MemberTies

Software User's Guide

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This user's guide is a copy of the Help system available within the MemberTies and MemberTies Professional software system.

This guide covers the usage of the standard and professional versions of the software. Unless noted otherwise, all information applies equally to both versions.

MemberTies Help

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Publisher

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Writers

Van Sederburg
Teresa Wu

Editor

Teresa Wu

About the Software:

MemberTies was conceived in 1998 as a software solution for a social club that needed a more efficient way to manage their growing membership.

The software was originally released under the name "MemberTracks." The name "MemberTies" came about as a result of users who praised the system as, "software that finally let us tie everything about our club together in one place."

The software was divided into a standard and professional version a few years later, and has since come to be relied upon by thousands of users in 21 countries around the world.

We would like to thank all of our loyal users, some of whom have been with us since the original version 1.0 in 1998. Without your suggestions and support, none of this would have been possible.

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Part I

Welcome!

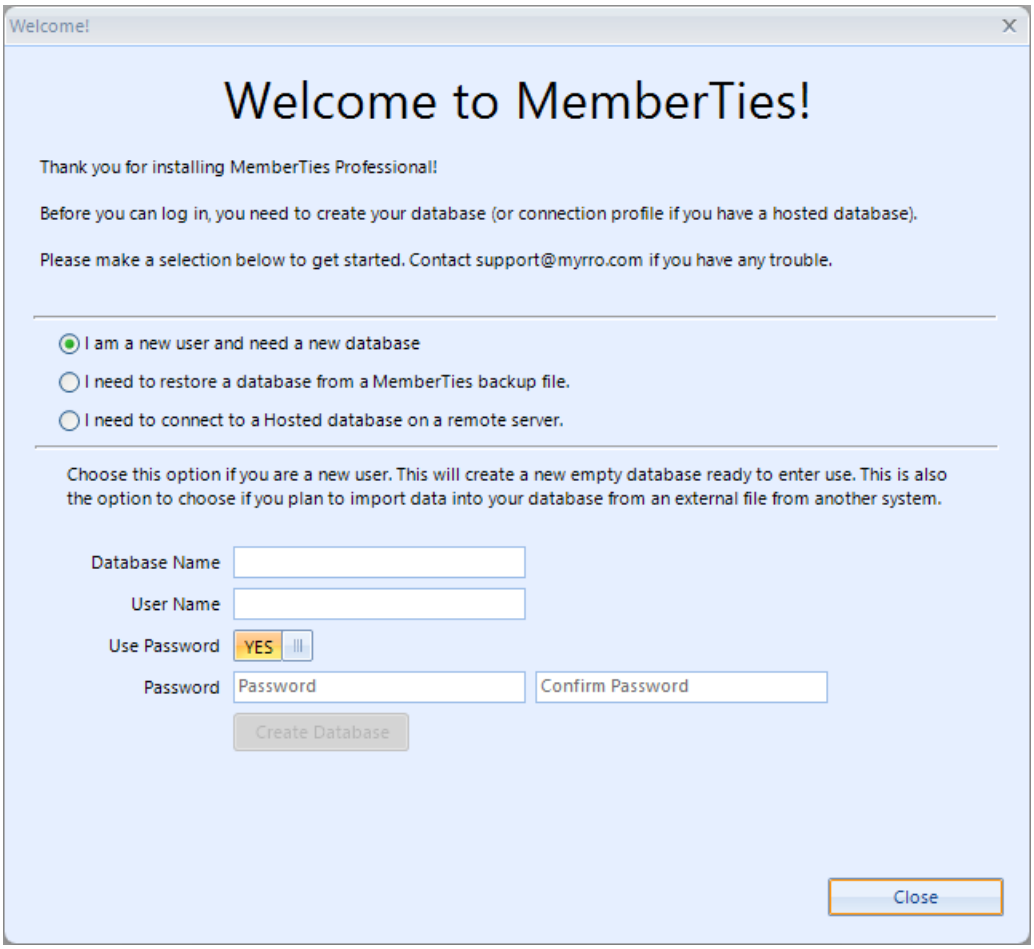
1 Welcome!

MemberTies is a membership tracking application designed to help you get your group organized and keep it organized. Extensive features, many based on suggestions from users around the world, all combine to give you the one of the most powerful, affordable, and comprehensive membership software packages available.

This help topic is designed to help you get started using MemberTies as quickly as possible.

When you start the program, you should see either a Welcome window, or a Login window.

Welcome window



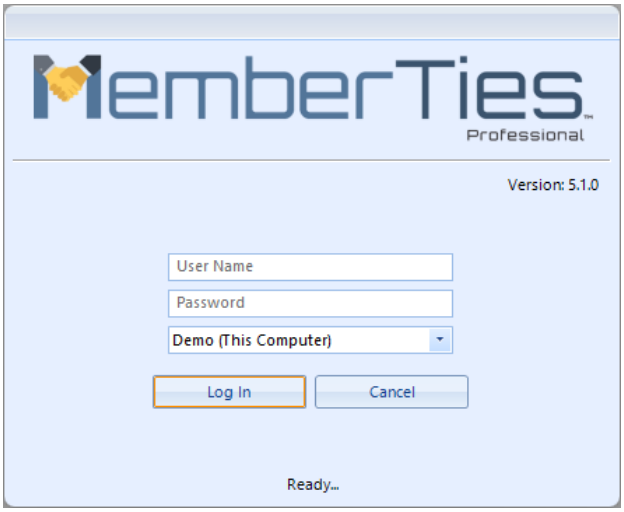
The Welcome window appears if the system doesn't see any databases to use. If you think you should already have a database on your computer, read this.

If you're a new user, please see:

- I'm a new user and I just installed for the first time

Once you are logged in, have a look at the topics under Getting Started to get up and running quickly.

Login window



The Login window appears when the system finds at least one database in the expected location.

- I've just upgraded or reinstalled
- I'm an existing user and need to log in again

Note: The system will normally set the User Name and Database fields to the last user and selected database.

This document was last updated on February 23, 2024.

Part II

Firewall/Antivirus Notice

2 Firewall/Antivirus Notice

Initial Startup Issues

If you are using a firewall or antivirus software with a firewall component, you may receive a warning the first time you start the system. The warning will probably indicate that a program called mtmysqld.exe is attempting to connect to the internet or a network, and it will offer to block the program.

Do not block this program! The program it is referring to is the MemberTies database server, and it is part of the software installed on **your** computer. It is NOT on the internet like the message may imply.

If you block the program, the system will not be able to start or connect to any database. You should respond to the warning by telling it to **allow** this program to run, because you need the database server to run.

The warning appears because the database server installed on your computer uses the IP address of your computer (localhost) to identify itself. No internet connection is being made, but since the firewall or anti-virus monitoring software notices the use of this address, it may display a warning. Unfortunately, the default "recommended" action is often to block the program, which is the wrong solution in this case.

If you have already blocked the program, the only solution is to open your firewall or anti-virus settings, find the list of blocked programs, and change it to be "allowed."

Part III

Standard Version Overview

3 Standard Version Overview

MemberTies is designed to do much more than track basic contact information. It is a powerful database system that will help you take control of all the information that is critical to the operation of your organization. For example:

- Membership Types - Most organizations are made up of many members, and each member is assigned a particular status that designates the type of membership the person holds. MemberTies ships with a predefined set of statuses, but also allows you to add to them, or delete them all and define your own. So regardless of whether your organization has statuses like Family and Single or more generic terms like Prospect and Regular, MemberTies will let you set up exactly what you need. In addition, the system will automatically migrate members from one status to another (for example, from active to alumni) using "expiration behaviors" (i.e., when the End Date is reached).

- Dues Payments - Though not designed as a complete accounting package, you are able to track dues payment information for your membership. With the standard version, you can enter any number of dues payments for each membership record, including the amount and date paid, the membership status purchased, a check/payment number, and additional comments. Once you have set up your dues information, you can also use the Dues Calculator to figure the amount of dues owed for a given status for a given month.

  If you are using MemberTies Professional, you have many additional dues features, including automatic posting of interest charges or other scheduled fees, mass posting or deleting of dues amounts, and the ability to create debit or credit dues "posting types" such as "payment", or "interest" or more specific types, like "T-Shirt" or "Bar Sales." Several additional reports are available in the professional version as well.

  MemberTies Professional also provides a separate Donations tracking area for each member by adding a Donations tab next to the Dues tab. Posting types (as mentioned above) are identified as specific to donation or dues entries, and are only available on the appropriate page. This enables you to keep your donations entries separate from dues entries, making it easy to "zero balance" the dues account while letting a member's donations total continue to grow.

- Associated Members and Groups - If you need to remember that a link of some kind exists between two different records, you can track it on the Associated tab. Associated members are might be golf partners, mentors, referring members, and spouses who are also members. Associated Groups might be committees, book clubs, or softball teams.

- Friends and Family Members - These records are not "members" of the organization, but instead are considered "part of" or subordinate to a main member record. These would be children, non-member spouses, friends who are guests occasionally, etc. It is possible for Friend/Family members to be checked-in to an activity, and they can have their own ID number if you do not want them to share the number of the main member record.

- Assigned Items - If your organization recognizes members for their achievements, tracks offices or positions held, or just needs to know when someone was involved in a particular type of activity, you can record it using membership or group Items. Items are used as a generic way of describing all of the things your members can be involved in (i.e., roles and achievements). You can create distinct item categories, such as Member Achievements or, Offices, and then assign items to those. For example, in the Offices category, you might create items of President and Vice President. Then you could assign the Offices/President item to the person who held that position, and use date and comment fields to indicate the year they were in office, etc. Items and Item Categories can be used very creatively! We refer to them as "one to many" records, meaning one member can have the same Item *many* times.

- Activities - Most organizations would not exist without activities. An activity might be a business meeting, a movie review, a sporting event, a fund-raising event, a committee, or anything else that involves member participation. The software enables you to create any number of activities, complete with start and end date and time, comments, description, and location.

  The professional version expands on activities by enabling you to assign members as attendees, track associated activity income and expenses, check members in and out, and more.

- To Do Lists - Every organization has things that need to be done. Sometimes the To Do is related to a specific member; other times it is more generic. Sometimes you (the user of MemberTies) needs a reminder just for yourself. The To Do List feature enables you to track To Do items for any member or group record, or for yourself. You can print your outstanding To Do list, display future items, and of course, mark them as done as you complete them.

- Groups - A group is simply a sub-division of your membership. Members can belong to any number of groups. A group could be a committee, another organization, a team, a list of sponsors, or anything that multiple members have in common. Groups also make it easy to run reports based on group membership, or email everyone in the group (with the professional version).

- Reporting - No membership system is complete without reports, so MemberTies provides a full suite of predefined reports, including rosters, mailing labels, dues payments, statistics, birthday lists, contact lists, individual member and group reports, and more. Many reports can be customized to show only certain membership statuses, dates, assigned item, etc., or can be restricted to limit membership records to those assigned to a specific group. Reports always remember the last search criteria that was used, and you can also save searches for easy reloading in the future.

- Importing Data - To help you transition from your old system, MemberTies enables you to import existing information. Just save your existing data to a delimited text file, and you're ready to map each of your existing fields to fields in MemberTies! All data to be imported is displayed for you before it is sent to the database, so you will know exactly what is about to happen.

- Protecting Your Data - All data is stored in the database, and full backup and restore options are included within the program using the Database Toolkit. MemberTies will automatically prompt you to backup the database at the interval you specify, or leave you alone to do it manually.

MemberTies Professional

If your organization needs even more flexibility, consider upgrading your installation to the Professional version.

Getting Started

For instructions on the best way to get started using MemberTies, please see Initial Setup . This section will walk you through the basic setup of default values, statuses, and other information.

Help

This help is available from any window in the program by pressing the F1 key.

Part IV

Professional Version Overview

4 Professional Version Overview

MemberTies Professional is the version reserved for more powerful features that may not be needed by the average organization. These features typically involve increased control over certain functions of the software, or features that may only apply to larger organizations.

The feature list restricted to MemberTies Professional will continue to grow, and of course, the professional version will always include all the features of the standard version. For general information about the standard version, see Standard Program Overview

Some key additional features in the professional version include:

- User-Definable Views - In the standard version, there is a predefined membership list, activity list, and group list. These are known as *Views*. With the professional version, you can define as many different views of your data as you wish. If you need a membership list that includes Name, Email Address, and various Custom Fields, you can create a new View using those fields, put the fields in the order you want them, change the column heading text, the default sort order, and the column size. Switching between different views is easy, and you can also make one view the default that opens automatically.

  Each view can serve as a user-defined export template. You can retrieve data into the list, apply the View you want, and then click Export to save the data to a PDF, text file or other format.

