Getting Started Guide for Membership Plus 2007

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Welcome to Membership Plus® Version 2007!

This best-selling church-management software is the easiest way to record complete, detailed member information for your congregation. Membership Plus® is fully customizable — to record the information you want to track and print your reports.

Features of Membership Plus 2007

Membership Plus 2007 has everything that you need in a single, powerful application. Some of its features include

- A **Membership Module** that stores complete membership information on an unlimited number of members names, multiple addresses, e-mail addresses, phone numbers, Social Security numbers, birthdays, photos, employers, and other personal data with customizable fields.
- A **Group Module** through which you can create an unlimited number of groups within your organization and record attendance.
- **NEW!** A **Small Group Module** through which you can create and manage small groups within your organization and record membership attendance.
- **Accounting Modules** based on fund-accounting. These new modules include a fully-functional General Ledger, account management, check printing, reconciliation, budgeting, and reporting. (Membership Plus Deluxe only.)
- An **advanced reporting** feature to help you target lagging attendance, write visitor follow-up letters, email reports, and provide a better experience to your members.
- **Microsoft Office Integration** for importing and exporting your data seamlessly from Outlook, Access, Excel, and PDF including reports, graphs and more. Microsoft Office products that offer **Smart Tags technology** can instantly access data from Membership Plus.
- A **Meetings Module** that makes it easy to record meetings, take attendance and capture member involvement within the Church. (I.E. Sunday School, Choir, Committees, etc.)

- The ability to for your to completely organize and manage your resources with the **Room and Equipment Module**.
- An **Equipment Inventory Module** that simplifies the task of keeping detailed information of all the Churches assets such as vans, audio/video, furniture, etc. Through this module, you can also keep track of equipment maintenance records.

Powerful Tools for your Growing Membership

With powerful tools like Visitation tracker, Microsoft Office integration, Workflow tracking, and an Event Registration module, Membership Plus 2007 provides everything you need to accomplish the level of growth you want. These tools include:

- A **Visitation Module** to track visitors and schedule follow-up appointments with them.
- **Integration with Microsoft Office** to help you keep in better contact with current members and visitors.
- A personalized letter creator and correspondence distribution system. With **Quick Letter**, you can develop personalized, customized letters with the option of printing them to mail or sending them through the bulk e-mail feature.
- A **Calendar Module** to keep track of important dates about your members (like birthdays or anniversaries) and Church events. A reminder feature ensures that you can always keep your Church informed and up-to-date about all events.
- An **Event Registration Module** that lets you plan and manage special events at your church. Through this module, you can produce special reports such as Invoices, Name Badges, Task and Attendee Lists.
- A **Workflow module** to help you accomplish key tasks (i.e., entering a new user, entering a new contribution) that usually involve multiple steps within Membership Plus. Through a Workflow Wizard, these steps are consolidated into a single new window for easy data entry.
- A **Survey module** through which you can create, deliver, and analyze surveys to gather information about your congregation. By utilizing Membership Plus to manage your surveys, you can develop a deeper, more meaningful understanding of your congregation’s needs.

- A **Progress Tracker module** through which you can set up goals for Membership Plus to track through a specific time frame, and then view the progress throughout.
- Use **Auto Tasks** to set up specific follow-up tasks to occur automatically in Membership Plus based on certain actions that happen in the program. Assign these tasks to specific users, with a specific due date, and each user can view his/her pending tasks right on the Welcome screen.
- Use a **check reader** (sold separately), to scan in checks during contribution data entry, which will speed up the entry time by doing an automatic lookup of a member and their most recent contribution, based on the bank account on the check.

Customizable Reporting

Although Membership Plus does a great job of providing an electronic resource to manage the data that drives your organization, we recognize that there are still many "paper-based" activities that are critical to your business. Because of that, Membership Plus has integrated, customizable reporting features that allow you to

- Easily generate IRS-compliant and Revenue Canada-compliant receipts for your members based on their contribution information you've entered into the program.
- Quickly generate reports with the Report Designer from the information in your database. WYSIWYG (What You See Is What You Get) simply makes it easy to drop and drag columns, fields, and data—even insert graphics.
- Produce customizable membership directories, Attendance tallies, pledges vs. contributions reports, and more through the Report Generator.
- All reports can now be emailed (To, CC, BCC) to any member, group of members, or non-members. They can be sent as file attachments, zip files, or directly in the email body, and can be sent in a variety of formats (Excel, HTML, PDF, RTF).
- All printed reports are now automatically archived to a database table, so at a later date, you can right-click any report to view an entire history of snapshots of each time the report was printed. This is very useful when needing to refer back to what was printed or sent out in the past.

Single User Install

In order to install and operate Membership Plus successfully, your computer system must meet the following minimum requirements.

Single System Requirements

- Windows 98/Me/2000/XP
- CD-ROM or DVD drive
- Pentium III or 500 or greater
- 128 MB or RAM
- 150 MB hard drive space
- 600 x 800 monitor display. 64K color or greater

Installation Instructions

First, start Windows, if it isn't already running. Close any other programs you have open, including screen savers, and disable antivirus programs. This will make the setup process go more smoothly and quickly.

Note: if you intend to use Membership Plus over a network, be sure to read the next section for network install.

Place the CD in your CD drive. The setup program launches automatically. If the setup fails to start after a few moments, follow these instructions.

1. Click the Start button and choose Run.
2. Type X:\autorun.exe in the Run dialog box, where X is your CD-ROM drive letter. Then click OK.

Once started, you will see the Membership Plus 2007 Installation Welcome Screen. This screen provides you the opportunity to install Membership Plus 2007 and Contributions@Home. You can also register your copy of Membership Plus 2007 or click on the name of another software application (i.e., QuickVerse for Windows) to visit our website and learn more.

During the installation, you'll be asked which programs you wish to install. Your choices will vary, depending upon the package you purchased. It is not necessary to install all the programs at once; you can return at any time to install a program.

- Install Membership Plus
- Install Contributions@Home
- Register Membership Plus
- QuickVerse Windows
- QuickVerse Handheld
- Ministry Notebook

After launching the Membership Plus install and accepting the License Agreement terms, proceed with the instructions on screen.

Setup Instructions

When all program files have been installed, you can view a README file that contains troubleshooting or other information not available when the other documentation was completed. (To view the README file at a later time, choose the appropriate icon in the program group where Membership Plus was installed.)

When the setup is complete, it may be necessary to restart your computer for all the changes to your system to take effect. Click OK to restart the computer, or click Cancel if you don't need to use Membership Plus until the next time the computer is started.

Setting up Membership Plus with the configuration indicated allows two or more users to view information in the database at the same time and to update that information in a controlled fashion. Any program that provides the capability to have multiple users updating a database must provide a mechanism to prevent two users from trying to change the same record at the same time. Otherwise, it would be possible for one user's changes to be overwritten by the other user, without either one being aware of the problem.

Network Install

Whether you are a single organization with just a few computers or a large organization with LANs, WANs, and multiple sites, Membership Plus is capable of providing the same powerful functionality throughout your network.

- Membership Plus Deluxe supports any networked PC.
- Network ready and multiple-user support available. (See inside package for Multi-user support fee details.)

Network Server Requirements

- Novell 4.1 or greater OR Windows Server 2000/2003/peer-to-peer with shared drive
- Pentium III 500 or greater
- 128 MB of RAM
- 100MB hard drive space

Using Membership Plus on a Network

Membership Plus allows multiple users to connect to the same database files via a network. For this multi-user capability, you will need to contact Parsons Church Group's Technical Support at 402.333.3075 to be licensed and registered as a network user. To set up Membership Plus for use on a network, the following configuration is suggested.

- A central copy of the database(s) for the entire organization is stored on the network file server.
- Membership Plus is installed on each client PC work station that needs to access the central database(s). **Note:** See Installation Instructions in the Single User Install section above.
- Individual users on client PCs connect to the central database(s) simply by selecting to open it at program startup.

It's very important that the same version of Membership Plus is installed on each computer running the program. The term "same version" refers both to major revisions (all computers running version 2007, not some remaining with version 2005) and minor revisions.

Note: After paying an additional fee, the Membership Plus license statement allows the program to be installed on as many computers as your multi-user license allows when all are accessing the same database over a network. Your license does not allow multiple installations in any other situation, such as the case where each computer and user maintains a separate database.

Product Registration

If you purchased Membership Plus directly from FindEx.com, Inc., you are automatically a registered customer. If you purchased this product from a retail store, visit us at **Quickverse.com**. We'll make sure you're registered and give you a registration code to enter into your program.

Registration entitles you to the following benefits:

- Notification of program upgrades.
- Announcements of other new products from FindEx.com, Inc.
- Opportunity to purchase Membership Plus Preferred Support. Preferred Support offers you the user a toll free support phone number and unlimited tech support help.

Be sure to contact us with any address changes so that we can keep you current with FindEx.com, Inc. developments.

Using Data from Previous Versions

If you've used a previous version of Membership Plus for member or financial tracking, you've probably invested a lot of time in setting up and maintaining your database. Most likely you'll want to convert that data to the version 2007 format so that you can build on what you've already done instead of spending time reentering a lot of information.

This section provides step-by-step instructions for converting data from any earlier version of the program to Membership Plus 2007. The conversion process applies to individual data sets; each previous version data set must be converted separately.

Before You Begin

The most important thing you should do before you convert your old Membership Plus data for use in version 2007 is create a backup copy of your data sets. All prior versions of Membership Plus have provided a built-in backup utility that you can use to create a safe copy of your data files.

The backup copy serves as a safeguard if any problem occurs during the data conversion process. The problem could be part of the conversion itself, or something outside the system, such as a power failure. If you've backed up your data files, you can restore the data should the need arise.

