Details’ from the screen or the ERR_LOG.DBF file to us.. The ERR_LOG.DBF file is found in the c:\memb_dir folder. It contains the error detail information on this screen and is helpful in isolating your problem.



Customize the 10 customizable fields

From the Configuration Menu select 'User Defined Info' option. The Organization Specific Information screen allows you 10 fields to collect specific information the organization wants collected that aren’t already collected by **Membership Director**. For each field you must enter the Screen Label (how it will appear on the screen). Save and then, when in the Membership Information screen, select the 'User Custom' tab to access the user-defined fields. They will be displayed with the label you just created. The label informs the user what information to enter for each member.

Unable to create control
Your computer has run out of resources (system or user resources). Close down any unneeded programs or reboot. Rebooting the computer is the best as it frees up any resources not released by other programs.

Error: Class does not exist: MAINMENU::MENUXX_ONCLICK
This error will occur following another error that causes the menu to be closed unexpectedly. Close **Membership Director** and restarting it will clear this error.

Unable to print labels
First be sure that you have a label type selected in Configuration. This is the most common problem. Membership Director must have a label type to print a label. Second be sure you have one of the 'Use this for Mailing' checked for each person.

Installation & Download Problems

- Firewalls often prevent downloads of .exe files. Disable the firewall temporarily and try again.
- Some popup stoppers program can interfere with installation examples include Pop Up Stopper and AdSubtract. Disable them and try again.

Import Data Errors
Selecting the wrong field may result in the following error:

> Unexpected Error
> Data Error: Unknown or wrong data

Data displayed incorrectly after import

Telephone numbers are stored as numbers only with no formatting. If you import the telephone number as (555)121-1212 then they will be displayed later as ((55)5)1-21-1 so before you import change the telephone data to numbers only i.e., 5551211212 with no formatting.

Code 110 error while indexing

This error is also caused by a previous error that locks a file so the indexing cannot be completed. Exit from **Membership Director** and restart.

Database Engine Error: Read failure: \resttemp.DBF

- Download and install the most recent build

Memory Access Violation

This error occurs occasionally when the operating system and program try to use the same memory location. The program adjusts, and in this case prints the report, but the operating system still puts up the 'memory access violation' message. If it is repeated it may be a sign that your memory is being fully used. If so then close the program and try again. Closing the program tells the operating system to free up the memory it is using.

Vistas - use Windows XP SP2 compatibility mode

Vista has 'Windows XP SP2 compatibility mode'. This mode is created to prevent the "This program might not have installed correctly" dialog box that shows for applications that are hard coded to look for the XP version.

Set the 'Windows XP SP2 compatibility mode' by:

> Right-click on an .exe name or shortcut – go to Properties - under the Compatibility tab - apply the Windows XP SP2 compatibility mode to allow the application to work as it did on Windows XP.

Import Data

Importing information about your members (name, address, telephone numbers, last dues payment, etc) can be accomplished using the File menu and Import menu option. However data such as dues paying history, contributions history and other similar data cannot be assimilated into the existing data structure.

Importing data from another source is a several-step process. The Import Data form will attempt to lead you through this process based on the type of data you are importing FROM, and the table you are importing TO. The data source file will be called the "Source" and the table you are importing the data into will be called the "Target" throughout the process. You may have several choices as the process continues, and you may cancel at any time.

Step One - Select the Data Source

There are five types of data sources that you may use.

- CSV - Comma Separated Values
- Separated by other character
- DBF - dBase format

Comma Separated Values (CSV) - The data may have quotes around text fields, and a separator between all field types that is not a comma. This is in a text file that can be opened in any text editor. Select separator from list (below) or enter separator (single character). A CSV file may have a file extension of .TXT, .CSV or just about anything.

Separated by other character - The data may have quotes around text fields, and comma separators between all field types. This is in a text file that can be opened in any text editor.

Step Two - Provide name and location of Data Source

Click the button to the right of the entryfield. In the following dialog box locate the folder and source file to be used.

Step Three - Identify target file

Most of the data to be imported will have 'MEMBERS.DBF' as the target file. This file resides in the "C:\MEMB_DIR\TABLES" folder (default location). It is not recommended to import data into any of the other data tables, as it is unlikely the structure of the old source file would match that of the current tables.

Step Four - Map the Destination file to the Imported file

This step matches the Target fields to those in the Source file. Each field must have either a field name or 'Ignore'. Data from the first three records are displayed so you can see what field to assign. If not sure choose 'Ignore' which is the last item on the field lists. Selecting the wrong field may result in the following error:

> Unexpected Error
> Data Error: Unknown or wrong data

At this point you need, for each field in the "Source Field" list shown, to assign a field name, a field type, a width, and if the field type is numeric, a number of decimal places. To do this follow these steps for each field

1. Select a field in the list, in the order you want it to appear in the new table. (The contents of that field from the first rows will appear

in the list below the first one.)
2. Enter field name, select type, select width, and select decimals. NOTE: if you do not wish to import a field, select "Ignore" in the fieldname option. For each field there must be a field name or the word 'Ignore'.
3. Click the "Add Field" button
4. Repeat for each field

Export Data

Step One - Select the fields to export

- All fields - by selecting the 'Select All Fields' button.
- Drag desired field from column to the white square in the lower half of the screen. Or Double-click the desired field.
- If a field was moved in error, double click it

Step Two -Click the Export Tab and then select the export option desired. Options included are:

- Comma Separated Value
- Other Separator – must designate the separator
- SDF (Standard Data Format)
- HTML
- DBF

Step Three – Give the export file a name

Using Different Languages

Membership Director can allow you to use a language that has different characters like 'çéã' in it.