- User-Definable Mailing Labels - If the predefined labels available in the standard version aren't quite what you want for your mailings, the professional version lets you set up your own labels. You can choose the type of data, choose the fields that will be on each row of the label, size them, and even add prefix or suffix data to any field. These labels can then be opened in the normal Reports window, where they run like a normal report.

- Other User-Defined Reports - Similar to the Mailing Labels above, you can also create roster reports, multi-column reports, name tags, post cards, and photo cards. With like other reports, you choose the type of data, pick the fields you want, arrange them in the order you like, change the heading text, select the sort order, size the columns, and give the report a default title. These reports can then be opened on the normal Reports window, where they run like a normal report.

- Customized Dues Posting Types - In the standard version, every entry in the Dues tab of a membership record is considered a dues payment (a credit to the account balance). The idea was simply to provide a means of knowing how much a given member had paid the organization over the years. With MemberTies Professional, you get to decide how to treat every entry. You can set up any number of Posting Types, deciding whether they will affect the account as a debit or credit, what the minimum and maximum amount allowed is, and more. Then, when posting dues entries, you can choose the posting type, and the entry will affect the account balance appropriately. If you want to keep accounts current at a 0.00 balance, you can do so by posting a dues charge (debit) of $50.00, and following it with a dues payment (credit) of $50.00, bringing their balance to zero. (You can also set up your Statuses so dues are charged

automatically, so all you need to do is enter the payments. In addition, you can use the Interest feature (see below) to tell the system to automatically post interest to accounts with an outstanding balance.

- Post Dues to Multiple Records at Once - You can post a dues entry to a large number of records without having to open each record and add an identical entry! For example, you may have a special event, and everyone attending that event is part of one activity. You could search for all members in that activity, and then post a one-time charge to all of their dues accounts. With this feature, you can just select all those records on the Membership List, click Add Postings, enter the information, and select to post the entry to every selected record.

- Post Interest Charges Automatically - If your organization collects Interest charges on accounts with an outstanding balance, this feature will take care of the tedious task of posting charges to the appropriate accounts. By entering an Interest Charge on a given Status, you can tell the system to post charges on a daily, monthly, or yearly basis. You specify the annual percentage rate, a minimum amount due, and the compounding period, and the software takes care posting any applicable charges each time you log in.

- Post Dues Charges of any kind Automatically - You can also set up your Statuses to automatically post any kind of dues posting to members of that status. This enables you to charge an automatic monthly fee on the 15th of each month, and/or a yearly fee on the 1st of January, or even a one-time fee on a specific date.

- Group Dues - Dues postings are available on Group records, and are supported for deposits, mass posting, etc., just like membership dues.

- Additional Dues Reports - With the expansion of Dues functionality, some new reports were needed. Therefore, the Dues Account Statement, Dues Postings, and Dues Balance reports have been added. The account statement is designed to be sent to your members, and can include a remittance advice to be returned with payment; and the various posting reports can be used to help reconcile your accounts, check what you posted that day, etc.

- Multiple Addresses - Each member and group record can have an unlimited number of addresses, with one address set as the Current (active) address.

- Predefined Address Types - Predefine a list of address types like PO Box, Home, Work, University, etc., to help ensure that records have consistent naming. Address Types can also be used as report criteria to further control the records returned. For example, you could print all members with PO Boxes, regardless of whether the PO Box address was the current active address.

- Address Date Ranging - Specify optional date ranges within which each address is valid throughout the year. The system will automatically make the appropriate address current each time you start the system (great for summer/winter home members, to ensure that mailings go to the right location at any time of the year).

- Stored Comments - To make comments more consistent and easier, you can store a list of comment texts that can be displayed and inserted on any comments field. If you seem to always open a record and type "Called for information about us.", you can store that text once and then quickly enter it whenever necessary.

- Preloaded Member IDs - If your organization assigns member IDs from a pool of predefined values, or you just want to predetermine the next ID used by the system when creating new records, this feature will help. This enables you to load any number of member IDs into a list (either manually or by importing from a text file), and even control whether they are immediately available or not.

- Associate Members or Income and Expenses to Activities - The Activities functionality is expanded to enable associating membership records to the activity, including the role and status of the member with regard to the activity, as well as related income and expense posting.

- Integrated Email Capability - Send email directly from MemberTies. Easily send mail to all members of a group, all attendees of an activity, a specific member or group, or any number of selected members or groups. The system will send out a personalized email to each person in the list, addressed only to that person. No more long and unprofessional "TO" and "CC" lists, or hidden "BCC" lists are necessary (though you can still do that if you wish).

Upgrading

For more information about MemberTies Professional, please visit https://www.myrro.com/memberties or contact support . Please note that a license issued for the standard version of MemberTies will not work with MemberTies Professional, but an upgrade price is available for users changing versions.

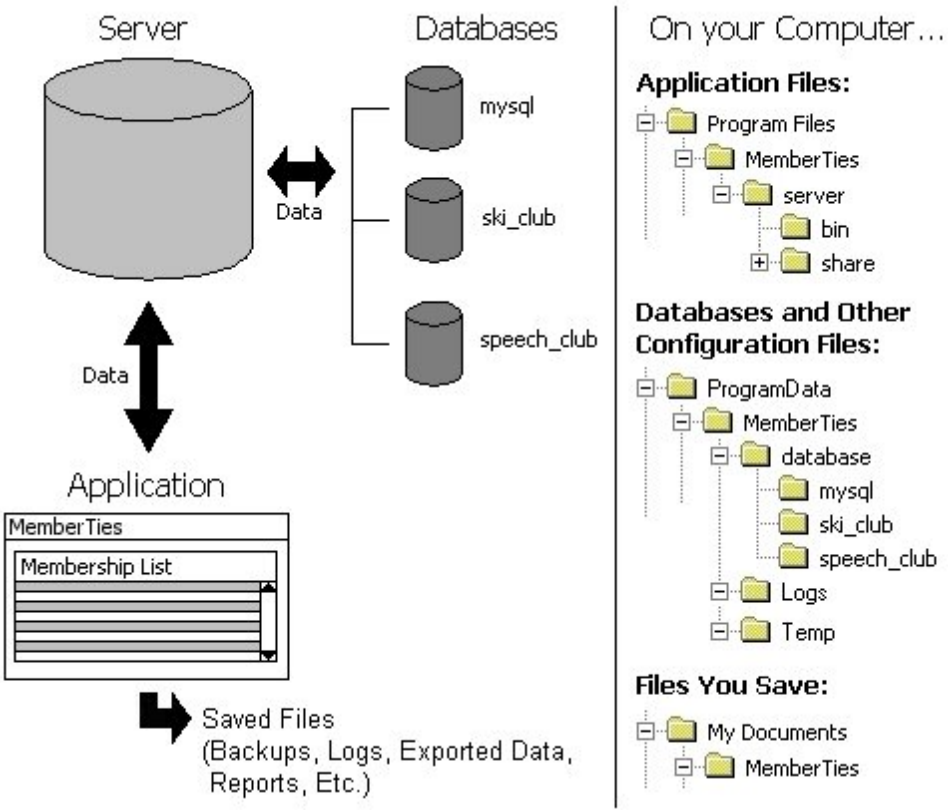
Part V

Server and Database Overview

5 Server and Database Overview

This topic is designed to provide an informational overview of the entire database system that is MemberTies. You don't absolutely have to understand everything to this level of detail in order to use the system, but we wanted to provide the information in case you were interested.

It's easy to think of MemberTies as just a single piece of software -- that what you see on screen when you're entering data is all there is -- but that isn't the whole picture. The following diagram illustrates the three major components of the system: the Server, the Databases, and the Application. The typical corresponding folder structure is also shown for reference.



What it all Means

A simple way to understand the relationship between the database, the server, and MemberTies is to think of it like a bank. Think of your database as the bank vault. Your data is like money in that vault. When you want to put money into the vault you have to request the services of an employee at the bank. That employee is the server -- moving money (data) back and forth between you (MemberTies) and the vault (the database).

The Server

It is a common misconception that any reference to a "server" is always a reference to something on the Internet or to a whole other computer somewhere. That can be true at times, but often a server is nothing more than another small program that runs on your computer. With MemberTies, that is also the case; the server is the program that lets MemberTies move data in and out of your database.

The server program files reside in a "Server" folder, located in the folder where MemberTies is installed. The location is typically, c:/program files/MemberTies/server/. Inside that folder are various other folders containing the files required to start and run the server. You shouldn't ever have to touch anything in these folders. In fact, doing so could actually prevent the server from starting at all, thereby preventing access to any database.

The server has several important jobs to do:

- Track all databases
- Listen for and track all connections to the databases
- Manage the flow of data between MemberTies and the appropriate database, and maintain all the tables in the database as they change with the data

As you can see, the server can be very busy. Every time the application wants to view or update information in the database, (for example, when you open a membership record), the server has to receive the request for data, open the appropriate table(s), get the data, and send it back to the application so it can be formatted for display. When you run a query for 1,000 records, the server has seen them all before they ever appear on the screen.

Note that you won't see a special window on-screen when the server is running. The server is a program that runs invisibly in the background, content to simply manage the flow of data between the database and the application. You can tell it is "out there" if you open the Windows Task Manager and look for a process called "mtmysqld.exe". The server program takes up very little memory, and will continue to run even after you shut down MemberTies. This is done so the next time you start MemberTies it will be faster, because it won't have to bother starting the server again. When MemberTies isn't running, the server will be content to just sleep and do nothing. If you need to check the status of the server, or shut it down manually for some reason, you would use the Server Utility, a separate program installed and available for this purpose.

The Database

The database is not a single file. instead, each database is comprised of a large number of files within a single folder bearing the database name. The database folders are located, appropriately enough, in a "database" folder in a special folder in Windows where applications are allowed to make changes, namely, ProgramData. This location is typically, c:/ProgramData/MemberTies/database/(database name)/. There are lots of files inside that folder, representing the various tables within the database.

MemberTies enables you to have any number of databases, each of which will have its own folder under the Database folder. The system keeps track of the "friendly" database name (the profile name), and other details in a special file called Enter value. This file is updated

when you create or modify database profiles, and is primarily used on the Login window to load the database list.

The Server also maintains a couple of small databases of its own. One is called "mysql" and it is used by the server track permissions, connections, and other internal settings. The other is called "performance_schema", and it is used to help the database run efficiently. This means that you will always have at least three databases: your own, and the server's two databases.

Also in the MemberTies folder are sub-folders called Temp and Logs. The Temp folder is used as a place to create and delete files that are only used for a short while as the server goes about its business. These might be temporarily created image files, tracking files, documents in progress prior to saving, etc. The Logs folder contains all of the logs that are generated within MemberTies. These include email logs, backup logs, etc.

Anti-Virus Software

Database files should ONLY be managed by the server. Opening a file using a text editor or word processor can corrupt the file, causing all of the data to be lost. It is impossible to edit data by modifying these files directly. If you run an anti-virus program on the computer that hosts the server, it is a very good idea to make sure it excludes checking on everything in the database folder. The files there are non-executable text files anyway, so they are not virus threats. Most importantly, if your anti-virus software watches and scans every file in "real time" as it opens and closes, that could mean it is constantly scanning every database file as they open and close. That can dramatically hurt system performance.

The Application

The application is what you probably think of as MemberTies itself. It's the collection of windows, menus, buttons, reports, etc., that you use to view and manage all of your data. Essentially, the application is what simplifies the process of working with a complicated database on a day to day basis. Imagine if you had to type out complicated commands for every record you wanted to see, and then more commands to change the data, and still more commands to see the results again. It's much more convenient type data in fields and click a button to save!

When you start MemberTies, the first thing it does is make sure that the server has been started. Then, when you enter user name, password, and database choices on the Login window, the application forwards those selections on to the server. The server verifies that, 1) there really is a user with the name you entered, 2) that the user by that name is allowed to log in to the database you specified, and 3) that the password is correct. If anything isn't right, the server responds with an error, which the application then displays for you to see.

Part VI

Contacting Support

6 Contacting Support

You are free to contact the support group at Myrro International for any reason. While this may seem like a small benefit, remember that you are probably going to be reaching the person or persons who programmed the software and wrote all the help directly -- not a low-level support person hired last week, or worse, a marketing representative in a huge corporation.

Your concerns or comments are always important and you will receive a very prompt response.