Membership Plus makes no attempt to correct corrupted data during the conversion process. If you have errors in your data in your current version, you'll have the same data errors in version 2007. If you have not performed data maintenance on a regular basis, you should use the diagnostic tools available in your current version of the program to check, verify, and repair any problems that may exist before converting your data to version 2007. Make a backup prior to performing these diagnostics; when you're satisfied with the condition of the data, make another backup before proceeding with the conversion.

Once data has been converted by Membership Plus 2007, you may not use that data with any prior version of Membership Plus. If you think that you might want or need to return to a previous version temporarily, be sure to make a backup copy before you open the data set with version 2007.

Conversion Process

The process of converting your data from a prior version of Membership Plus to the new version 2007 is a simple one and is the same no matter what prior version you were using.

The process begins by selecting to open the data set.

1. Start Membership Plus
2. In the Welcome Screen, select the data set under the Previous version you want to convert. If it's not listed, click the Browse

button and use the directory selector to locate the data set you wish to convert.

3. Click the Continue button.

A conversion process log appears on the screen as the Membership Plus 2007 conversion utility converts your data to 2007. The log is there for error-checking, for example if there are fewer records converted than that should have been, you are able to go back to the previous version and make sure that the required data is filled in for those records. If there are no problems with the conversion, you'll see the message Conversion Successful. You must go to the Data Set field to select it from the data set list.

The time necessary to convert your data depends on the size of your data set; please be patient and allow plenty of time for the procedure to complete. DO NOT CANCEL THE CONVERSION PROCESS. If you cancel the procedure, the data will be damaged, unstable, and unusable.

Converting from another Church management system

If you've been using another church management system, you may be able to export the data from that product and import it into a Membership Plus data set. Because of the differences between various programs, you will find that Membership Plus keeps track of either more or less information than you have available in your prior program. This may require you to edit the data you want to import before you bring it into Membership Plus. For example, you may have to edit the export file manually to create blank fields where Membership Plus expects information not provided by your prior program. In some cases, you might decide that it is easier simply to re-enter the data into your new Membership Plus data set than to try to automate the process.

Membership Plus imports data for members (names, addresses, contacts, and dates), as well as groups and group membership. It does not import any meeting, attendance, or financial information. For that reason, it may be best to start fresh with the beginning of the calendar or fiscal year and retain your old program for historical information. You can go back and enter historical information into Membership Plus as you find time.

Background and Planning

Managing the membership and financial records for your church or service group is a big job. Membership Plus can make that job easier by organizing your information, automatically keeping track of the tiny details, and providing tools that let you analyze the data, make decisions, and communicate with your members and the outside world.

Since it's such a big job, you might think you need to get started entering your data right away. You'll make quicker progress, though, if you take a few minutes to study the definitions and concepts presented in this chapter. Understanding what Membership Plus means when various terms are presented will give you a head start and allow you to make progress right away when you start using the program. A little thinking and planning about your organization's needs will enhance your efficiency and the accuracy of your data.

Analyzing Your Organization and Gathering Data

Membership Plus can manage a virtually unlimited amount of data about your members. Before you get started using the program, it might be to your advantage to think about the types of information that your organization currently tracks or would like to track. You may or may not want to try to enter data for every single field in Membership Plus.

For example, do you want to keep track of information about individual members and their families, individuals only, or families only? That very basic decision affects the other data you will want to collect and have available when you sit down with Membership Plus. If you only track families, for example, the marital status or birthdays of individuals isn't relevant to your needs. In other organizations, those details may be basic information that should be entered for everyone.

If you will be using Membership Plus primarily for recording contributions, it doesn't make sense to spend time entering a lot of personal data about all your members. Even if they're all contributors, some or most of the detail you can record and monitor for your membership isn't relevant to contribution records.

Unless your organization is just getting off the ground, you already have some sort of system in place for tracking information about your members. Whether it's another software program or a paper-based system, you can use it as a starting point for figuring out what data you want to enter into Membership Plus.

- Look at your current system and make a list of every piece of information you're tracking. Be sure to identify those items for which there is no "organized" way to monitor the data. For example, there may not be a specific field in the software where you can enter a certain piece of information, so you may have been using a note field for that purpose.
- Analyze each item and decide if it's worth continuing to maintain. If no one in the organization ever uses a particular piece of data, there's no need to take the time to gather the information, enter it, and update it on a regular basis.
- Finally, add to the list the information that your organization wants to start tracking. This could be information for which there was a good place to record the data in your previous software, or items that are new to your membership.

  For example, if your church or group only recently set up an Internet email account, you may want to start gathering email addresses from your members so that you can communicate with them via email instead of regular mail.

Starting to use a new program like Membership Plus provides a good opportunity to update records for all of your members. You need an organized procedure to collect up-to-date information from all your members so that you can enter it into the program.

One way to do this is to create a fill-in-the-blank member information form. The form should include space for each individual or family to record the information your organization wants to track. Distribute copies of the form to all your members and use them as the basis for entering initial information into the program.

Provide the form, or a modified version of it, to new members as they join your organization. You may want to redistribute the form to your entire membership periodically to gain updated information and keep your database current. (In fact, this is a good idea even if you've been using previous versions of Membership Plus for years.)

This Getting Started Guide provides two simple example forms you can use as they are or as a starting point for designing your own form. One is for individuals; the other is family-oriented. Enter a requested return date and the name of the person who will be responsible for collecting the forms in the spaces provided, then make enough copies to distribute to every member in your organization. The sample forms are located at the end of the book.

Entering Information Manually

There are two strategies for manually entering your member information: doing it all at once, or doing it as you need it.

If you plan to use all or most of the features of Membership Plus (reports, mailing labels, contribution tracking, and recording attendance), it might be worth the effort to spend some time entering all of your basic member information at once.

Take the time to set up basic financial information, too. You'll need information about the banks your church uses, and about the accounts, categories, and/or classes used in your financial accounting system. Work with the person who does the accounting for your organization to set up this information in Membership Plus.

Then you can focus on the details of contribution data entry or attendance tracking without having to enter member information for every new member you encounter.

On the other hand, you might choose to enter information only as you need it. This is an especially effective strategy if your primary use for Membership Plus is to track contributions. Instead of spending time entering all the members of your organization into your data set, you just create new members as you need to enter contributions.

When you get a check from someone who is not already in the data set, simply add that individual or family using the name, address, and phone information from his or her check.

This approach will increase the time it takes to record the first few weeks' worth of contributions, but it may save some time in the end since you don't have to enter any information for anyone who is not a contributor.

After a few weeks you can fill in the rest of the information about each contributor’s family, alternate addresses, employers, and so on. This allows you to get started immediately with Membership Plus without a lengthy data entry period.

You can use this same approach to define new funds. As you receive a contribution for a fund that is not yet in the data set, simply add the fund. Once you’ve saved the new fund record, you can proceed to enter the contribution.

Definitions and Concepts

Information you enter into Membership Plus is organized into categories called “modules.” Each time you need to enter or retrieve information, you use the module that best describes your information. For example, information about Contributions is entered in the Contributions module, and attendance at meetings is entered in the Meetings module.

Each module opens in its own window, and you can have more than one module open at the same time. To access an open module, simply select it from the drop-down menu in the application toolbar.

You need to know “who’s who” in Membership Plus so you can enter information most effectively and accurately.

Members

Membership Plus revolves around members. At its simplest level, a member is anyone who belongs to your church or service group. In Membership Plus, there are three types of members:

- **Individuals**—An individual is any one person.
- **Families**—You can think of a family as a collection of related people—dad, mom, and the kids—or as a collection of people who share the same address. Some churches don’t track individuals, so Membership Plus provides flexibility that allows a family member to be an entity all its own.
- **Organizations**—An organization is a business, another church or service group, or any other “non-person” legal entity.

Tip: If you’ve used Membership Plus before, you’ll notice that these terms are used differently than they may have been used in your previous version.

Individuals can be categorized further as guardians or dependents. A guardian is someone who heads a household. For example, both parents might be designated as guardians. A dependent is anyone who is not a guardian. Children generally are designated as dependents.

Individuals can be linked to families, or an individual record can stand on its own. (Each individual can be related to only one family, though.)

A family can have individuals linked to it or not, according to the information available and how you want to keep track of it.

You also can track members who may not technically belong to your organization, such as visitors, guest speakers, individuals or families who have moved away, and the like. Membership Plus provides many customization features to help you. For example,

- Each member in your database can be assigned a status type, such as Active or Inactive
- You can set up different status types such as Visitor, Former, or Prospective to indicate the “special case” members, then later use the status type as a way to send a mailing only to those designated Visitor to invite them to visit again.
- You can use the visitation module to track visitors and your correspondence with them.

Groups

A group is a collection of members (of any type) drawn together for a specific task or because of a certain trait (i.e., a certain age, all participate on a certain committee, all have children that attend Sunday School, etc.).

- You may create some groups to represent classes or committees that meet on a regular basis, such as Sunday School classes, the choir, or your steering committee. (You can use Membership Plus to track the meetings and corresponding attendance.)
- You may want to create some groups for people who don’t meet but who have something in common, such as widows and widowers, musicians, or college students. These types of groups help you identify potential needs among your members or can identify those who might be able to meet the needs of others in special situations.
- You might also want to organize some members into “list” groups to make it easier to send newsletters or other mailings.

The only thing the members of a list group need have in common is that they’re all on the same mailing (or other contact) list, such as the weekly newsletter or a prayer chain.

In Membership Plus you can apply a classification to each group to help identify its purpose or function within your organization. Each member in the group can be assigned a role, making it easy to distinguish the class teacher from the students, for example. (In small churches you'll probably recognize the names automatically, but assigning a role is useful for reporting purposes as well.)