Open the Character Map that you will find in the Windows Accessories Menu. Click on the desired character you want and then click the copy button. Then in **Membership Director** at the spot where you want the character use the CTRL + V keys and it is pasted in. All of the keys listed above and more are available to be used.

These characters, however, may not print unless the printer can access the international character set.

Updating Master Files

Associations may have a national office and chapters with the need to maintain membership information at both levels. At the national office the need is to have consolidated data from all chapters. At the chapter the need is to only have chapter data. The chapter must submit their membership data to the national office where the national office assimilates it into the national data file.

The chapter first purges their membership to remove those who are no longer members. This creates a data file of the removed members. It and the current membership data files are transferred by diskette or email to the national office. At the national office the removed data file is used to remove those who are no longer members from the consolidated data files. The current data file chapter is used to check against the existing data file for any changes or new members.

NOTE: Updating a master file only transfers general information from the chapter's member - name, address, telephone, etc. The latest dues payment, date of expiration and current membership category are transferred but the member's dues history, contribution history, organization history, attendance, lookup codes are not forwarded.

The update process for Chapters

Preparing to send data

- Select 'Member' menu
- Select 'Purge Member' **-** All expired persons as of a given date are transferred to inactive files AND a file is created containing the removed persons (removed.dbf).

Sending data to primary unit (HQ, National, International)

- Select 'File' menu
- Select 'Update Master' menu option
- Place blank disk in default drive (One you established in Configuration)
- Select 'Send Files' menu option
- Label disk with appropriate information and send.
- An alternative is to send files via email. Attach two files to email message
  1. Members.dbf
  2. Removed.dbf

The update process for National Offices - *Updating master data*

file using sub-unit (chapter, club) data

- Copy files received via email to special folder (C:\MEMB_DIR\TEMP). Normally there will be two files (members.dbf, removed.dbf).
- If you have received multiple updates you must give each a new unique name when other files are already there. Call the second ones copied there - members1.dbf and removed1.dbf, the third members2.dbf and removed2.dbf, etc.
- Or place the data received from the chapters on floppy disk in your floppy disk drive
- Select 'File' Menu
- Select 'Update Master' menu option of File menu
- Select 'Update Master' menu option of Update Master menu
- **Membership Director** will ask for the location of the data - either the default floppy disk drive or a special folder (C:\MEMB_DIR\TEMP)
- After updating **Membership Director** will indicate how many members were added, changed or deleted. All files on the floppy disk or in the special folder are then moved to the folder C:\MEMB_DIR\UPDATED leaving the folder (C:\MEMB_DIR\TEMP) empty.

Updating Membership Director

- Determine what version you are currently running by selecting the 'About Membership Director' in the Help menu. The version and the build date can be found here.
- Registered users may obtain the latest release to their version free by downloading the demo program from
  www.ads-software.com/download.htm.
  Your registration key will convert the demo to the full program.
- Download the latest file.
- Open the downloaded file and the files will be uncompressed and installed.
- Run **Membership Director.** It will recognize the existence of earlier data and ask the user if the earlier data is to be retained.
- You may have to re-enter the Registration Key furnished by Advanced Data Solutions

Uninstall Membership Director

- Remove the folder c:\memb_dir
- Delete any shortcuts

Networking

Membership Director is networkable. Follow the steps below to install it on your network.

- Install the program on all network machines
- Remove the data files (.dbf, .dbt and .mdx files) on all but the computer that will serve as the data server
- On all computers, other than the one acting as the data server, map the drive to the data server computer. Your Network Administrator will have to do this.
- Open the BDE Administrator. This is found in the Membership Director v.2.0 Menu group.
- Click the Database tab if it is not active
- From the list of databases click on MEM_DIR to highlight it.
- Select the Object menu
- Click on Delete to remove it
- Select the Object menu again
- Click on New
- Enter 'MEM_DIR' as the name in place of 'Standard'
- On the right 'Definition' side of the BDE Administrator with MEM_DIR highlighted change Default Driver from the default 'Paradox' by selecting 'Dbase' from the drop-down list.
- Also on the right side change the Path by using the Browse button (...) and point to the mapped drive and folder (should be' MEMB_DIR') oN the computer acting as the data server.

NOTE: An additional license is needed for each computer running **Membership Director** on a network.

Using with Window's Vista across a network

When launching this program across the network on another workstation or server you may get the 'Unknown Publisher' warning. At this time, the following option are available to suppress this warning:

In Internet Explorer from the Toolbar goto Tools | Internet Options. Under the 'Security' tab highlight the Local Intranet section. Click the 'Sites' button. Click 'Advanced' and add the server's address to the list of trusted zones.

Managing Multiple Organizations

Membership Director can only track information about one organization, however, you can install Membership Director two or more times on the same machine to track different organizations. Each installation should be to a different location. Do not install to any locations that contains a space in the folder name (i.e. "Program Files") OR the folder name longer than 8 characters. Each installation must have a unique shortcut in the Start menu and the computer desktop to it's own location.

Caution: Do not run more than one installation at the same time. Close out one before starting a subsequent organization or you may encounter data lost or transfer between the organizations. Also, when you upgrade to different builds you must do the upgrade to each installation.

Shareware

Shareware is a distribution system for computer software based on the "try-before-you-buy" principle. If you like the program, then you make a registration payment to the author. If you don't want the program after trying it out, then you delete it or pass it along to a friend.

Shareware is NOT freeware. To legally use a program that has been distributed as Shareware you MUST pay for it. Registration gives the user extra benefits such as the latest version on disk, technical support, upgrade discounts and enhanced program functionality

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Advanced Data Solutions

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Our website has the very latest release.

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License -Membership Director

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Index