Some common reasons to contact support are:

- To suggest an enhancement or new feature (it's really nice to see your own suggestion appear in the newest release!)
- To request to be included in the next beta-testing program
- To report an error in the documentation
- To report a bug (a problem) in the software
- To discuss the registration process
- To discuss funding immediate development of a major new feature

Contacting Info

Current contact information is always on our website at:
https://www.myrro.com/memberties

Part VII

Getting Started

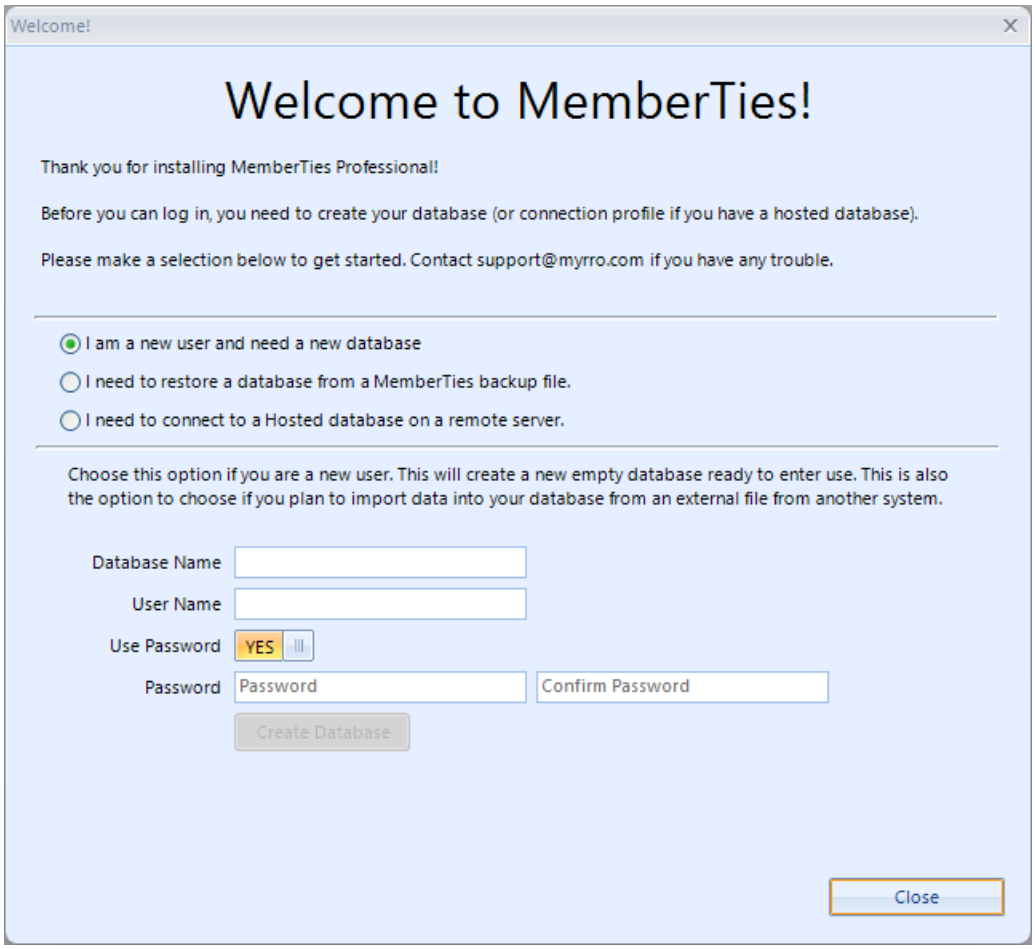
7 Getting Started

7.1 Logging In

7.1.1 Welcome Window (new install)

When you start MemberTies the first time after a new installation, the system will notice that there are no databases on your computer (at least not where it expects to find them) and a Welcome window will display to find out what you want to do.

Note: If you are running any sort of firewall or antivirus software on your computer, read this.

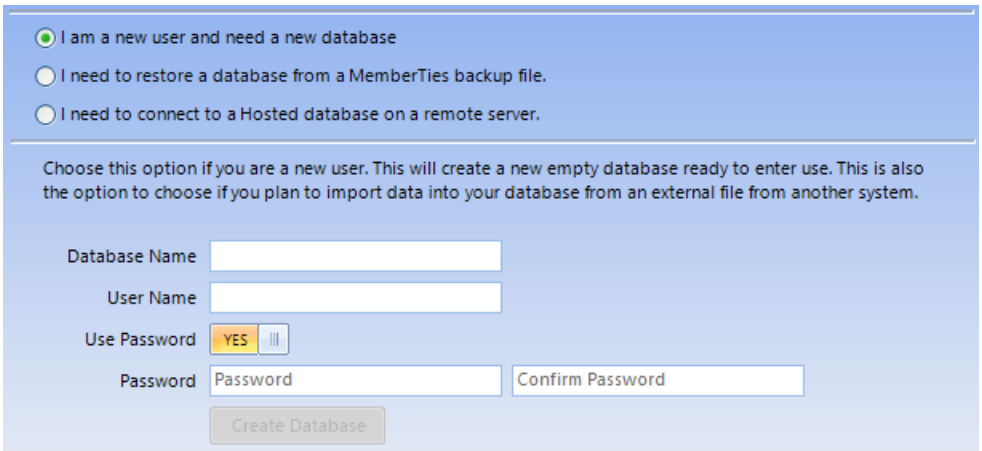


Again, this Welcome window only appears instead of the Login window if the system cannot find any databases.

The option you select depends upon what you need to do:

Create a New Database

Choose the option: *I am a new user and need a new database*



Complete the following fields:

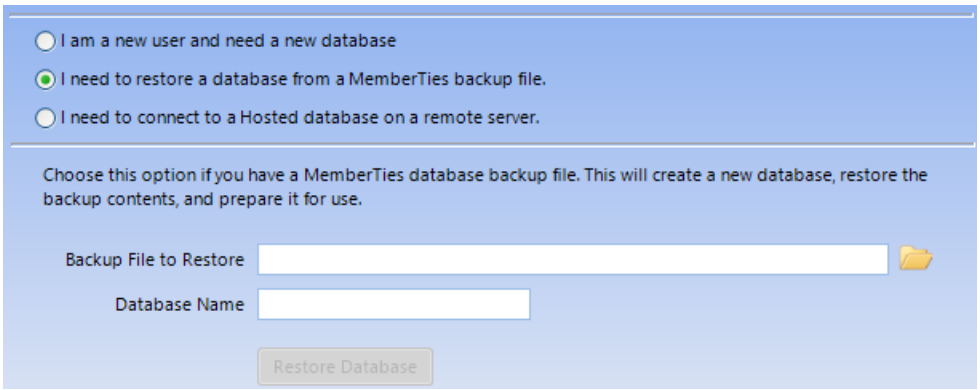
- Database Name - a short meaningful name for your database. For example, "Ski Club" or "My Database" are good names. "Branch of the Widgets Data 2022" is not a good name, because it will always be cut off in the list.
- User Name - the name with which you will log in. For example, "JSmith", "Susan", or "Secretary" are good names.
- Use Password - If you do not want to use a password, change this to No, and the password fields will be disabled. Otherwise, enter a case-sensitive password in both password fields.

  Important: Passwords are case-sensitive. "PASSWORD", "PaSswOrRd" and "password" are all completely different!

When all fields are ready, the Create Database button will enable. Click it to create the database and follow any other instructions.

Restore/Load a Backup File

Choose the option: *I need to restore a database from a MemberTies backup file*



Complete the following fields:

- Backup File to Restore - Use the browse icon to the right of the field to find and select your backup file. This should be a file named something like, "bkup_20220101_MyDatabase.sql". This is a proper single-file backup if your database, ready to restore

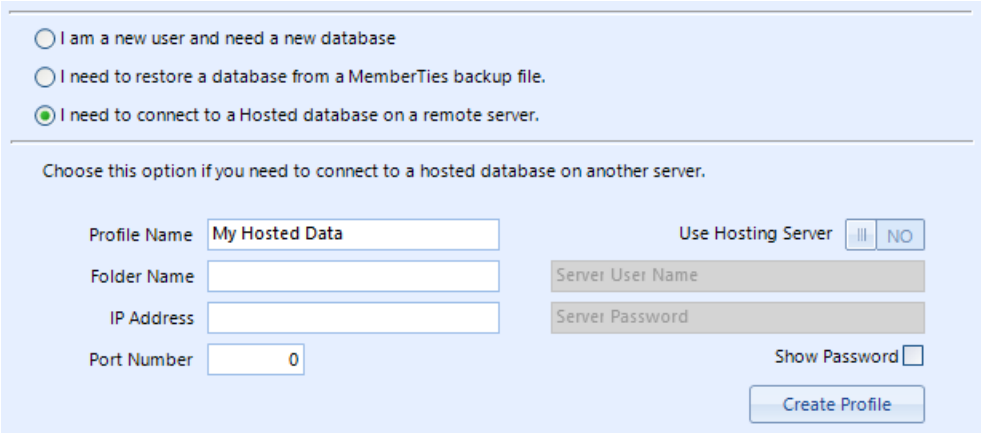
- Database Name - a short meaningful name for your database. For example, "Ski Club" or "My Database" are good names. "Branch of the Widgets Data 2022" is not a good name, because it will always be cut off in the list.

When you're ready, click Restore Database.

Note that if any errors occur when restoring the database, you may need to use the Database Toolkit to delete the "broken" database so you can attempt to restore again.

Use a Hosted (Remote) Database

Choose the option: *I need to connect to a Hosted database on a remote server*



Complete the following fields. Most of these settings should be provided to you, either from us if you are using our hosting service, or from your system administrator.

- Profile Name - A short meaningful name for your database. For example, "Ski Club" or "My Database" are good names. For a remote database, using the word "Remote" or "Hosted" in the name can help remind you that the database is somewhere else.

- Folder Name - The name of the folder specific to your database on the server

- IP Address - The address on which the remote server is listening for connections

- Port Number - The port through which database server communicates

- Use Hosting Server - Indicates whether you are connecting to a hosting server at Myrro International. Activating this will enable the server user name and password fields so you

can provide the connection information you received. If you are simply connecting to a database on another computer within your own organization, leave this off.

- Server User Name - The user name MemberTies should use to connect to the hosting server. This is not a MemberTies login user name and is normally provided to you specifically for a hosted database.
- Server Password - The password MemberTies should use to connect to the hosting server. This is not a MemberTies login password and is normally provided to you specifically for a hosted database.
- Show Password - Causes the password to display in plain text.

When you're ready, click Create Profile and follow any additional instructions.

7.1.2 Restoring a Backup

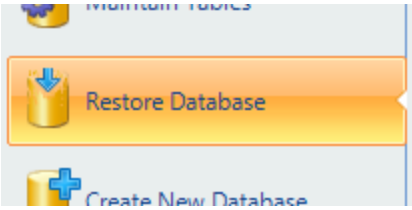
A database backup file can be used to restore the database to the state it was in when the backup was performed.

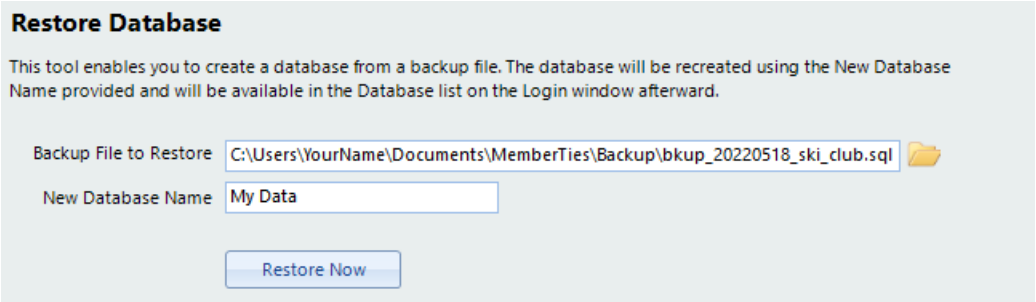
Note:

- You cannot restore the database if you are connected remotely. This is to protect the database from being easily overwritten by a remote user.
- You cannot restore a database "over top" of an existing database; the existing database must be deleted first. This is to prevent accidents.

Restoring a Database Backup

1. Open the Database Toolkit
2. Choose Restore Backup.





3. The following fields are available:

   - Backup File to Restore - Use the browse icon to the right of the field to find and select your backup file. This should be a file named something like, "bkup_20220101_MyDatabase.sql". This is a proper single-file backup if your database, ready to restore

     Note: If instead of a single file, you have a folder full of dozens of files with extensions like "myd" and "frm", you may actually have a copy of the live database. If possible, you should contact the person who provided that data and ask them to create a backup by using the software, because a copy of the live database could contain errors, un-closed tables, etc. In other words, it may not be in a good state to use going forward. If there is no way to get a proper backup file, please contact Support for help.

   - New Database Name - a short meaningful name for your database. For example, "Ski Club" or "My Database" are good names. "Branch of the Widgets Data 2022" is not a good name, because it will always be cut off in the list.

4. Click Restore Now to start the process.

5. When the restore finishes, the database should be available for use. Remember that only user names and passwords that existed in the restored database will be valid when you log in again.

7.1.3 Upgrade or Reinstall

This topic applies to you if you have reinstalled the software, or have installed an upgrade to the software (i.e., upgraded to a new release).