You also may want to create "supergroups," or "groups of groups." A supergroup might be the Sunday School, with each Sunday School class a subgroup of the supergroup. The additional layer of structure can make tracking and reporting easier in situations where it makes sense to arrange your groups this way.

The term "group" sounds a lot like "organization." In fact, after reading Members, but prior to reading Groups, you might have been planning to enter your classes and committees as organizations, rather than creating groups. Actually, in some cases you might need or want to do both. Here are some of the differences in how Membership Plus treats organizations and groups.

- An organization is a type of member; a group is a collection of members.
- An organization has an address; a group doesn't.
- An organization can make financial contributions or pledges; a group cannot.
- A group has meetings and corresponding attendance records; an organization does not.

Small Groups

Small Groups are one of the most effective ways to organize church membership groups for the purpose of worship, discipleship, evangelism, service, and fellowship. Small groups provide a more intimate setting for Bible study, spiritual growth, accountability, and support for those with special needs. Small groups are Sunday school classes, youth group, men's Bible study, women's Bible study, the list can go on and on.

The Small Groups Module supports an unlimited number of small groups. You can track members, member roles, contact information, meeting times/days, locations, leader, activities, and keep attendance history on every Small Group member.

Funds

A fund is a sum of money or other resources designated for a particular purpose. The use of funds lets your organization track your members' desire for how the money they give to your organization is to be used.

A fund can be as general as General Fund (for unrestricted contributions or money donated to cover general operating expenses) or more specific, like Memorial Library Book Fund (representing money donated to purchase books for the library in memory of deceased members).

These are just sample names, of course. You'll set up funds in your data based on members' designated pledges and contributions, taking into consideration how you wish to track giving records or income. As a starting point, your Membership Plus funds should mirror the income accounts in your financial accounting data.

Contributions and Pledges

Nearly every church and service group depends on contributions to survive. Whether in the form of donations or membership fees, money keeps the doors open and the lights on.

A *contribution* is a one-time gift of money. For instance, money placed in the collection basket at a church service is a contribution. Contributions may be designated for certain uses or for general operating purposes—in other words, a contribution is given toward a fund. If your church takes a special collection at a service to support a visiting missionary, the contributions in that collection are made toward your Missions Fund (or whatever you call it).

A *pledge,* on the other hand, is a promise to give a certain amount of money over a designated period of time. In most cases, a pledge is expressed as dollars per week or month for a specified time frame (such as $25 per week during the calendar year). A pledge also is made toward one of your organization's funds. It's very common, for example, to have members pledge toward the New Building Fund before the organization can commit to breaking ground.

You can think of pledges as money that is owed to your organization. When you enter contributions from your members, you can indicate that a particular contribution is to fulfill a particular pledge made by that individual.

> **Note:** Strictly speaking, **Membership Plus** does not provide any "billing" functions. However, you can generate reports of your members' pledge and contribution records to let them know whether or not they've fulfilled their pledge obligations.

Some organizations don't use pledges. Others rely on them extensively. Membership Plus works with whatever your organization's approach is.

Deposits

In reality, the money contributed to your organization is deposited in the bank. In Membership Plus, a deposit is a collection of contributions that corresponds to the bank deposit. Whether you do it weekly, monthly, or on some other schedule, a deposit can be tracked both in Membership Plus and in your accounting or financial management program.

Deposit records can be exported from Membership Plus for import into Quicken or QuickBooks from Intuit. Creating deposit records in Membership Plus can help with bank reconciliation by tracking the detail of exactly which contribution receipts made it to the bank in which deposit on the bank statement.

In Membership Plus, deposits are also a requirement for the periodic archiving of financial transactions, generally a year-end procedure.

Practicing with Sample Data

Membership Plus can keep track of a lot of information that is important to the effective operations of your church. Much of it is sensitive data—phone numbers, contribution data, and so on. So it's important that all the data be entered correctly and as efficiently as possible. The background information you've gained and the planning you've done as a result of reading this chapter will go a long way toward helping you make effective use of the features of Membership Plus from the very beginning. But you may be a little bit leery of jumping right in. If that's the case, a little bit of practice may be just what you need.

Membership Plus provides sample data that you can use to view the program's features and functions. You can see examples of member, group, and financial data and generate sample reports to see what you can do with each piece of information. Plus, you'll see examples of the kinds of "user-defined" fields and data that can be created and entered to customize the program for a church or other service organization.

If you want to practice entering data before you commit to entering your organization's "real" data, you might want to create your own practice data set. Using a small subset of your real data can provide a better indicator than the sample data of what the program's features can do to meet your organization's specific needs. You'll recognize your organization's members in the reports, for example, and you'll know where you entered the data and how it's used. See the differences between individual members, individuals linked to families, and "stand-alone" family unit members to decide which type(s) of member records make the most sense. Practice entering pledges and contributions so that you can see which information you need at what point in the data entry process for the most efficient entry. You can do all of this—and more—in a practice data set, gaining confidence in your understanding of the program's features without worrying about "damaging" your real data.

Information about creating and opening data sets is found in the following section.

Starting Membership Plus

Starting Membership Plus 2007 is easy.

1. Click the Start button in the Windows taskbar (normally locate in the lower left corner of your screen).
2. Choose Programs, then choose the Program Group where you selected to install Membership Plus 2007. The default group is Parsons\Membership Plus.
3. Choose Membership Plus 2007 from its program menu.

This will bring you to the Membership Plus **Welcome Screen**. The Welcome Screen is structured to provide you quick access and "at-a-glance" information every time you start the program.

Each person who will be using the program should be entered as a Program user. There are two main reasons for creating a user Identification.

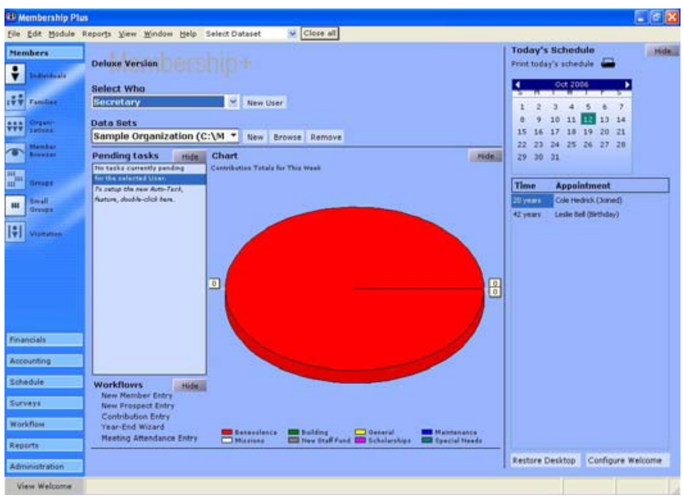
- Each user can specify a set of general program preferences through the use of a desktop configuration. These preferences and configuration settings are saved with in a User Profile that is loaded each time that user is selected.
- To identify, in multi-user situations, who modified a particular record.

Enter as many user names as possible now; you can always create more users later. To add a new user, select the **Program Properties Option** from the **File Menu** or click on the **New User Button** in the **Welcome Screen**.

You will also want to make sure you have all of your previous data sets.

Selecting the Program User and the Data Set to Open

When you have completed the installation of Membership Plus 2007 select the **Membership Plus 2007** option from the sub heading **Parsons** from the **Programs** option from the **Start Menu** on you computer. This opens the Membership Plus 2007 application and displays the **Welcome Screen**.



On the Welcome Screen, you can:

- **Identify yourself as the current user of the program**. Simply select your name from the **Select Who** drop-down menu. However if you need to set up a new user click on the **New User Button**.
- **Module Selection Bar—**select the Membership Plus module you would like to work with from the vertical button bar on the left-hand side of the Welcome Screen.
- **View "Today's Schedule."**—You can view today's events, birthdays, anniversaries, meetings and meeting time by looking at the event section on the right-hand side of the Welcome Screen. The Appointment will display what or who the information is about.
- **Select the data set you want to open—**Locate the desired data set in the **Data Sets** drop-down. If your organization spans multiple locations (i.e., a few churches), you may want to have different data sets for each. Through the Welcome Screen, you can quickly and easily access those data sets.

  If you don't see your data set in the Data Set Drop-down, you can locate the database files by clicking the Browse button. This will allow you the opportunity to search your hard drive (or the network).

Note: If the data set you selected to open contains previous version data, the data conversion process launches automatically.

- **Pending Tasks**—Displays a list of tasks to completed. **Note:** Available only in Membership Plus Deluxe.
- **Quick View Chart**—View graphs of contributions, attendance, member special dates, and progress toward organization goals.
- **Workflows**—The Welcome Screen provides a list of Workflow Wizards that you can launch quickly.
- **Customize the welcome screen**. If you want to see different information on your opening screen, click the **Configure Welcome Button**. From the Configuration Window, you can specify the graph (and its parameters) as well as the list of Workflow Wizards.

Feel free to take a few minutes and investigate the program. It will take time to become familiar with the locations of features and the functions of each button. But don't enter any data just yet. Before you start entering your member records and financial information, you should set up defaults that will make data entry quicker, more efficient, and more consistent.

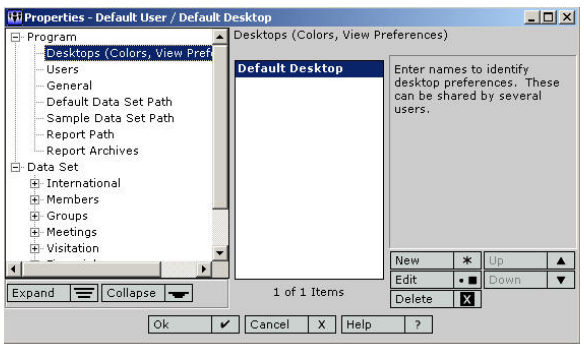
Specifying Program and Data Set Properties

There are two different types of properties or defaults that you can set up in Membership Plus.