Note: If you are running any sort of firewall or anti-virus software on your computer, read this.

Reinstalling the Software

When reinstalling or upgrading the software, you should normally use the suggested installation location. The installation wizard will normally use the existing location.

Note: If the installation wizard chooses to install to the Program Files folder instead of Program Files (x86), that is fine, just be sure to use the same folder name within that. i.e., if

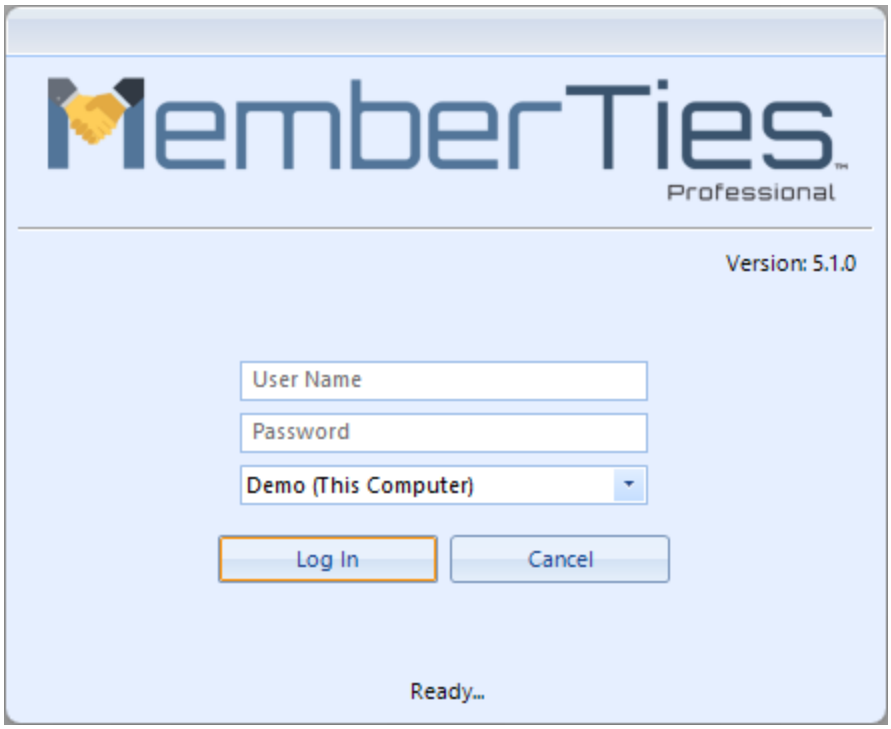
the old installation was in "Program Files (x86)*MemberTies*", the new location should be "Program Files*MemberTies*". This is because the server files are expected to be in a folder by the same name under ProgramData. So as long as sub-folder stays the same, everything will be found normally.

After installing MemberTies, you should be able to simply log in to your database using whatever user name and password you were using before. If your previous installation was older than the version you are installing, the system will probably upgrade the database to make it compatible with the current version.

7.1.4 Normal Login

If you have logged in to MemberTies before, you should have a valid user name and password for at least one database.

Note: If you need to restore a backup file instead, see Restoring a Backup for details.



Logging In

1. Enter your user name and password.
2. Select the appropriate Database.
3. Click Login.

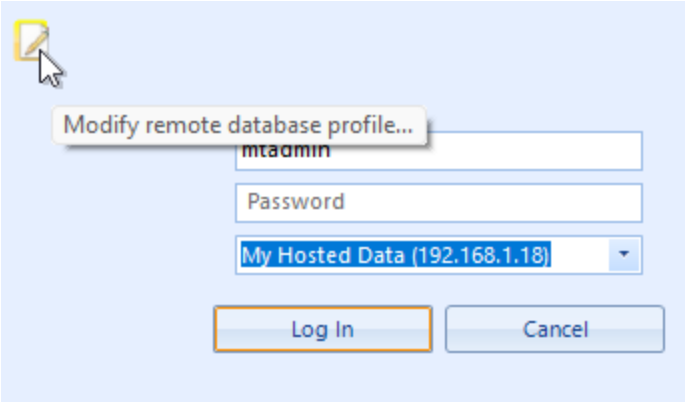
Notes:

- Note that you when using a remote connection, a special edit icon appears on the Login window that allows you to modify a profile quickly to correct a typo or other error. See Modify Remote Profile for details.
- If the maximum number of users allowed by your license are already logged in, the Active Connections window will be displayed.
- If you would like to skip the login window entirely (and you're sure nobody else will try to get into your database) you can have the system log you in automatically. See the Auto-Login Database Preference for more information.

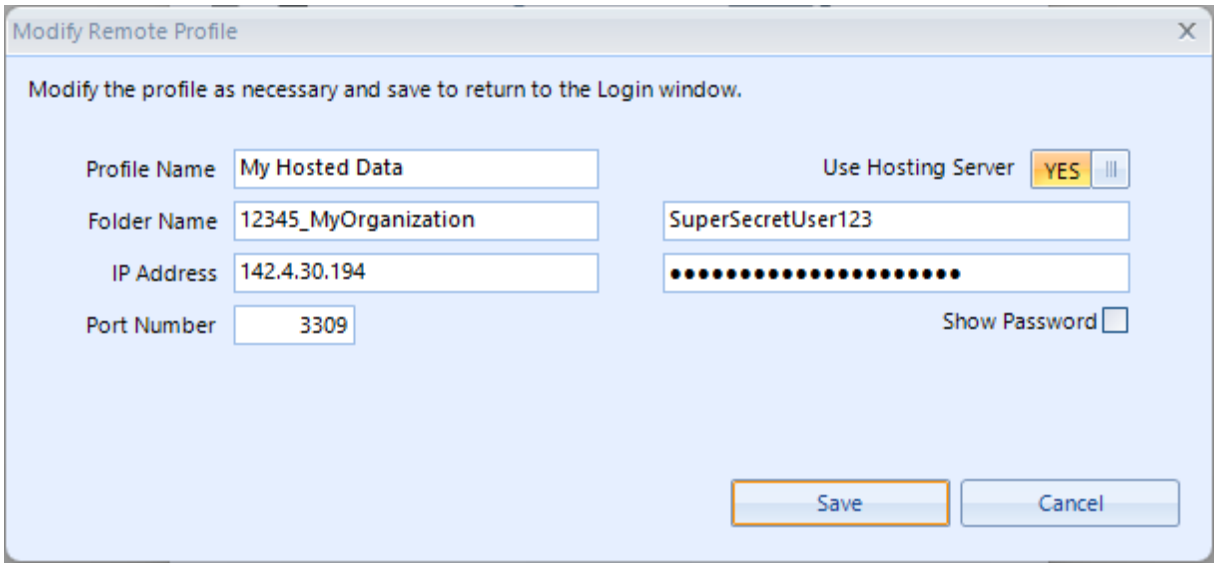
7.1.5 Modify Remote Profile

If you try to connect to a remote database and receive an error that indicates the profile is incorrect, you can modify it directly from the Login window.

When a remote profile is selected in the database list, a special edit icon appears on the window as shown below:



Click this to open the Modify Remote Profile window



Correct any errors (typically there is a typo in a user name or password) and click Save to return to the Login window with the new settings.

Note: To prevent a passerby from just clicking the icon and seeing your server password, choosing Show Password will clear any existing password value.

7.1.6 Languages

MemberTies is written and supported in English, so it is important that someone in your organization can speak English if you ever need to contact us for support.

The following language variations are installed:

- Default (US English) - standard US translation
- UK English - standard UK translation (mostly just changing certain words, like using "Cheque" instead of "Check" on financial windows, or "postal code" instead of "ZIP Code" on addresses

We at Myrro International do not claim to be fluent in any language other than US English (and sometimes even that is questionable -- we're programmers, after all), so if you notice something that would be more properly written another way, please let us know.

The language is set via the Language preference.

7.1.7 Login Problems

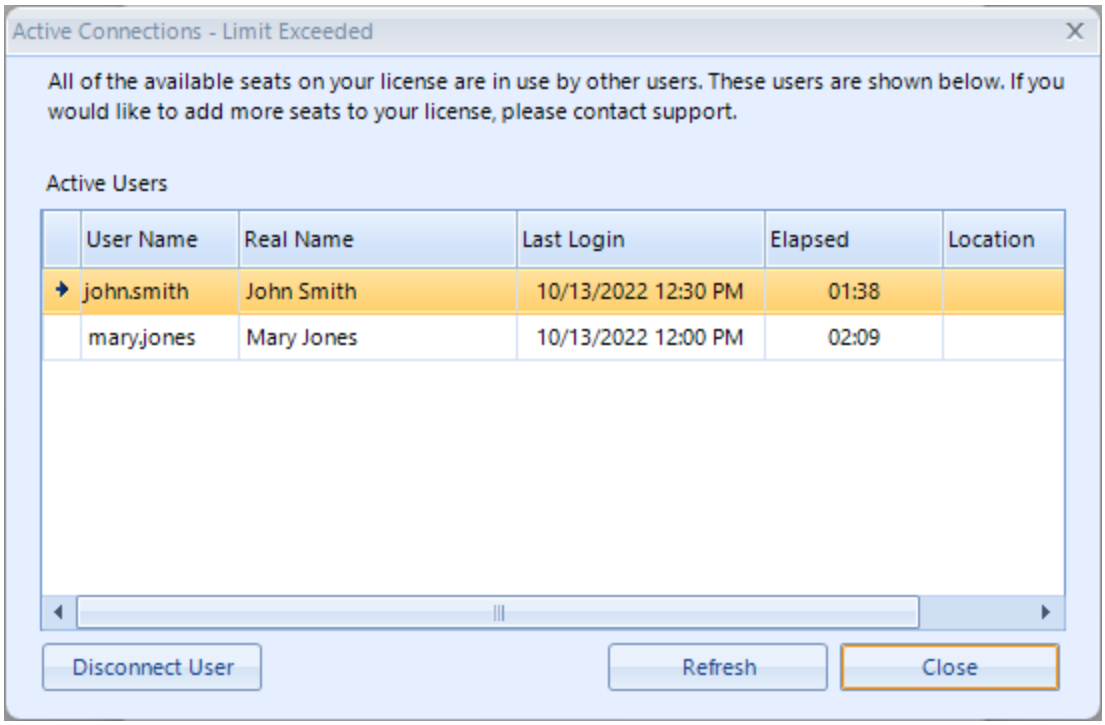
If you experience problems logging in to MemberTies, it is normally caused by one of the following:

- A firewall or anti-virus program may be preventing the server from starting. If you are running any sort of firewall or anti-virus software on your computer, read this.
- Too many connections: If the Active Connections window appears, it means the number of seats allowed by your license are already in use. You won't be able to log in until someone else logs off.
- Improper Case: You are not typing the password in the proper case, i.e., the Caps Lock key may be on. This is the most common problem.
- Illegal User: You are trying to use a user name/password combination that is not valid or does not exist on the selected database.
- Invalid Database: The database selected in the Database list does not exist, or is not a MemberTies database. It could be an attempted restore that failed, or it could have been removed while your Login window was open. In this case, you should contact your MemberTies administrator.
- Deleted User Name: Your user name has been deleted or deactivated. Contact your MemberTies administrator in this case.
- Access/Permission Problems: your Windows user name may not have privileges to write to the installation folder under c:\ProgramData. This is rare, since it should be set up by the install wizard to allow everyone to access it. Try starting MemberTies as an Windows administrator and see if that fixes it. If so, check the privileges on the install folder or contact support if you continue to have problems.

7.1.8 Too Many Users

Too Many Users at Login

If you try to log in and there are too many active users, the Active Connections (i.e., "too many users") window appears. This window indicates that there are no more available "seats" on your license to allow another user (you) to log in.



Note: Only the mtadmin user will see the Disconnect User button.

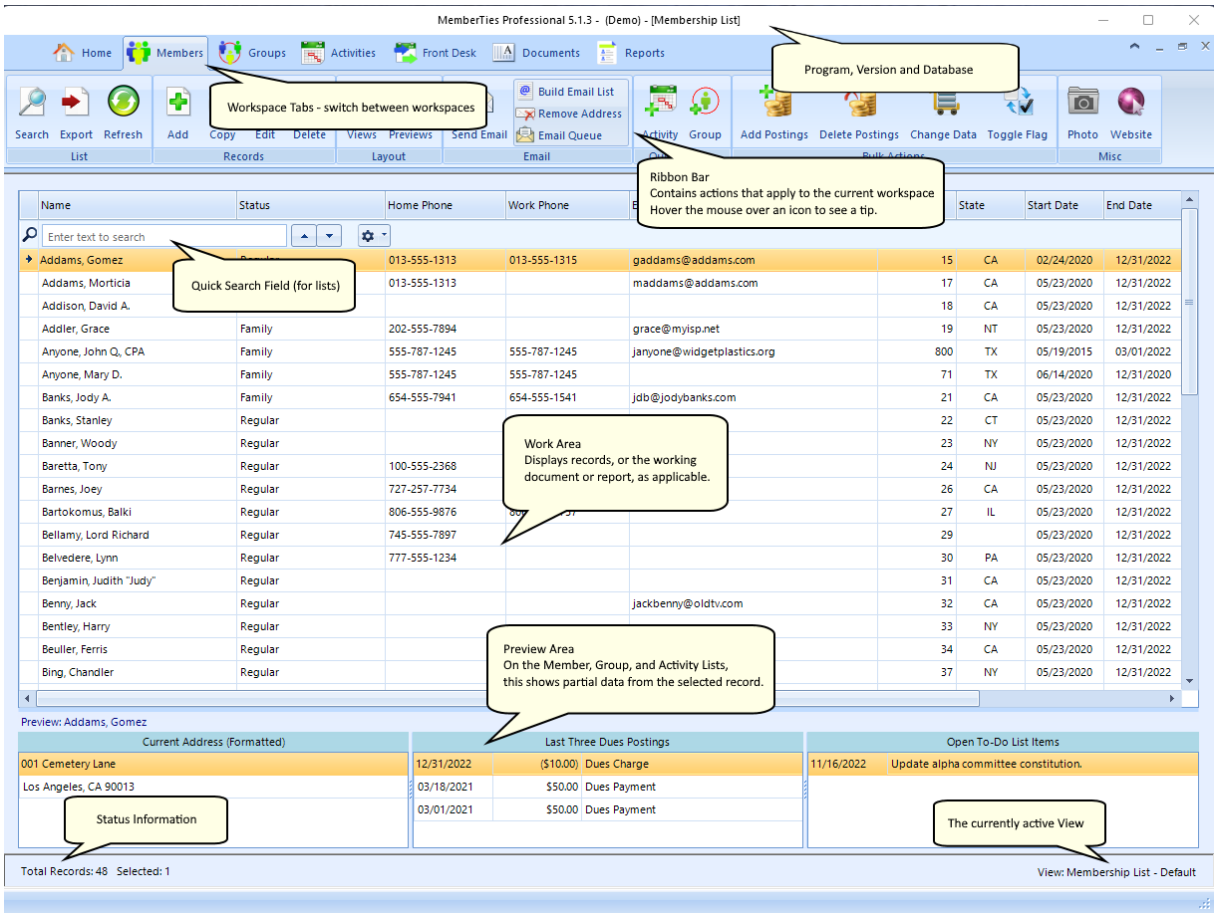
If you are not allowed to disconnect an entry, you can click Refresh while waiting for an opening, or close and try to log in later.

Note: The system will log you in immediately when closing the window if a seat is now available.

7.2 General Functionality

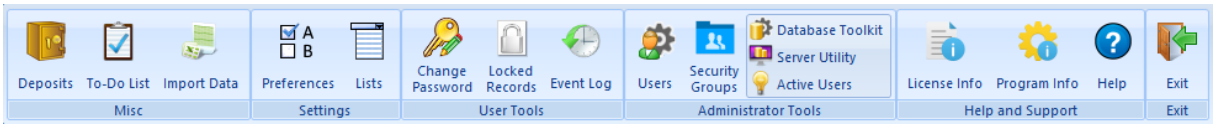
Program Window

The general layout of the main program window is shown below. This example is the professional version. Certain features, such as the Front Desk, Documents workspace, and the Preview area are not available in the standard version of the software.



Ribbon menus

MemberTies uses a set of ribbon bars to provide easy, visual access to all of the functionality in the program. Rather than lots of confusing menus with lists of commands under commands under more commands, the ribbon bars will get you to anything needed.



The Home ribbon bar

The above shows main ribbon, called "Home". This ribbon is used for actions that are more "system-wide" like Preferences, or can affect multiple areas, like Deposits or To Do Lists, as well as anything that doesn't fit into one of the 6 workspaces used by the program.

In addition to the Home ribbon, each workspace has its own ribbon, as listed below.

Each ribbon contains multiple sections, with a name indicating their general purpose. The Home ribbon sections include:

- Settings - program settings like Preferences and Lists

- Misc - things that didn't fit elsewhere
- User Tools - options to allow changing a password, viewing security rules or locked records, etc.
- Administrator Tools - only visible when logged in as the mtadmin user, contains links to the Database Toolkit and Server Utility, more powerful tools for maintaining users and security groups, and a button to view all currently active users
- Help and Support - program and license information, and a general link to this help system
- Exit - for those who like an actual exit button (you can just use the [X] to close the main program at any time as well)

To change to a different ribbon, simply click it's header (Members, Groups, etc.).

The other ribbons are each specific to a workspace. Click on any entry to see more details:

- Members
- Groups
- Activities
- Front Desk*
- Documents*
- Reports

Adding/Editing/Deleting Data

The Basic Actions

Nearly every list in the system will include one or more of these buttons. They won't always have the text shown below like this example from the ribbon bar, but the images will remain the same.

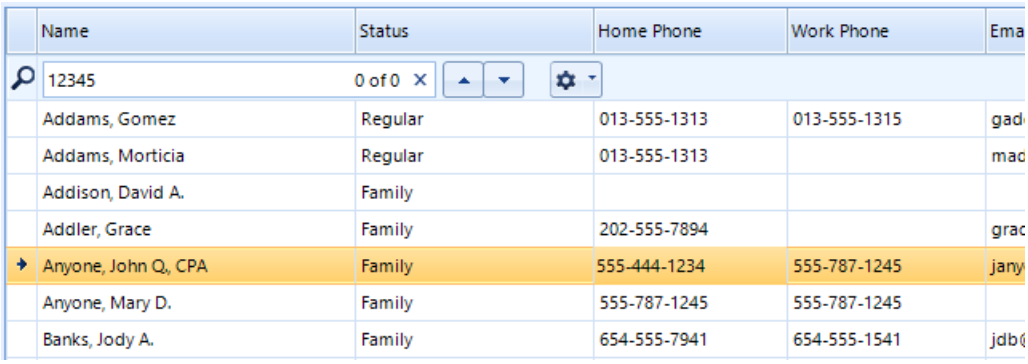
- Add - create a new record in the list
- Copy - duplicates the currently selected record in the list
- Edit - opens the currently selected record for editing

- Delete - deletes the currently selected record or records in the list

Some lists may include other buttons, such as a Merge button to combine entries, or arrow buttons to let you change the order.

The Quick Search

Each of the main lists (Member, Group, and Activity) include a quick search field at the top which can help you quickly find a record in the list.



Name	Status	Home Phone	Work Phone	Ema
12345	0 of 0			
Addams, Gomez	Regular	013-555-1313	013-555-1315	gad
Addams, Morticia	Regular	013-555-1313		mac
Addison, David A.	Family			
Addler, Grace	Family	202-555-7894		grac
Anyone, John Q., CPA	Family	555-444-1234	555-787-1245	jany
Anyone, Mary D.	Family	555-787-1245	555-787-1245	
Banks, Jody A.	Family	654-555-7941	654-555-1541	jdb@

Simply begin typing in the search field, and matching data will be highlighted wherever it is found in the list.

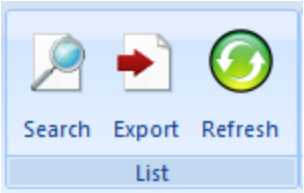
* Professional Version Only

7.3 Initial Setup

To get the most out of MemberTies, it is helpful to get some basic things set up before you begin entering records. The information below is designed to help you through this setup process.

Setting Up Defaults

There are several default values, lists, and settings that will help simplify the process of entering records later. All of these are easily accessible via the Settings section of the Home ribbon.



The following list covers the most import things to check:

- Membership Statuses - are an extremely important area for customization. The system comes preloaded with a selection of statuses that may or may not match the way your organization works. Statuses are essentially classes of membership. Preloaded statuses include things like, Regular, Couple, and Alumni., but you can create your own called "Family", "Newbie", or whatever.

  When you create statuses, you will also be able to set up dues information and other important characteristics including the default status to be used for new records. Statuses drive a lot of processing in MemberTies, so it is worth taking time to decide how you want to set them up.

- Genders - Male and Female are preloaded, with a default of Unknown. You can set up any number of other entries as needed for your organization.

- Default State and Country - (Addresses > States, Countries) each time you create a new membership record, the state and country are set automatically (though you can change them). The default state is (None), and the default country is United States. You should change these values to match the majority of your membership.

- Address Types - (Addresses > Address Types) are used with the professional version, which allows for more than one address per member record. Address types might be "Main Address", "Summer Home", "School", etc. The one set as the Default will be used automatically on new records.

- Address Formats - (Addresses > Address Formats) enable you to specify the way an address will look based on the country.

- Phone Types - identify the type of phone number being stored. For example, in major cities, some people have a "Metro" number that people can use to avoid long distance charges. Other examples would be "Mobile", "Pager", "Fax", or anything else that describes a phone number. Since membership records let you specify a Home, Work, and Other phone number, you can specify what phone type will be the default for each kind of phone number. The default is "Normal" for all of them.

- References - the membership record has a field called "Reference," in which you can record the method by which a person found out about your organization. The options you can choose are called "References". The default is "Unknown".

- Categories and Items - are used together as a way to assign awards, titles, achievements, or other miscellaneous "stuff" to membership and group records. A typical category might be "Officer", and a typical item under that category might be "Treasurer".

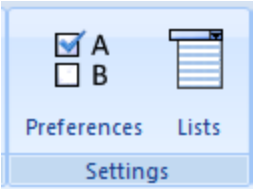
- Custom Fields - are fields that you can name and use for anything you like. You can create any number of custom fields, and they can be defined as numbers, text, dates, or currency. They can display as a normal field, a checkbox, or a selection list. You can control what goes in them, and how it displays. Custom fields are used for anything you need to track that doesn't already have a field of its own.

- Locations - (Activities > Activity Locations) are used with any activities you create. Each activity has to take place somewhere, and MemberTies refers to these places as "Activity Locations." By default, a location called "To Be Determined" is already available, but you can add more at any time.

- Attendance Statuses - are used for every activity attendee to indicate whether they were present, absent, declined, etc. Each attendance status has a setting to indicate whether an attendee with that status should be reported as having actually attended the activity. You'll want to make sure statuses like "declined" are not marked for reporting, or an activity attendance report will show attendees who weren't really there.

Preferences

There are two kinds of preferences: System and User. System preferences apply to all users, whereas User preference settings only apply to yourself. Preferences are easily accessible via the Settings section of the Home ribbon.



You may want to look through all of the preferences, just to get an idea of what you can change, but there are several preferences you may want to change right away:

- Organization section

  - Name of Organization - the name that will display at the top of reports. **Note**: If you have purchased a license for MemberTies and it has been applied to the dat6abase, the name is obtained from the license and cannot be changed. See Registering for more information if you need a license.

  - Return Address - this is used on address labels and on reports like the Account Statement.

  - Year Begin Month - this is used when prorating dues with the Dues Calculator, and for Fiscal Year date ranges.

- Login Section - has various settings to control what happens when the program starts, such as checking for program updates, showing the Tip of the Day, and more.

- Logoff Section - similar to the login section, these are things that happen when the program exist, such as deleting any records in a "(Delete)" status.

- Report Section - these settings control several things about reports and the report window, but one commonly changed setting is the Tag Line, which appears at the bottom of all reports. (The tag line might be something like, "Please contact the Membership officer with changes to this information.")

The Administrator Password

Sooner or later you will want the administrator password. When you log in as the administrative (mtadmin) user you will have some special options available on the Home ribbon to do things like create new users and setup security. The administrator account is always named "mtadmin" and the default password is "password." It is strongly recommended that you log in as the administrator at some point and change the password to something more secure.

Security Groups

By default, every MemberTies user can do everything. If you will have multiple users, you may want to control what they can and cannot do. When logged in as the administrator user, you can set up security groups and assign users to them, to control what actions they can perform. Note that security rules control what a person can *do*, not what records they can do it *to.* i.e., it isn't possible to create a rule like, "Allow editing John Smith's Dues Data". The rule could only be to edit dues data in general, not data for a specific record.

Additional Users

If multiple people will be using MemberTies, they should each have their own user name and password so you can tell who changed which records. See Working with Users for complete details.

Add Membership Records

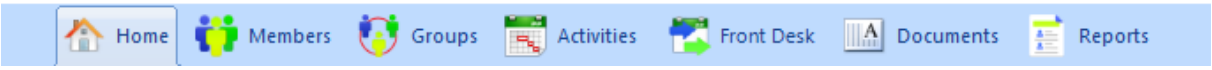
Now you have set up defaults, built lists, and organized your statuses. You are ready to add membership records! As you do so, remember that you can press F1 on any window to display the Help for that window.