- **Program properties** refer to items that affect the way the program behaves or appears.
- **Data set properties** are items that provide structure for your data entry or make the data entry process more efficient. If you have more than one data set, you can set up different default properties for each one, depending on the information that's appropriate for the relevant organization.

Program properties can be set or changed at any time. Data set properties can be set or changed any time, too, but since data set properties affect the accuracy of your data and the efficiency of entering it, it's very important that you properly establish as many data set properties as possible before you begin entering records.

To set up properties for your data set and for the Membership Plus program as a whole, choose Properties from the File menu.



The Properties dialog box provides an expanding/collapsing “tree” on the left, similar to My Computer in Windows. A plus (+) sign indicates that more branches are available; a minus (-) sign indicates that the tree is fully expanded. The information pane on the right corresponds to the selected “tree branch” on the left.

To expand a tree view, click the (+) in front of the section you want to expand. To collapse a tree view, click the (-) in front of the section you want to collapse. Or use the Expand All or Collapse All buttons to open or close all branches of the tree at once.

Tip: Hold your mouse pointer over an item that is too wide for the display area to see its full name in a “fly-out.”

Program Properties

The following items are available in the Program section of the Properties dialog box. At this point you may not recognize all the options that are being presented to you. As you familiarize yourself with Membership Plus you’re likely to discover many behaviors and appearances that you’d like to customize or modify. The Program Properties should be the first place you look.

Desktops

A desktop theme can be shared by multiple users of the program on the same computer, or each user can create a configuration that reflects his or her preferences. Click the New button to create a “set” of desktop preferences. The Desktop Configuration dialog box that opens has two tabs:

- **Colors**—Specify the color to be used for display of various items and information in the program. Select the item in the scrolling list of program elements, then pick a color from the drop-down list below. Click the Drop down arrow for even more choices.
- **Miscellaneous**—Specify your preferences for showing or saving several program elements, such as grid layout, position and size of module windows, gradient bars, and the overall desktop.

The Family Indentation Value field allows you to specify how much to indent the names of individuals under their family name in lists like the Member Browser. If you leave the value at zero, all names will be left-aligned; increasing the value indents guardians the specified number of spaces under the family name, and dependents that many more spaces under the guardian names.

When you're done, click **Save As** and provide a name for your personal desktop configuration.

Users

All the users you have created should appear in the list of users in the pane on the right. Select your name and click the Edit button to attach your new desktop theme to your user name.

General

Specify your preferences for the appearance or suppression of several general items—the program splash, information in the status bar, and backup reminder.

General program properties are stored "locally," so if you and a user on another computer are using Membership Plus over a network, each of you can specify your own preferences.

Default Data Set Path

Specify the default location for storing your data. If you'll be running Membership Plus over a network and accessing a central database on your server, you should enter the complete path to the data on the server. (The server must be mapped as a network drive, with a drive letter.) Click the Browse button to locate the correct directory, if necessary.

Sample Data Set Path

Enter the path where the sample data is stored. This location was set during program setup. However, if you have created your own "practice" data set, you might want to enter that path here in place of the path to the program-supplied data set. That way you'll have easy access to your practice data set.

Report Path

Enter the location where your report support files will be stored. This location was set during program setup but you can change it, if you like. For example, if you'll be accessing data over a network, you'll want to make sure you're accessing the same report files on the network that all other users are using.

Data Set Properties

The following items are available in the Data Set section of the Properties dialog box. It's very important that you properly establish as many data set properties as possible before you begin entering records. Type directly in any fields provided in the pane on the right (or mark check boxes or radio buttons), or click the Add button to open a dialog box to add an item to a list.

> **Tip**: If you're converting data from a previous version of Membership Plus, you'll need to perform the conversion first, then open the Properties dialog box to verify, add, and "clean up" your data set defaults.

International

Specify the formats you desire for phone numbers, ZIP or postal codes, and Social Security numbers. Membership Plus will try to format your data as you enter it. For example, if you select the (555) 123-4567 phone format, the program will add the parentheses and dash in the correct places. 4023333075 automatically becomes (402) 333-3075.

Members

Indicate your preference for each of these member-related items.

- **Address Defaults**—Specify pieces of address information that are common to most or at least many of the member records you will enter. For example, if most of your members live in Omaha, you would enter that in the City field here. When you add new members to your database, the common address fields are completed automatically.
- **Display Name**—Enter your preferences for the "displayed name" of your family and individual members.

- **Families**—Enter the prefix and suffix to be used when adding family records. For example, your prefix could be The and your suffix, Family. When you enter a new family record by entering the last name (such as Smith), Membership Plus creates the record as The Smith Family.
- **Individual**—Indicate your preference for whether the personal title (such as Mr. or Mrs.) should be added automatically to the mailing label name when creating new individual records.
- **Status Types**—Enter labels for the different statuses that a member can hold within your organization, such as Active, Inactive, Visitor, Prospective, or Former. Status types are mutually exclusive for any member. A member cannot be both Inactive and Former, for example.
- **Marital Types**—Enter labels for the types of marital status you want to track within your organization—Married, Single, Widowed, or Divorced, for example.
- **Gender Types**—Enter labels for the types of genders you want to track. For most organizations, Female and Male are adequate.

Tip: When you enter status, marital, and gender types, use the Move Up and Move Down buttons to arrange your entries in order of frequency used. Put the most frequently used item at the top of the list. This will make data entry for new members much quicker because you won't have to scroll through the lists for most members to find the entry you want.

- **Date Fields**—Enter labels for any dates or events you want to track for a member. For example, many churches and service organizations like to know members' birthdays and when each member joined.

  In addition to specifying a label such as Birthday, you can indicate the types of members to which the date applies. Only individuals have birthdays, for example—not families or organizations.

  You'll also want to specify the default format for the date—for birthdays you may want the full month, day, and year, but tracking the date a member joined your organization may require only month and year.

Date fields can be used to track both past and future events. If your group has high school and college student members, for example, you may want to track anticipated graduation dates for them.

- **User Fields**—Membership Plus stores a great deal of information, but every organization has its own special needs. You can create your own fields to track any information not accounted for elsewhere in the Membership Plus database. If each member of your organization has a unique Member ID, for example, add a user field to track it.

  When you add a user field, you can specify the types of members to which the item applies. You also can customize the type of field created for the information you're trying to track:

  - **Text**—Use this type of control if you want to be able to type anything in the user field. The possibilities are virtually unlimited.
  - **Combo Box**—Select this type of control, and click the List button, to specify allowable entries for the field. Using combo boxes for some types of user fields can enforce consistency of data entry over time. You might use a combo box user field to track the school that each child in your membership attends.
  - **Check Box**—Use a check box control if the information you want to track can be answered with a simple Yes or No? question. For example, if you want to keep track of which members know CPR, you could create a check box user field. Either an individual knows CPR, or he doesn't.
  - **Number**—Use the number format if all data for the user field will be numeric. If your Member IDs are numeric rather than alphanumeric, use this type of field.

  Understanding these types of user fields, and selecting the most appropriate type for each new user field you create, will help you get the best possible benefit from the data you're trying to track. Data entry will be easier and the data will be more accurate and consistent, as well.

Tip: Before you create a user defined field for something you want to track about your members, make sure it's not something for which Membership Plus already provides a place for your entry.

- **Note Types**—Enter labels for the types of notes that will be kept for your membership. The minister might want to make notes about counseling sessions, for example, so you'd add Counseling as a note type.

  Unlike the other lists of labels (which allow you to add an unlimited number of items), note types are limited to the five notes established by the Membership Plus program (no more, no less). You can edit the labels so that they are more descriptive, but the labels are position-sensitive and you cannot rearrange them in a different order. The labels you specify correspond to the five pages of notes available in the Member Notes module.

Tip: Each note type can be protected separately via limited access rights, if necessary or desired for security or privacy reasons.

- **Contact Labels**—Enter labels for the types of contact information you'll be tracking. Generally the label will be a location, such as Home or Work; then specify the types of contacts available at this location—Voice, FAX, Pager, Email, or Web Site

  Each combination of label and type of contact creates a separate contact field for which you can enter data; if you enter Home and mark both Voice and Email, the fields Home (Voice) and Home (Email) are created. When you enter data for a specific member, you can select exactly which contacts are appropriate for the individual, family, or organization.
- **Family Roles**—Enter roles you want to record for individuals within a family. For example, you might want to specify who are the Father and Mother within a family. Child roles could be simple and general (Child), gender-specific (Son and Daughter), or chronologically based (Oldest Child, Middle Child, and Youngest Child)—or some other plan—depending on the

information you want to track about the members of your organization.

- **Default Picture Path**—Enter the path to the directory where files of member pictures will be stored. Click the Browse button to locate the correct directory, if necessary. Specifying the default path here will make it easier and quicker to locate the files when you attach member photos to their records.

Groups

Enter labels for the roles that each member can play within a group. Examples might be **Student** and **Teacher**, if you use groups for Sunday School or other classes, or **Member**, **Chair**, and **Secretary** for a committee-type group.

Group roles are mutually exclusive for any member in a specific group. That is, a member cannot be both student and a teacher of a group. That member can be a student in one group and a teacher in another, however.

Meetings

Enter labels for the attendance codes appropriate to the way your organization tracks attendance at meetings. (Meetings can include Sunday School classes, committee meetings, or even your regular worship service). Typical attendance codes might be as simple as Present and Absent.