Thank you for using MemberTies!

7.4 Ribbon Bar Tabs

The tabs above the ribbon bar enable you switch ribbons. Each ribbon other than Home represents a specific workspace.

The available tabs may vary based on standard vs professional version, and security settings.



The general use of each button is described below. Click any option to go to the help for that area.

- Home - returns to the default home workspace
- Members - opens the Members workspace

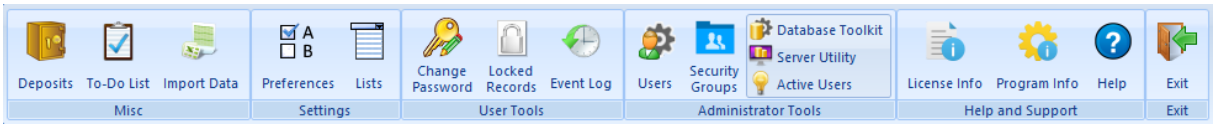
- Groups - opens the Groups workspace
- Activities - opens the Activities workspace
- Front Desk* - open the Front Desk window to check people in/out of activities
- Documents* - opens the Documents workspace
- Reports - opens the Reports workspace

* Professional Version Only

7.5 Home Ribbon Bar

The ribbon enables you to access all general MemberTies functionality that isn't specific to another workspace.

The available icons may vary based on standard vs professional version, and security settings.



The general use of each button is described below. Click any option to go to the help for that area.

- Deposits* - enables managing deposits
- To-Do List - displays the To Do list covering all Member, Group, and personal to-do items
- Import Data - enables importing data from an external file
- Preferences - enables management of all system preferences controlling system functionality
- Lists - enables management of all system dropdown lists, default values, etc.
- Change Password - enables changing your current password
- Locked Records - displays all locked (in-use) records. The mtadmin can remove locks here.
- Event Log - displays all logged system events (If the event log is enabled)
- Maintain Users - manages users for the system

- Security Groups - manages security groups and rules
- Database Toolkit - closes MemberTies and opens the Database Toolkit utility
- Server Utility - closes MemberTies and opens the Database Server utility
- Active Users - displays a list of all users currently logged in from any computer
- License Info - displays the status of the current license
- Program Info - displays the current program and database version, and support contact info
- Help - opens this help file
- Exit - closes the program

* Professional Version Only

7.6 Keyboard Shortcuts

The following keyboard shortcuts are available:

General

Open Help	F1

Main Workspace Lists (Member/Group/Activity)

Copy the selected row	CTRL + C
Select all rows	CTRL+A
Add a new record	CTRL + N
Open a record for editing	CTRL + O
Delete a record	CTRL + DEL
Duplicate a record	CTRL + D
Refresh the list	F5

Also note that normal windows list selection shortcuts work. i.e., click one row, then shift+click another row to select all rows in-between. CTRL + Click to select non-contiguous rows, etc.

Date Fields

Set the date to Today	T
Add/Subtract one Day	+ or -
Add/Subtract one Month	M or CTRL + M
Add/Subtract one Year	Y or CTRL + Y

Time Fields

Clear the time	CTRL + DEL
Set the time to midnight	DEL
Add/Subtract one Month	M or CTRL + M
Add/Subtract one Year	Y or CTRL + Y

Drop down Lists

Add a new choice	CTRL + N	Applies to any list that includes a <New> option. i.e., City

7.7 Selecting Rows in Lists

Many lists allow you to select more than one row, so you can perform some action on them all. For example, you may be able to delete all selected records, or load them all into the Email window, or save them to a file.

MemberTies supports the standard Windows row selection actions using a combination of the keyboard and the mouse, as described below.

To Select...	Use...	In Detail...

One or more rows	CTRL + Click	Hold down the CTRL key and click each row you want. Each row you click while holding down the CTRL key will be added to the set of selected (highlighted) rows.
All rows between one and another	SHIFT + Click	Click the first row, then hold down the SHIFT key and click the last row. Every row between the first and last will be selected.
All rows in a list (select all)	CTRL+A	Hold down the CTRL key and press the "A" key.

Note that the CTRL and SHIFT keys can be combined to select different sets of rows. i.e., you can hold the CTRL key to select several rows, then add the SHIFT key to it and click further down the list.

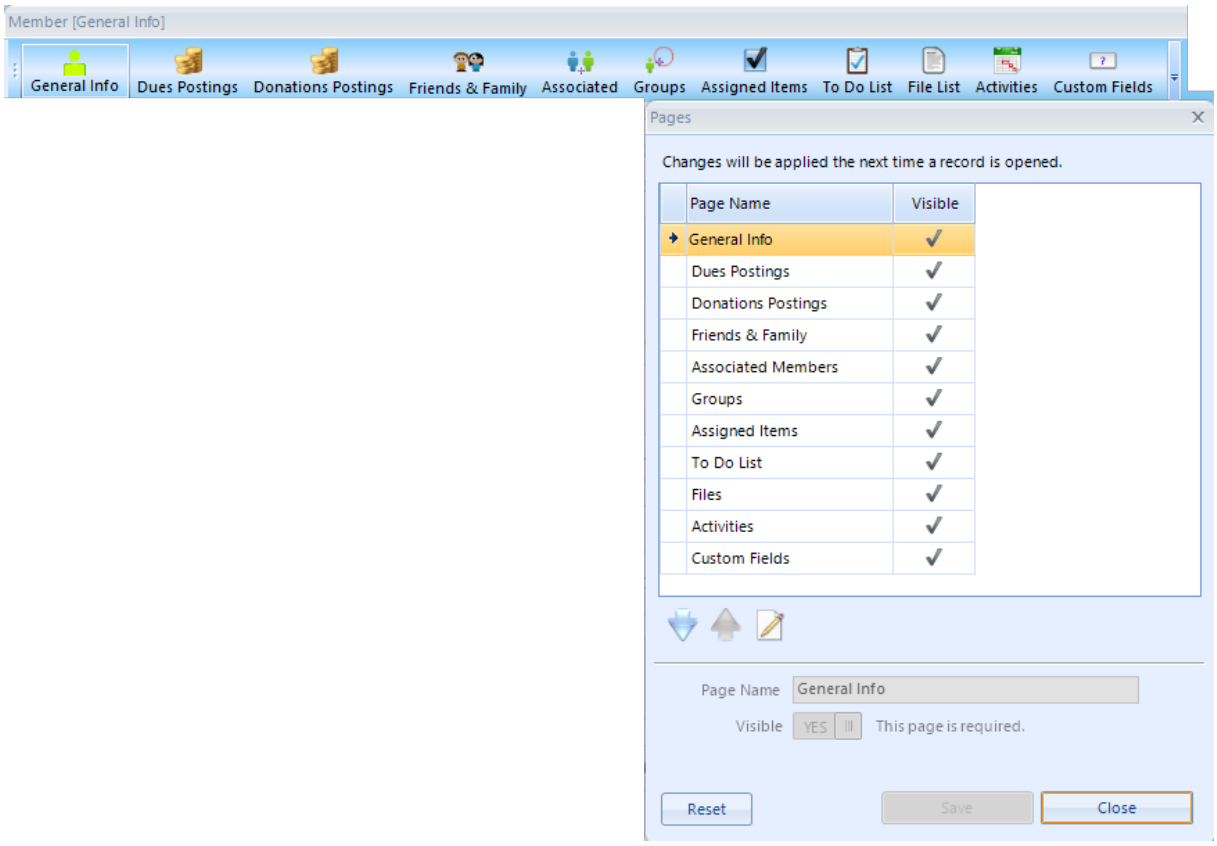
To Unselect Single Rows

If you have a bunch of rows selected and just want to unselect a row within the set, hold the CTRL key down and click the row you don't want. If it is already selected (highlighted), it will be unselected.

7.8 Changing Page Order

If there are pages of the Member, Group, or Activity record you never use, or pages that you use more than others, you can control which pages appear on the window when you open a record by clicking the narrow down-arrow on the far right of the command bar when a record is open.

The following example shows this option on a Member record.



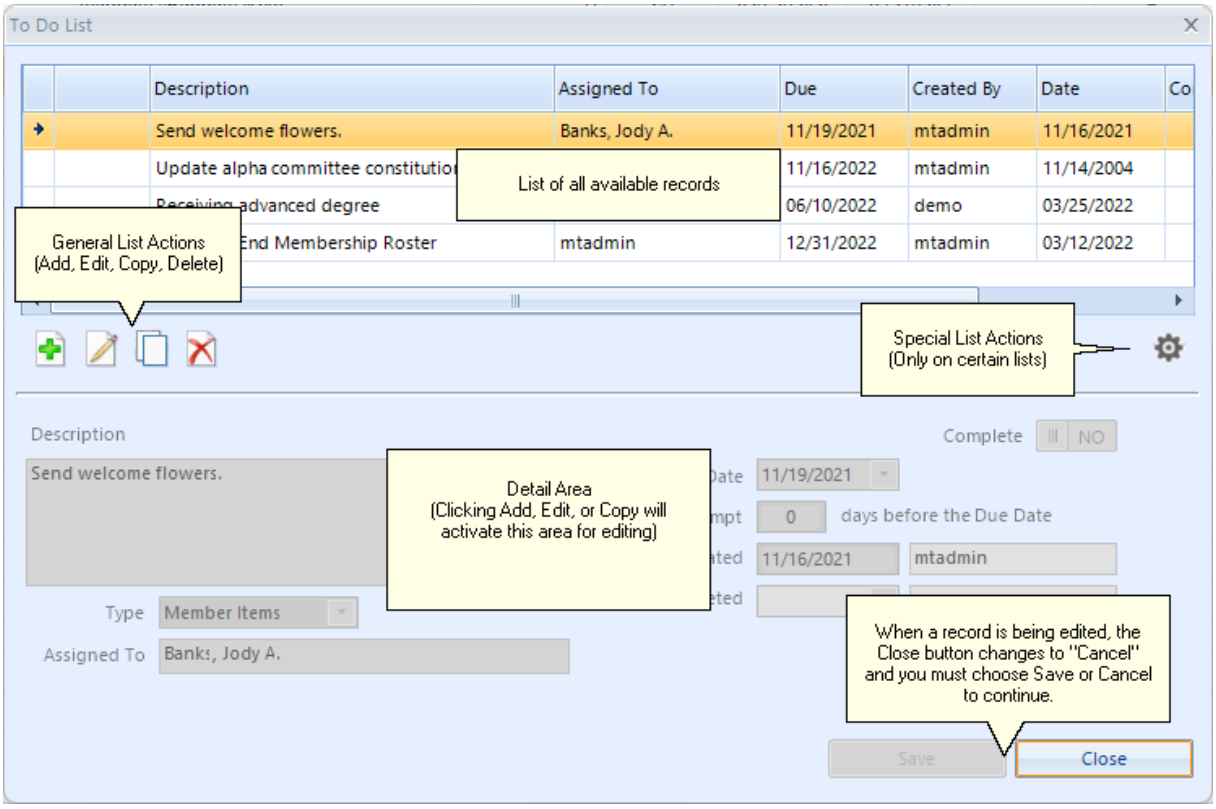
This window enables you to change the name of a page, move it up/down in the page order, or hide it entirely. Click Reset to restore the original settings.

7.9 Editing Records

MemberTies frequently uses a special layout of data called, "Master/Detail" whenever you are working with multiple records in a list.

This enables you to see all the records in the list at once, and also see the details by simply selecting a record.

Take the To Do List window as an example:



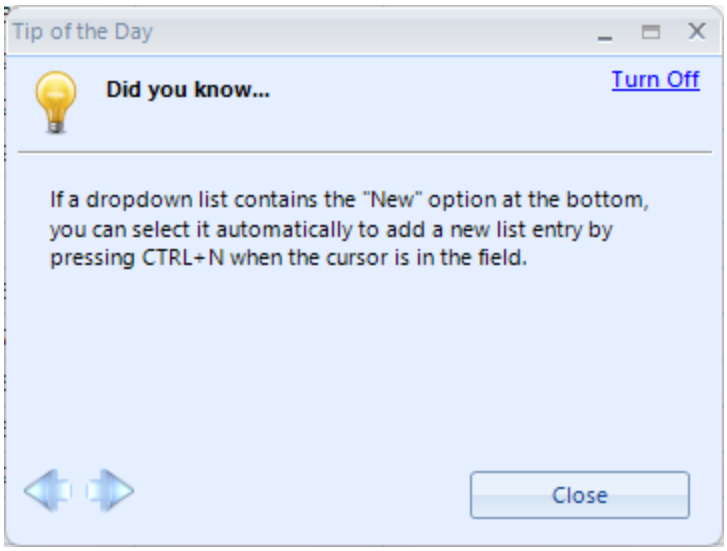
When data is presented in a list like this, you can click any record in the list to review its details, and if you need to make changes, simply double-click the row or click the Edit icon to alow editing. When you're finished, click Save to "disable" the Detail Area again, so you can use the list.

This enables you to quickly open a record, edit it, save it, and move on to the next record, without ever closing the main window.

7.10 Tip of the Day

The Tip of the Day window will appear after you log in unless you turn off the Tip of the Day preference or click, "Turn Off" on the Tip of the Day window (which updates the preference setting).

The tips are designed to point out helpful or lesser-known features of the software and other ways to do things.



To Reactivate the Tip of the Day

If you have disabled the Tip of the Day and want to display it again:

1. On the Home ribbon, click Preferences.
2. In the Login section, click Tip of the Day.
3. Change the setting to Yes.
4. Click Save.

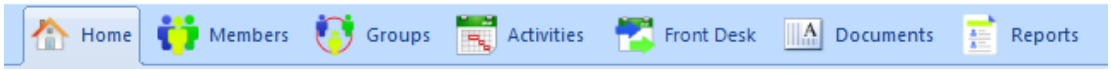
The next time you start MemberTies, the Tip of the Day will be displayed.

7.11 Viewing Program Info

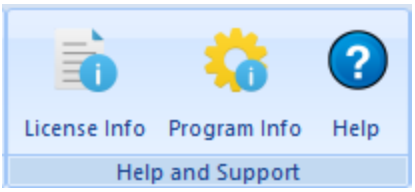
Information about the currently applied license can be displayed from the Home ribbon.

Viewing Program Info

1. Choose the Home workspace by clicking the Home tab above the ribbon.



2. In the Help and Support section of the ribbon, click Program Info.



3. The Program Information window will open.

4. The following fields are available:

- Program Version - the current program version
- Database Version - the current database version
- Release Date - the date the program was released
- Support Contact Email - the email to use for any program questions or support needs
- Support Contact Website - the support website. Click the globe icon to the right of the field to open the website in your default browser

Note: Click *Check for Updates* to query the server to see if a newer program version is available

Part VII

Activity Records

8 Activity Records

8.1 Activity List Overview

The Activity List lets you access all of the activity records in the database. A dedicated ribbon of commands enables you to access activity-related functionality.

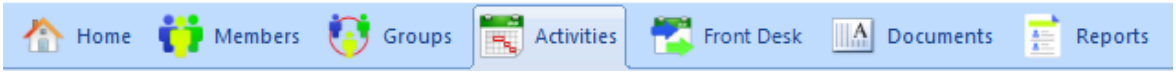
An *activity* is anything your organization "does." Typical activities include Meetings, Parties, Fund Raisers, Walks, Tournaments, etc. Activities can have specific Start and End Dates and times, or they can just "exist" without any associated date.

Using MemberTies Professional, you can also make members attendees of the activities, and track associated income and expense postings. Each attendee can have a role (i.e., "Chairperson", "Speaker", etc.), and an attendance status (i.e., "Confirmed", "Declined", etc.).

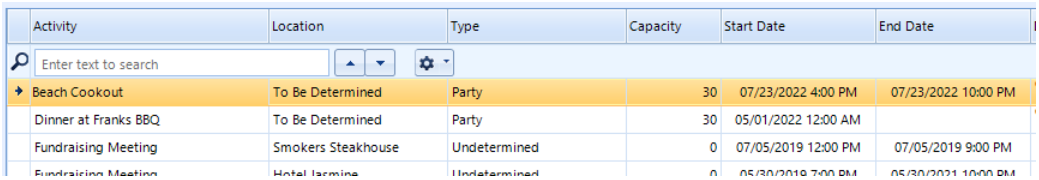
You can add multiple members to an activity directly from the Membership List. See Adding Members to an Activity for details.

Opening the Activity List

1. To open to the Activity List, choose the Activities tab from the ribbon bar.



2. The Activity List will display.

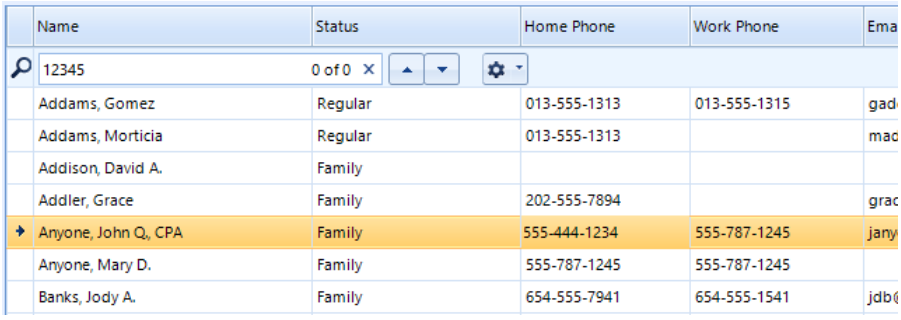


If you're not familiar with selecting records in lists, please see this topic on how to select records from lists in Windows.

Finding a Record in the List

When the list is displayed, you can quickly find a record by typing in the search field at the top of the list. Any text typed in the field will be sought throughout all data displayed in the list. Press CTRL+F or click in the search field to activate it. Any text typed in the field will be sought throughout all data displayed in the list.

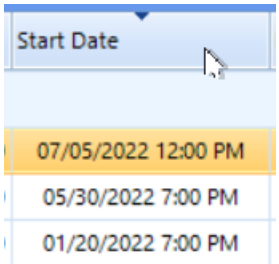
Note: A activity preference controls whether the field is activated automatically when the list is refreshed.



Name	Status	Home Phone	Work Phone	Ema
12345	0 of 0			
Addams, Gomez	Regular	013-555-1313	013-555-1315	gad
Addams, Morticia	Regular	013-555-1313		mac
Addison, David A.	Family			
Addler, Grace	Family	202-555-7894		grac
Anyone, John Q., CPA	Family	555-444-1234	555-787-1245	jany
Anyone, Mary D.	Family	555-787-1245	555-787-1245	
Banks, Jody A.	Family	654-555-7941	654-555-1541	jdb(

Changing the Sort

Click the column heading of any column to sort the list by that column. The following example shows a date column being sorted in descending order, so the most recent dates are at the top.



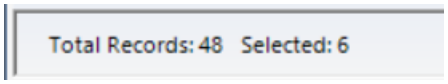
The first click will sort the column in ascending order, the second click will sort the column in descending order,and a small arrow icon will indicate the current sort direction.

Widening a Column

If you need to read especially long entries, just position your mouse pointer between the column headings until the cursor changes to a double-headed arrow, then drag the column to the size you want.

Refreshing the Data

When you add a record or change data on the list, the system will try to refresh the modified row so that you see the change immediately. If the change doesn't appear for some reason, you can press F5 or click the Refresh button on the ribbon to re-retrieve data from the database. Note that the number of records shown on the list, and the current number of selected rows is always displayed in the status area below the list.

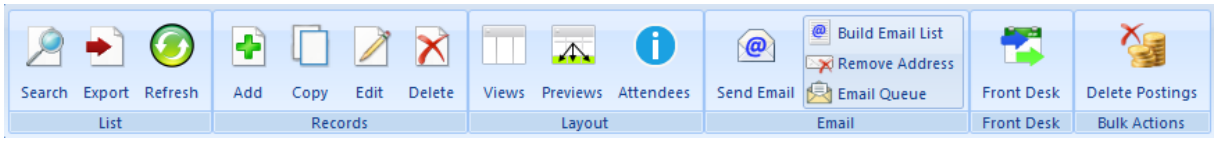


Working with Records

The ribbon bar provides access to everything related to the list records

8.2 Activity Ribbon Bar

The ribbon enables you to access all functionality that isn't specific to a single record (for which you would need to open a record from the list). The available icons may vary based on standard vs professional version, and security settings.



The Activity Ribbon

The general use of each button is described below. Click any option to go to the help for that area.

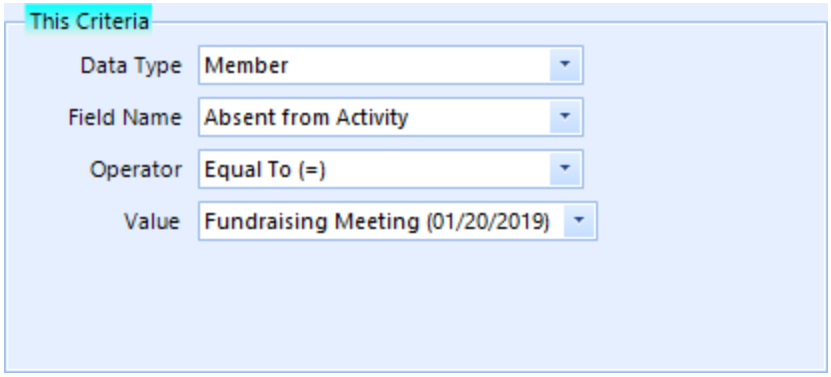
- Search - open the search window to change find specific records for the list
- Export - save the list data to a PDF file or other format
- Refresh - re-retrieve the list data from the database
- Add - or press CTRL+N to create a new record
- Edit - or press CTRL+Enter to open the selected record for editing
- Copy - or press CTRL+D to duplicate the selected record
- Delete - or press CTRL+DEL to delete the selected records
- Views* - choose or create a different layout of columns for the list
- Previews* - choose one or more blocks of data to display below the list
- Attendees* - display the current list of checked-in/checked-out members
- Send Email* - send email to the selected records
- Build Email List - export a list of email addresses from the selected records
- Remove Email Address - automatically find and remove an email address from any record containing it (this is not restricted to the Group list)
- Email Queue* - display the list of emails currently queued to be sent (this is not restricted to the Group list)
- Front Desk* - open the Front Desk window to check people in/out of activities
- Delete Postings* - delete postings from records based on criteria

* Professional Version Only

8.3 Reporting on Absent Members

Obtaining a list of members who did **not** attend an activity is a little tricky. If you run an activity report that includes attendance, it can only show members who **did** attend, not members who did not.

The solution is to run a membership report (like the Contact list, Roster, Directory, or any user-defined report based on membership data) or a search on the Membership List, and use a special criteria Field Name called "Absent from Activity".



This criteria set will find any members over age 50 who did not attend (were absent from) the activity.

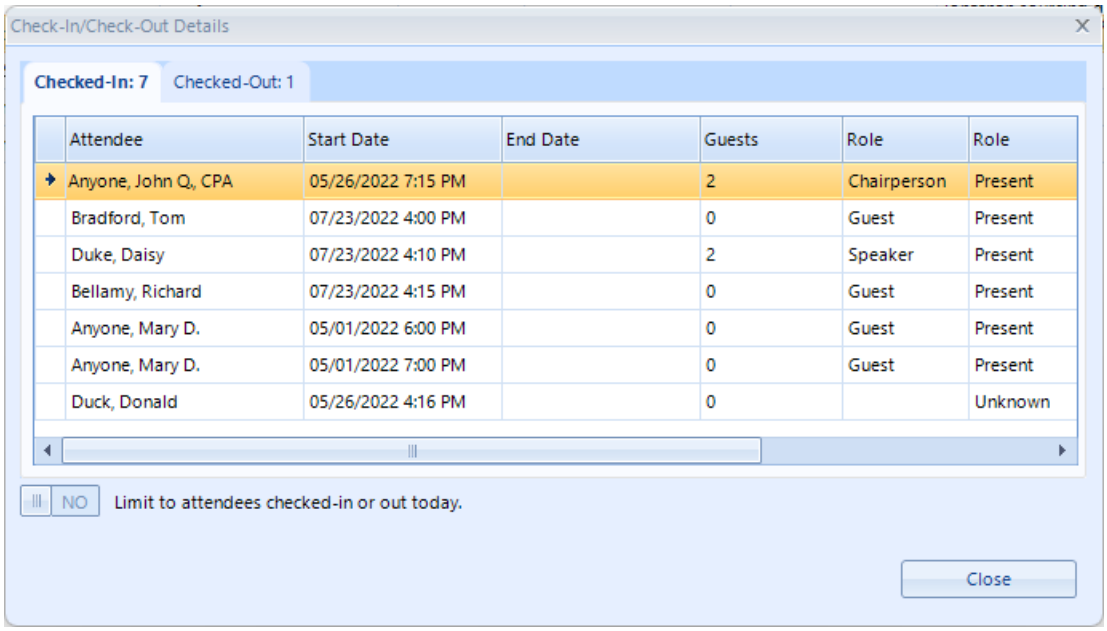
	(((	Field	Operator	Value	)))	And/Or
➔		Absent from Activity	=	Fundraising Meeting		And
		Age	>	50		

8.4 Viewing Current Attendance

You can quickly review the list of attendees for an activity directly from the Activity List.