> **Tip**: Be sure you arrange the attendance codes in order from most used to least used. Use the Move Up and Move Down buttons to rearrange your items, if necessary. Ordering the codes appropriately will streamline the process of entering attendance for meetings.

Visitation

Enter the types of visitation responses that you want to track. You can also add new ones if you desire.

Financials

Indicate your preference for each of these financial-related items. (If you'll be using Membership Plus only for attendance tracking, not the financial tracking features, you don’t need to spend time setting up financial properties and defaults.)

- **Fiscal Year**—Indicate the end of the fiscal year used by your organization.
- **Pledges**—Enter the appropriate day of the week on which to base weekly and biweekly pledges. Although there are 52 weeks in a year, there are 53 of some days of the week each year—and it’s a different day of the week each year. if your pledges are based on your Sunday service, select Sunday.
- **Funds**—Indicate whether you want to display funds using account numbers rather than their names.
- **Contributions**—Indicate your preferences for these options that affect the flow of contribution data entry. Use the Start at Date Field option if the date needs to be considered separately for each individual contribution that is entered. The Require Batch IDs option controls whether or not a batch ID must be entered to create a valid contribution record.
- **Currency**—Enter labels for the types of currency in which your contributions are received. Check and Cash are typical examples.

Tip: Just like other lists of labels indicated earlier in this section! you’ll want to use the Move Up and Move Down buttons to arrange the labels in the best order to speed data entry.

- **Contributors**—Indicate whether envelope numbers can be alphanumeric instead of strictly numeric and whether to display contributors by envelope number rather than by name. If for privacy reasons the person entering contributions should not know exactly who is making a particular contribution, you’d want to use envelope numbers to “hide” the names.

  Also indicate which types of members can pledge and/or contribution For example, some churches consider all contributions to be received from the family rather than from the individual members; if this is your situation, to prevent data entry errors you would want to unmark guardians and dependents. The reverse is true in other churches, and you’d want to set the properties the opposite way.

- **Deposits**—Indicate the financial software, if any, to which you will export deposit information, and enter the complete path to that software's corresponding data files for your organization. Use the Browse button, if necessary, to locate the file or directory.
- **Register (GL)**—Reminders can be set for auto transactions and when checks are to be printed. Indicate whether to defer posting checks until after they are printed. Choose to have the program automatically add account numbers.

Organization

Indicate the name of your organization, contact information, and your organization's address. The organization name you enter here will appear in the program's title bar; other information can be used in reports.

Quick Reference

Membership Plus is a powerful record-keeping software program designed for churches and non-profit service groups. You can use the program to track member information, analyze the data, make decisions, and communicate with your congregation or organization.

The tools you need to organize and manage your member database are only a few mouse clicks away.

Listed below are the different Membership Plus modules and brief instructions on how to use each module's features. Access these modules by clicking the corresponding button on the Modules bar on the left of the window, or through the Modules menu on the menu bar. For more extensive assistance on how to use all features, see Membership Plus Help.

Membership Modules

Individuals (Standard and Deluxe)

- **List Tab**
  - ❖ Displays a list of all of the individuals that you have entered.
  - ❖ To view an individual's information, highlight the member's name in the list and click a tab from the bottom of the page that relates to what you would like to do with the member's information.
  - ❖ To add a new member, click the add button on the tool bar. To edit a member's information, highlight the member's name in the member list on the List page. Click the edit button on the tool bar. Membership Plus will move to the Data Entry page. Click the save button when done.
- **Summary Tab**
  - ❖ View member information you enter on the Data Entry page of the Individuals module.
  - ❖ On the List page highlight a member then click on the Summary Tab. A preview screen displays all entered member information. Use the tool bar buttons to view pages, print, email, or export the member summary.

- **Data Entry Tab**
  - ❖ Add new member information or edit existing member information. Enter everything from name, address, and telephone number to birthday and email address.
  - ❖ Click on the add, edit, save tool bar buttons to enter or modify member information.
- **Pictures Tab**
  - ❖ Add, edit, or view member pictures on this page.
  - ❖ Use the add, edit buttons at the bottom of the page to add or modify member pictures. Clicking the add button opens a browser so you can locate the member's picture. Clicking the edit button opens the Image Editor for you to make picture adjustments.
- **Reports Tab**
  - ❖ Displays any reports that you have already created for a particular member.
  - ❖ Select a report from the Report field on the Report page tool bar. Use the Select option and date range option for your report. Use the tool bar buttons to view pages, print, email, or export the member report.
- **Import/Export Tab**
  - ❖ Allows you to export or import information to other locations/programs and synchronize information between Membership Plus and Microsoft Outlook.
  - ❖ Click on one of the option buttons at the top of the page. The page changes for each button. Follow the instructions on the page. Use the buttons at the bottom to navigate through the exporting, importing, or synchronizing processes.

Families (Standard and Deluxe)

- **List Tab**
  - ❖ Displays a list of all of the families that you have entered.
  - ❖ To view a families information, highlight the family's name in the list and click a tab from the bottom of the page that relates to what you would like to do with the family's information.

- To add a new family, click the add button on the tool bar. To edit a family's information, highlight the family's name in the list on the List page. Click the edit button on the tool bar. Membership Plus will move to the Data Entry page. Click the save button when done.

- **Summary Tab**
  - View family information you enter on the Data Entry page of the Families module.
  - On the List page highlight a family then click on the Summary Tab. A preview screen displays all entered family information. Use the tool bar buttons to view pages, print, email, or export the family summary.
- **Data Entry Tab**
  - Add new family information or edit existing family information. Enter everything from name, address, and telephone number to birthday and email address.
  - Click on the add, edit, save tool bar buttons to enter or modify family information.
- **Pictures Tab**
  - Add, edit, or view family pictures on this page.
  - Use the add, edit buttons at the bottom of the page to add or modify family pictures. Clicking the add button opens a browser so you can locate the family's picture. Clicking the edit button opens the Image Editor for you to make picture adjustments.
- **Reports Tab**
  - Displays any reports that you have already created for a particular family.
  - Select a report from the Report field on the Report page tool bar. Use the Select option and date range option for your report. Use the tool bar buttons to view pages, print, email, or export the family report.
- **Import/Export Tab**
  - Allows you to export or import information to other locations/programs and synchronize information between Membership Plus and Microsoft Outlook.
  - Click on one of the option buttons at the top of the page. The page changes for each option. Follow the instructions

on the page. Use the buttons at the bottom to navigate through the exporting, importing, or synchronizing processes.

Organizations (Standard and Deluxe)

- **List Tab**
  - ❖ Displays a list of all of the organizations that you have entered.
  - ❖ To view an organization's information, highlight the organization's name in the list and click a tab from the bottom of the page that relates to what you would like to do with the organization's information.
  - ❖ To add a new organization, click the add button on the tool bar. To edit a organization's information, highlight the organization's name in the list on the List page. Click the edit button on the tool bar. Membership Plus will move to the Data Entry page. Click the save button when done.
- **Summary Tab**
  - ❖ View organization information you enter on the Data Entry page of the Organizations module.
  - ❖ On the List page highlight an organization then click on the Summary Tab. A preview screen displays all entered organization information. Use the tool bar buttons to view pages, print, email, or export the organization summary.
- **Data Entry Tab**
  - ❖ Add new organization information or edit existing organization information. Enter everything from name, address, and telephone number to birthday and email address.
  - ❖ Click on the add, edit, save tool bar buttons to enter or modify family information.
- **Pictures Tab**
  - ❖ Add, edit, or view organization pictures on this page.
  - ❖ Use the add, edit buttons at the bottom of the page to add or modify organization pictures. Clicking the add button opens a browser so you can locate the organization's picture. Clicking the edit button opens the Image Editor for you to make picture adjustments.

- **Reports Tab**
  - ❖ Displays any reports that you have already created for a particular organization.
  - ❖ Select a report from the Report field on the Report page tool bar. Use the Select option and date range option for your report. Use the tool bar buttons to view pages, print, email, or export the organization report.
- **Import/Export Tab**
  - ❖ Allows you to export or import information to other locations/programs and synchronize information between Membership Plus and Microsoft Outlook.
  - ❖ Click on one of the option buttons at the top of the page. The page changes for each button. Follow the instructions on the page. Use the buttons at the bottom to navigate through the exporting, importing, or synchronizing processes.

Member Browser (Standard and Deluxe)

- **List Tab**
  - ❖ Displays a list of all of the members that you have entered.
  - ❖ To view a member's information, highlight the member's name in the list and click a tab from the bottom of the page that relates to what you would like to do with the member's information.
  - ❖ To add a new member, click the add button on the tool bar. To edit a member's information, highlight the member's name in the list on the List page. Click the edit button on the tool bar. Membership Plus will move to the Data Entry page. Click the save button when done.
- **Summary Tab**
  - ❖ View member information you enter on the Data Entry page of the Member Browser module.
  - ❖ On the List page highlight an organization then click on the Summary Tab. A preview screen displays all entered member information. Use the tool bar buttons to view pages, print, email, or export the organization summary.

- **Data Entry Tab**
  - ❖ Add new member information or edit existing member information. Enter everything from name, address, and telephone number to birthday and email address.
  - ❖ Click on the add, edit, save tool bar buttons to enter or modify member information.
- **Pictures Tab**
  - ❖ Add, edit, or view member pictures on this page.
  - ❖ Use the add, edit buttons at the bottom of the page to add or modify member pictures. Clicking the add button opens a browser so you can locate the member's picture. Clicking the edit button opens the Image Editor for you to make picture adjustments.
- **Reports Tab**
  - ❖ Displays any reports that you have already created for a particular member.
  - ❖ Select a report from the Report field on the Report page tool bar. Use the Select option and date range option for your report. Use the tool bar buttons to view pages, print, email, or export the member report.
- **Import/Export Tab**
  - ❖ Allows you to export or import information to other locations/programs and synchronize information between Membership Plus and Microsoft Outlook.
  - ❖ Click on one of the option buttons at the top of the page. The page changes for each button. Follow the instructions on the page. Use the buttons at the bottom to navigate through the exporting, importing, or synchronizing processes.

Groups (Standard and Deluxe)

- **List Tab**
  - ❖ Displays a list of all of the groups that you have entered.
  - ❖ To view a group's information, highlight the group's name in the list and click a tab from the bottom of the page that relates to what you would like to do with the group's information.

- To add a new group, click the add button on the tool bar. To edit a group's information, highlight the group's name in the list on the List page. Click the edit button on the tool bar. Membership Plus will move to the Data Entry page. Click the save button when done.

- **Summary Tab**
    - View group information you enter on the Data Entry page of the Groups module.
    - On the List page highlight a group then click on the Summary Tab. A preview screen displays all entered group information. Use the tool bar buttons to view pages, print, email, or export the group summary.
- **Data Entry Tab**
    - Add new group information or edit existing group information. Enter everything from group name and classification to group members and roles within the group.
    - Click on the add, edit, save tool bar buttons to enter or modify group information.
- **Reports Tab**
    - Displays any reports that you have already created for a particular group.
    - Select a report from the Report field on the Report page tool bar. Use the Select option and date range option for your report. Use the tool bar buttons to view pages, print, email, or export the group report.
- **Transfer Data Tab**
    - Allows you to export or import information to other locations/programs and synchronize information between Membership Plus and Microsoft Outlook.
    - Click on one of the option buttons at the top of the page. The page changes for each button. Follow the instructions on the page. Use the buttons at the bottom to navigate through the exporting, importing, or synchronizing processes.

Small Groups (Standard and Deluxe)

- **List Tab**
  - ❖ Displays a list of all of the small groups that you have entered.
  - ❖ To view a small group's information, highlight the small group's name in the list and click a tab from the bottom of the page that relates to what you would like to do with the group's information.
  - ❖ To add a new small group, click the add button on the tool bar. To edit a small group's information, highlight the small group's name in the list on the List page. Click the edit button on the tool bar. Membership Plus will move to the Data Entry page. Click the save button when done.
- **Summary Tab**
  - ❖ View small group information you enter on the Data Entry page of the Small Groups module.
  - ❖ On the List page highlight a small group then click on the Summary Tab. A preview screen displays all entered small group information. Use the tool bar buttons to view pages, print, email, or export the small group summary.
- **Data Entry Tab**
  - ❖ Add new small group information or edit existing small group information. Enter everything from small group name group type, meeting day and time, location, leader, and child care to small group members and roles within the group.
  - ❖ Click on the add, edit, save tool bar buttons to enter or modify small group information.
- **Meeting Tab**
  - ❖ Add, edit or display small group activity history and attendance information.
  - ❖ Enter everything from activity description, type, date, notes and feedback to member attendance and history and visitors.
- **Reports Tab**
  - ❖ Displays any reports that you have already created for a particular small group.

- ❖ Select a report from the Report field on the Report page tool bar. Use the Select option and date range option for your report. Use the tool bar buttons to view pages, print, email, or export the small group report.

Visitation (Standard and Deluxe)

- **List Tab**
  - ❖ Displays a list of all of the prospects and visits that you have entered.
  - ❖ To view a prospect's information or visit information, highlight the prospect's name or visit in the list and click a tab from the bottom of the page that relates to what you would like to do with the prospect's or visit information.
  - ❖ To add a new prospect or visit, select either the prospect pane or the visit pane. Click the add button on the tool bar. To edit prospect or visit information, highlight the prospect or visit in the list on the List page. Click the edit button on the tool bar. Membership Plus will move to the Prospect or Visit page. Click the save button when done.
- **Summary Tab**
  - ❖ View prospect or visit information you enter on the Prospects or Visits page of the Visitation module.
  - ❖ On the List page highlight a prospect or visit then click on the Summary Tab. A preview screen displays all entered prospect or visit information. Use the tool bar buttons to view pages, print, email, or export the group summary.
- **Prospects Tab**
  - ❖ Record information about prospective members and to list visits to and from those prospects.
  - ❖ To edit a prospect , highlight the prospect's name in the list on the List page. Go to the Prospects page. Click the edit button on the tool bar. Click the save button when done.
- **Visits Tab**
  - ❖ Record specific details about visits with prospective members.
  - ❖ To edit visit information, highlight the visit in the list on the List page. Go to the Visits page. Click the edit button on the tool bar. Click the save button when done.

- **Reports Tab**
  - ❖ Displays any reports that you have already created for a particular prospect of visit.
  - ❖ Select a report from the Report field on the Report page tool bar. Use the Select option and date range option for your report. Use the tool bar buttons to view pages, print, email, or export the prospect or visit report.

Member Notes (Standard and Deluxe)

You can access the Member Notes module from the Members submenu under the Modules menu.

- **List Tab**
  - ❖ A list of all the members for which you have entered notes. Use this page to locate a member to view notes.
  - ❖ To add a new member note, click the add button on the tool bar. To edit a member note, highlight the member's name in the list on the List page. Click the edit button on the tool bar. Membership Plus will move to the Data Entry page. Click the save button when done.
- **Summary Tab**
  - ❖ View member note information you enter on the Data Entry page of the Members Note module.
  - ❖ On the List page highlight a member then click on the Summary Tab. A preview screen displays all entered notes information. Use the tool bar buttons to view pages, print, email, or export the note summary.
- **Data Entry Tab**
  - ❖ Is divided into three sections: note category tree view, history list grid, and note pane. All notes you've entered for a particular member are listed in the history list grid. The text of the note selected in the history list appears in the note pane.
  - ❖ Click on the add, edit, save tool bar buttons to enter or modify note information. Select a note category from note category tree view.
- **Reports Tab**
  - ❖ Displays any reports that you have already created for a particular member note.

- ❖ Select a report from the Report field on the Report page tool bar. Use the Select option and date range option for your report. Use the tool bar buttons to view pages, print, email, or export the member note report.

- **Transfer Data Tab**
  - ❖ Allows you to export or import information to other locations/programs and synchronize information between Membership Plus and Microsoft Outlook.
  - ❖ Click on one of the option buttons at the top of the page. The page changes for each button. Follow the instructions on the page. Use the buttons at the bottom to navigate through the exporting, importing, or synchronizing processes.

Member Pictures (Standard and Deluxe)

You can access the Member Pictures module from the Members submenu under the Modules menu.

- **List Tab**
  - ❖ Displays a list of all of the members that you have entered.
  - ❖ To add a new member picture, click the add button on the tool bar. To edit a member picture, highlight the member's name in the list on the List page. Click the edit button on the tool bar. Membership Plus will move to the Data Entry page. Click the save button when done.
- **Data Entry**
  - ❖ Add, edit, or view member pictures on this page.
  - ❖ Use the add, edit buttons at the bottom of the page to add or modify member pictures. Clicking the add button opens a browser so you can locate the member's picture. Clicking the edit button opens the Image Editor for you to make picture adjustments.

Financial Modules

Contributions (Standard and Deluxe)

- **List Tab**
  - ❖ Record and view information about contributions made to your organization by its members.
  - ❖ To add a new contribution, click the add button on the tool bar. To edit a contribution, highlight the contribution in the list on the List page. Click the edit button on the tool bar. Enter new or modified information. Click the save button when done.
- **Summary Tab**
  - ❖ View contribution information you enter on the Data Entry page of the Contributions module.
  - ❖ On the List page highlight a contribution then click on the Summary Tab. A preview screen displays all entered contribution information. Use the tool bar buttons to view pages, print, email, or export the contribution summary.
- **Reports Tab**
  - ❖ Displays any reports that you have already created for a particular contribution.
  - ❖ Select a report from the Report field on the Report page tool bar. Use the Select option and date range option for your report. Use the tool bar buttons to view pages, print, email, or export the contribution report.

Deposits (Standard and Deluxe)

- **List Tab**
  - ❖ Displays a list of all of the deposits that you have entered.
  - ❖ To add a deposit, click the add button on the tool bar. To edit a deposit, highlight the deposit in the list on the List page. Click the edit button on the tool bar. Membership Plus will display the Deposit Wizard. Click the save button at the bottom of the page when done.

- **Summary Tab**
  - ❖ View deposit information you enter in the Deposit Wizard of the Deposits module.
  - ❖ On the List page highlight a deposit then click on the Summary Tab. A preview screen displays all entered deposit information. Use the tool bar buttons to view pages, print, email, or export the deposit summary.
- **Detail View Tab**—displays basic or summary information about each deposit.
- **Contributions Tab**—shows details of the contributions that make up the deposit.
- **Reports Tab**
  - ❖ Displays any reports that you have already created for a particular deposit.
  - ❖ Select a report from the Report field on the Report page tool bar. Use the Select option and date range option for your report. Use the tool bar buttons to view pages, print, email, or export the deposit report.
- **Export Tab**
  - ❖ Shows information about exporting the deposit to the linked accounting package (MoneyCounts, Quicken, or QuickBooks). Be sure to select financial program to export to in Program Properties.
  - ❖ To export a deposit, select a deposit on the List page to export. Click on the Export Tab. Click the export button.
- **Undeposited Contributions Wizard**—Use the Undeposited Contributions/Deposit Wizard window to create deposits and to view undeposited contributions, filtering by batch and/or date, if desired.

Pledges (Deluxe)

- **List Tab**
  - ❖ Displays a list of all of the members that you have entered.
  - ❖ To add a pledge, click the add button on the tool bar. The Select Fund dialog appears. Select a fund for the pledge, and click OK. The Data Entry page will display. Enter your new pledge and click the save button on the tool bar when done.

- To edit a pledge, highlight the pledge in the list on the List page. Click the edit button on the tool bar. Membership Plus will display the Data Entry page. Click the save button on the tool bar when done.

- **Summary Tab**
  - View pledge information you enter in the Data Entry page of the Pledges module.
  - On the List page highlight a pledge then click on the Summary Tab. A preview screen displays all entered pledge information. Use the tool bar buttons to view pages, print, email, or export the pledge summary.
- **Data Entry Tab**—add, edit, or view each member's pledge information for a given year is shown on a single screen; you can move from year to year to enter or view the member's current, past, and future years' pledges.
- **Reports Tab**
  - Displays any reports that you have already created for a particular pledge.
  - Select a report from the Report field on the Report page tool bar. Use the Select option and date range option for your report. Use the tool bar buttons to view pages, print, email, or export the pledge report.

Funds (Standard and Deluxe)

- **List Tab**
  - Displays a list of all of the funds that you have entered.
  - To add a fund, click the add button on the tool bar. To edit a fund, highlight the fund in the list on the List page. Click the edit button on the tool bar. Membership Plus will display the Data Entry page. Click the save button on the tool bar when done.
- **Data Entry Tab**—allows you to enter the Fund name as well as the account number for the fund. Plus, you can link Membership Plus funds to Membership Plus accounts.
- **Reports Tab**
  - Displays any reports that you have already created for a particular fund.

- ❖ Select a report from the Report field on the Report page tool bar. Use the Select option and date range option for your report. Use the tool bar buttons to view pages, print, email, or export the fund report.

Banks (Standard and Deluxe)

- **List Tab**
  - ❖ Displays a list of all of the banks that you have entered.
  - ❖ To add a bank, click the add button on the tool bar. To edit a bank, highlight the fund in the list on the List page. Click the edit button on the tool bar. Membership Plus will display the Data Entry page. Click the save button on the tool bar when done.
- **Data Entry Tab**—view, enter or edit information for each bank record.

Contributions@Home (Standard and Deluxe)

Contributions@Home gives you the flexibility of taking a subset of a data set home where you can add contributions and member to it. Then you can bring it back to the church and merge the subset into the full data set. See Membership Plus Help on how to use this feature.

Accounting Modules (Deluxe)

Note: The Accounting modules are available only in Membership Plus Deluxe. See Membership Plus Finance and Fund Account manual and Membership Plus Help for more details on how to use the Accounting modules.

Schedule Modules

Meetings (Deluxe)

- **List Tab**
  - ❖ Displays a list of all of the meetings that you have entered.
  - ❖ To add a meeting, click the add button on the tool bar. To edit a meeting, highlight the meeting in the list on the List page. Click the edit button on the tool bar. Membership

Plus will display the Data Entry page. Click the save button on the tool bar when done.

- **Summary Tab**
  - ❖ View meeting information you enter in the Data Entry page of the Meetings module.
  - ❖ On the List page highlight a meeting then click on the Summary Tab. A preview screen displays all entered meeting information. Use the tool bar buttons to view pages, print, email, or export the meeting summary.
- **Data Entry Tab**
  - ❖ Add new meeting information or edit existing meeting information. Enter everything from meeting name and place to tracking attendance and scheduling rooms and equipment.
  - ❖ Click on the add, edit, save tool bar buttons to enter or modify meeting information.
- **Calendar Tab**—offers three options on how to view scheduled meetings entered on the Data Entry page. You can use either the 3-day view, the week view, or the month view.
- **Reports Tab**
  - ❖ Displays any reports that you have already created for a particular meeting.
  - ❖ Select a report from the Report field on the Report page tool bar. Use the Select option and date range option for your report. Use the tool bar buttons to view pages, print, email, or export the meeting report.
- **Transfer Data Tab**
  - ❖ Allows you to export information to other locations/programs and synchronize information between Membership Plus and Microsoft Outlook.
  - ❖ Click on one of the option buttons at the top of the page. The page changes for each button. Follow the instructions on the page. Use the buttons at the bottom to navigate through the exporting or synchronizing processes.

Auto Tasks (Deluxe)

Use Auto Tasks set up specific follow-up tasks to occur automatically in Membership Plus based on certain actions that happen in the program. See Membership Plus Help for more information on this feature.

Event Registration (Deluxe)

- **List Tab**
  - ❖ Displays a list of all of the events that you have entered.
  - ❖ To add an event, click the add button on the tool bar. To edit an event, highlight the event in the list on the List page. Click the edit button on the tool bar. Membership Plus will display the Data Entry page. Click the save button on the tool bar when done.
- **Summary Tab**
  - ❖ View event information you enter in the Data Entry page of the Event Registration module.
  - ❖ On the List page highlight an event then click on the Summary Tab. A preview screen displays all entered event information. Use the tool bar buttons to view pages, print, email, or export the event summary.
- **Data Entry Tab**
  - ❖ Add new event information or edit existing event information. Enter everything from event name, event attendees, and event tasks to scheduling rooms and equipment.
  - ❖ Click on the add, edit, save tool bar buttons to enter or modify event information.
- **Calendar Tab**—offers three options on how to view scheduled events entered on the Data Entry page. You can use either the 3-day view, the week view, or the month view.
- **Reports Tab**
  - ❖ Displays any reports that you have already created for a particular event.
  - ❖ Select a report from the Report field on the Report page tool bar. Use the Select option and date range option for your report. Use the tool bar buttons to view pages, print, email, or export the event report.

- **Transfer Data Tab**
    - ❖ Allows you to export information to other locations/programs and synchronize information between Membership Plus and Microsoft Outlook.
    - ❖ Click on one of the option buttons at the top of the page. The page changes for each button. Follow the instructions on the page. Use the buttons at the bottom to navigate through the exporting or synchronizing processes.

Calendar (Deluxe)

- **List Tab**
    - ❖ You can view all the calendars that you have created.
    - ❖ Load—This button allows you to load items from the following modules: Meetings, Events Registration, Room/Equipment, Visitation, and Members.
    - ❖ Display—This button allows you to display certain functions through out the calendar module, such as, item times (Week, Month Views), Appointment Colors (Day Views), and Completed tasks (on completed dates).
    - ❖ To add a calendar, click the add button on the tool bar. The New Calendar dialog appears listing two options for creating calendars: a calendar wizard or manual. For more information on using the calendar wizard or creating one manually, see Membership Plus Help.
    - ❖ To edit a Calendar, highlight the calendar in the list on the List page. Click the edit button on the tool bar. Membership Plus will display the Properties page. Click the save button on the tool bar when done.
- **Properties Tab**—This tab will allow you to view, add, edit the name of a calendar, a password to protect it and show reminders in Membership Plus QuickView and on the Welcome screen when an event is or will be occurring.
- **Day View Tab**—This will show you what is going on during one specific day.
- **Multi-day View Tab**—This will show you what is going on during three specific days.
- **Week View Ta**b—This will show you what is going on during a specific week.

- **Month View Tab**—This will show you what will be happening during a specific week.
- **Reports Tab**
  - ❖ This will show any reports that have been created for the calendar that you are viewing. All calendar reports can be displayed in portrait or landscape view.
  - ❖ Select a calendar from the Report field on the Report page tool bar. Select the date range for your calendar. Use the tool bar buttons to view pages, print, email, or export the calendar.
- **Transfer Data Tab**
  - ❖ Allows you to export calendar information to Calendar Creator and synchronize information between Membership Plus and Microsoft Outlook.
  - ❖ Click on one of the option buttons at the top of the page. The page changes for each button. Follow the instructions on the page. Use the buttons at the bottom to navigate through the exporting or synchronizing processes.

Rooms & Equipment (Deluxe)

- **List Tab**
  - ❖ Displays a list of all of the events that will be using rooms and/or equipment.
  - ❖ To add an event, click the add button on the tool bar. To edit an event, highlight the event in the list on the List page. Click the edit button on the tool bar. Membership Plus will display the Data Entry page. Click the save button on the tool bar when done.
- **Summary Tab**
  - ❖ View event information you enter in the Data Entry page of the Room/Equipment module.
  - ❖ On the List page highlight an event then click on the Summary Tab. A preview screen displays all entered event information. Use the tool bar buttons to view pages, print, email, or export the event summary.

- **Data Entry Tab**
  - ❖ Add new event information or edit existing event information. Enter the event and schedule rooms and equipment.
  - ❖ Click on the add, edit, save tool bar buttons to enter or modify event information.
- **Calendar Tab**—offers three options on how to view scheduled events entered on the Data Entry page. You can use either the 3-day view, the week view, or the month view.
- **Reports Tab**
  - ❖ Displays any reports that you have already created for a particular scheduled event.
  - ❖ Select a report from the Report field on the Report page tool bar. Use the Select option and date range option for your report. Use the tool bar buttons to view pages, print, email, or export the event report.
- **Transfer Data Tab**
  - ❖ Allows you to export information to other locations/programs and synchronize information between Membership Plus and Microsoft Outlook.
  - ❖ Click on one of the option buttons at the top of the page. The page changes for each button. Follow the instructions on the page. Use the buttons at the bottom to navigate through the exporting or synchronizing processes.

Equipment List (Deluxe)

- **List Tab**
  - ❖ Displays a list of all of the equipment that you have entered.
  - ❖ To add equipment, click the add button on the tool bar. To edit equipment, highlight the event in the list on the List page. Click the edit button on the tool bar. Membership Plus will display the Data Entry page. Click the save button on the tool bar when done.
- **Summary Tab**
  - ❖ View equipment information you enter in the Data Entry page of the Equipment List module.

- On the List page highlight an event then click on the Summary Tab. A preview screen displays all entered event information. Use the tool bar buttons to view pages, print, email, or export the event summary.

- **Data Entry Tab**
  - Add new equipment or edit existing equipment information. Enter name, type, description, location, model, serial number, quantity, and purchase and maintenance information.
  - Click on the add, edit, save tool bar buttons to enter or modify event information.
- **Reports Tab**
  - Displays any reports that you have already created for a piece of equipment.
  - Select a report from the Report field on the Report page tool bar. Use the Select option and date range option for your report. Use the tool bar buttons to view pages, print, email, or export the equipment report.

Surveys (Standard and Deluxe)

- **List Tab**
  - This is the default window for the Survey Module and displays a list of all current questionnaires.
  - To add a survey, click the add button on the tool bar. To edit a survey, highlight the survey in the list on the List page. Click the edit button on the tool bar. Membership Plus will display the Survey Setup page. Click the save button on the tool bar when done.
  - To add or a survey category, click the add at the bottom of the List page. To edit a current category, click the edit button at the bottom of the page. To delete a category, click the delete button at the bottom of the page.
- **Printout Tab**
  - Print, email, or export a survey.
  - Use Print Options to determine the size of media to print on, include spaces for generic data points (contact information or age or gender), and how to number your questions.

- **Setup Tab**
  - ❖ Allows you to create a new survey, or edit an existing survey.
  - ❖ For each new survey you can specify name, category, description, opening and ending text.
- **Questions Tab**
  - ❖ Allows you to enter questions for a specific survey.
  - ❖ Click the New button above the Question field. Select Type of question and choose possible answers. When done click the question, click the add next button to enter another question. The first question will be enter into Question # field to the left. Use the buttons at the bottom of this field to set the order of your questions.
- **Enter Results Tab**
  - ❖ Allows you to enter results for a submitted questionnaire into the database.
  - ❖ Highlight the survey on the List page and click the Enter Results tab. Click the New button above the Name field, or click the Load Mbr button to enter member information from the data set. Enter the member's answers to the questionnaire. When done click the add next button to enter another member's answers.
- **View Results Tab**
  - ❖ Displays questionnaire results in a report format.
  - ❖ Select a survey result from the Select Survey Results field on the View Results page tool bar. Use the tool bar buttons to view pages, print, email, or export the equipment report.

Workflow (Standard and Deluxe)

- **List Tab**
  - ❖ Lists of all Workflow Wizards currently setup in Membership Plus.
  - ❖ To add a new workflow wizard, click the add button on the tool bar. To edit an existing workflow wizard, click the edit button on the tool bar. Click the save button on the tool bar when you are finished.

- **Select Steps Tab**
    - ❖ Create Workflow Wizards to combine data entry screens, reports, and data tools into a step-by-step process for easily entering data. Mark the checkboxes of the steps you want to include in your workflow wizard.
    - ❖ Click on the add, edit, save tool bar buttons to enter or modify event information.
- **Set Order Tab**—provide you the ability to specify in what order the steps occur in the wizard. Use the Up and Down arrows to set the order of the steps.

Report Modules

For more assistance with the Report modules, see the Membership Plus Help.

Report Generator (Standard and Deluxe)

Generate reports from your member and financial data. Produce colorful pie, bar, or line graphs. Email reports to any member, group of members, or non-members. Send reports as file attachments, zip files, or directly in body of email.

Quick Letter (Standard and Deluxe)

Use this built-in word processor for correspondence and merge data from your member records to personalize each letter.

- **List**
    - ❖ This tab displays a list of your documents.
    - ❖ To add a new letter, click the add button on the tool bar. Click the Edit Text tab to enter the text of your letter. Click the save button on the tool bar to when you're done.
    - ❖ To edit an existing letter, highlight the letter on the List page and click the Edit Text tab. Click on the letter to make your modifications. Click the save button on the tool bar to when you're done.

- **Edit Text**—This tab allows you to create or change the text of a previous letter.
- **Merge Options**—This tab allows you to decide member type merges, dates ranges, filters, and sort orders of your letters that you would like to merge together.
- **Email Setup**—This tab allows you to set up and send emails through the Quick Letter program and Membership Plus reports.
- **Mail Merge**—This tab allows you to merge letters together for mailing. You can also print, email, or export the letter.
- **Labels/Envelopes**
  - ❖ This tab allows you to create or edit labels and envelopes for mailing.
  - ❖ Labels supports all Avery Label types.
  - ❖ Envelopes supports most common envelope sizes.

Progress Tracker (Deluxe)

- **List Tab**
  - ❖ List of all of the goals that you have entered.
  - ❖ To add a goal, click the add button on the tool bar. To edit a goal, highlight the goal in the list on the List page. Click the edit button on the tool bar. Membership Plus will display the Data Entry page. Click the save button on the tool bar when done.
- **Summary Tab**

  Create a graph to visually follow the progress of your goal. Choose either Overall Goal, Milestones, or Subgoals.

  Select the formatting options for your graph, such as, bar style, labels, colors, legend, and 3-D depth.
- **Data Entry Tab**
  - ❖ Enter the necessary information for the goals you are setting and want to track for your organization.
  - ❖ Add information for the overall goal, milestones, and subgoals. Click the add button on the tool bar to add a new goal. Click the edit button on the tool bar to edit existing goal information.
  - ❖ Use overall goal, milestones, and subgoals panes buttons to enter required information.

- **Projections Tab**—projection analysis shows you what must take place to accomplish your goal.

Pictorial Directory (Deluxe)

- **List Tab**
  - ❖ Displays a list of all of the pictorial directories that you have entered.
  - ❖ To add a new pictorial directory, click the add button at the bottom of the page. On the New Pictorial Directory dialog, enter title and choose a data set. Click OK when done.
  - ❖ To copy a pictorial directory, click the copy button at the bottom of the page. On the Copy Pictorial Directory dialog, enter title and choose a data set. Click OK when done.
- **Reports Tab**—view, print, export, or email the directory.
- **Pictures Tab**
  - ❖ Attach a picture to a member. To add a picture you first must add a member. Use either the add button or the add wizard button above the Member List field. Clicking the add button give you two options: add a member from the data set which opens the Select Member dialog from which you can choose a member's name, and add someone not in the data set which displays the Add Person dialog. Enter that person's name. The Add Wizard gives you step by step instructions on how to add member(s) to the Member List field.
  - ❖ Once the member has been added, use the browse button under File Name section to locate the member's picture.
- **Captions Tab**
  - ❖ Enter captions for your pictures. To add a caption, click the add button on the tool bar. To edit a caption, click the edit button on the tool bar.
  - ❖ Use either the Auto-insert common fields or Manual insert fields to add to your caption or design your own caption.
- **Layout Tab**—make page layout adjustments and print your pictorial directory. Set print options, print orientation, margins, and file export options.

Administration Modules (Standard and Deluxe)

For more information on the Administration modules, see Membership Plus Help.

Program Properties

Program properties are items that affect the way the program behaves or appears. See the Quick Tutorial section of this manual or Membership Plus Help for more information.

Global Search & Replace

The Search & Replace feature provides you with a method to change large amounts of data throughout your data set.

Policies & Procedures

With this feature, you can enter the policies and procedures that your organization follows when entering data into Membership Plus. This information can be helpful to you or others in your organization who work in Membership Plus.

Membership Plus QuickView (Standard and Deluxe)

Membership Plus QuickView is a small application that runs in the background as you work at your computer. It gives you quick access to the member information and calendar events in Membership Plus without the need to launch Membership Plus itself.

To open MP QuickView,

1. Click on the Start button on your computer's status bar.
2. Choose Programs, then choose Parsons, then select Membership Plus, then choose Membership Plus 2007 QuickViewer.
3. To open Membership Plus QuickViewer, click on the MPQuickView icon on the status bar of the Windows desktop.

Additional Documentation

Program Help

This Getting Started Guide is intended to get you started using Membership Plus 2007 for Windows. The primary source of information about using Membership Plus is the Program Help and other features built into the program.

To access Membership Plus Program Help,

1. Go to Help on the Menu bar, using the mouse click on Help.
2. On the drop-down menu, click on either Help Topics or Index. Help Topics will display Membership Plus Help with Table of Contents. Index will display Membership Plus Help with the topic Index.

Click the Help button, if available, or press **F1** to open a Help topic relevant to your location in the program. If the first topic you reach isn't what you want, click the Contents, Index, or Find tabs in the Help window to look up more information using the Help topics dialog.

Internet Help

Visit QuickVerse.com for the latest information and updates covering Membership Plus!

Membership Plus® Support Plans

We have three support plans for Membership Plus designed to provide you with the help you need, when you need it.

Free Support

- 30 Days Free Phone Support from Date of purchase.
- Browse extensive Membership Plus documentation on the Product Support page 24 hours a day, 7 days a week, at: **QuickVerse.com.**
- Free email support (please see the Support web page).

Basic Support

- Free Email Support (please see the Support web page).
- Pay $15.00 per incident.
  - After 30 days from purchase.
  - No charge for subsequent support calls regarding the same incident.
- Data Repair cost are $50 per half hour.

Preferred Support

- Toll-Free Support Phone Number.
- Annual fee of $349.95 for unlimited incidents and calls.
- Discount on future Membership Plus® products and upgrades.
- Preferred Email Support.
- Unlimited Data Repair (normally $100 per hour).
- Support includes Fund Accouting Module.

The Technical Support phone number is 402-333-3075.

Technical Support Hours

- 8:00 am to 6:00 pm Monday through Thursday
- 8:00 am to 5:00 pm Fridays

Multi-User Pricing

Please call us at 888-459-3463 for special multi-user pricing!