Viewing Current Attendance

1. On the Activity ribbon (with a record selected), choose Attendees.



2. The list is divided into two tabs:

   - Checked-In - lists all attendees that do not have an End Date value (i.e., not checked out)
   - Checked-Out - lists all attendees that have an End Date value

   To limit both lists to only people who checked in or out today, turn on the Limit to Attendees... switch below the list.

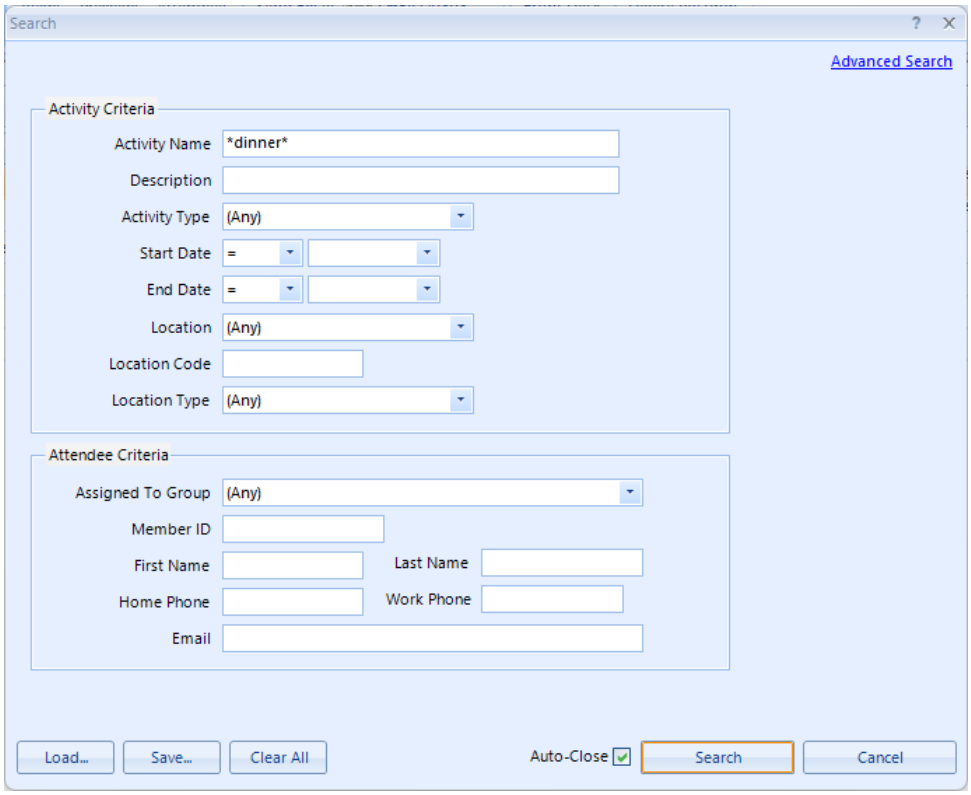
3. When you are finished, click Close.

8.5 Searching for Records

The search function enables you to search for a subset of activity records to display on the list. If you only have a few dozen records, this may never even be necessary.

Searching for Records

1. On the Activity ribbon, choose Search.



See the Search Overview for more details about using the Search window.

2. Enter your search criteria or choose Load to reload a previously saved search.

   Note: The search window always opens with the Basic search layout. You should think of a basic search as a "this and this and this" style of query. In other words, i the example above we selected "*dinner*" for the activity name (meaning the name has to include the word "dinner" somewhere) and chose Location Type = "Hotel/Motel". So the search essentially find all dinners held at hotels, but not dinners held anywhere else. So if an activity is called "Monthly Dinner" but the location type is "Beach", it will not be found.

   If you would rather create a more complex advanced search, click Advanced Search in the upper right to change the layout.

   See the search overview for complete details about using basic and advanced searches.

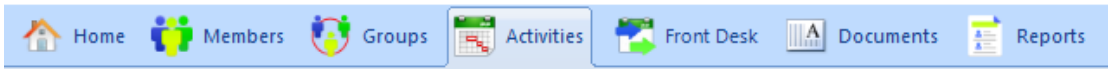
3. When you have entered or loaded your search criteria, click Search. The results will appear on the list behind the window, and if it looks good, you can close the window. (If the Auto-Close box was ticked before you clicked Search, the window will close automatically.)

8.6 Copying an Activity

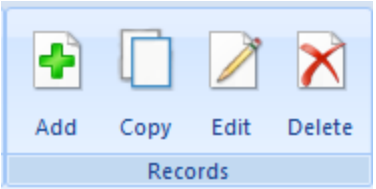
When copying a member from the Activity List, a few options are available to control how much of the record is actually duplicated.

To Copy an Activity

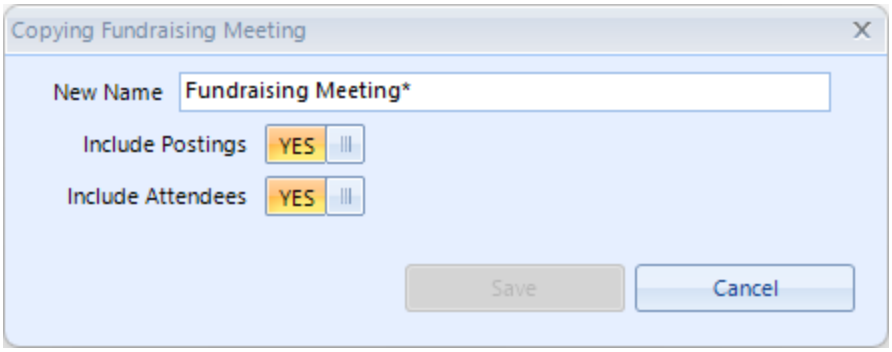
1. Choose the Activities tab from the ribbon bar.



2. In the Records section of the ribbon choose Copy.



3. The Copy window will open so you can set the new name and options:



4. The following fields are available:

   - New Name - the name for the activity. This defaults to the current name with an asterisk appended
   - Include Postings - controls whether all income/expense postings for the activity are copied
   - Include Attendees - controls whether all attendee records (and their postings if the Include Postings option is on) are copied

5. When ready to copy, click Save.

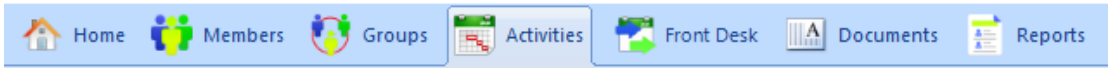
8.7 Working with Activities

8.7.1 Activity Overview

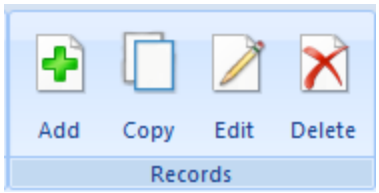
New activity records can be added to the database whenever the Activity List is active.

Working with Activities

1. Choose the Activities tab from the ribbon bar.



2. In the Records section of the ribbon choose Add to create a new activity, or select an existing activity in the list, and choose Copy, Edit or Delete.



3. The Activity window will open with the General Info page selected. If this is a new record, you must complete the General Info page before you can switch to other pages. See below for descriptions of each page:

   - General Info - provides the basic what/when/where detail of the activity, and provides a quick summary of the current state
   - Attendance - tracks who is attending the activity and their status
   - Income & Expense - tracks finances related to the activity
   - File List - lists any associated files or documents
   - Advanced - controls attendance limits, automatic reports, and postings

4. Complete all appropriate information, then click Save.
5. When finished, click Close.

Notes

- Your changes to the activity may not appear in the Activity List until it is Refreshed.
- If you're using MemberTies Professional, deleting an activity will also remove all associated Income and Expenses, as well as all associations between members and that activity. However, deleting the activity has no affect on the membership records themselves.

- An Auto-Save preference controls whether the system prompts you to save or cancel changes when changing pages.

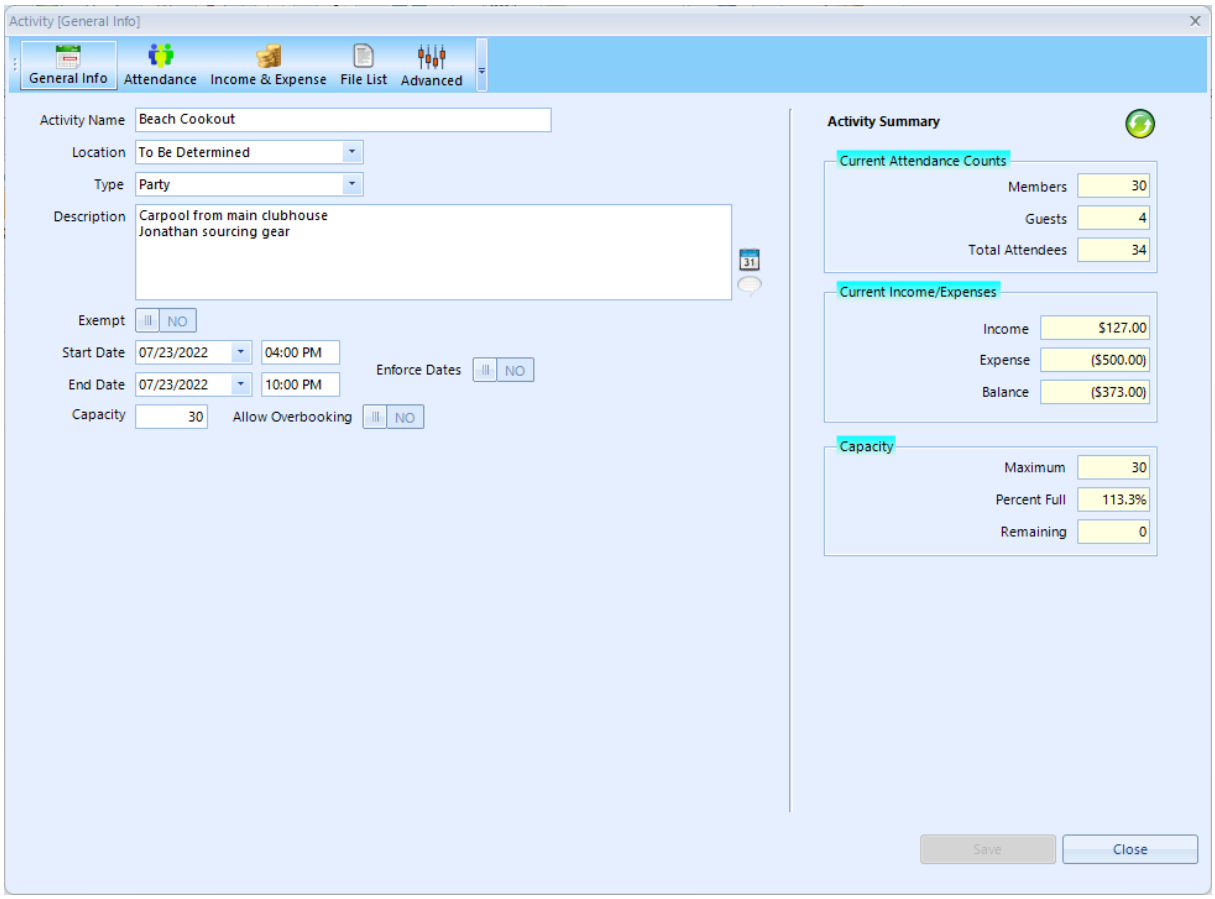
Changing the Page Order

If there are pages you never use, or pages that you use more than others, you can control which pages appear on the window. See Changing Page Order for more details.

* Professional Version Only

8.7.2 General Info Page

This page defines the basic "what, where, and when" of an activity, and provides a quick way to view the current state of the activity as far as attendance, expenses, and capacity.



The following fields are available:

- Activity Name - the name for the activity

- Location - lists all locations defined in your database. Values can be preloaded, but new entries can also be entered and you will be prompted to add the new entry to the list. See Maintaining Locations for more information. **Note**: When adding a new Location here, the system will use the default Location Type. If no default Location Type is available the system will be unable to create the new location because the type is required.

- Type - lists all Activity Types defined in your database. Activity types can be used as another way of categorizing your activities for quick reference. Values can be preloaded, but new entries can also be entered and you will be prompted to add the new entry to the list. See Maintaining Activity Types for more information.

- Description - general information about the activity

- Exempt* - indicates whether attendance of this activity counts toward the maximum allow attendance for a given status. For example, if Prospect status members are allowed to attend up to 5 activities before they have to join your organization, but you want anyone to be able to attend this activity regardless of that, you can turn off this setting and it won't count toward the total.

- Start Date/Time - the date and time the activity officially starts. They are both optional, though if you enter a time, you must also enter a corresponding date.

- End Date/Time - the date and time the activity officially ends. They are both optional, though if you enter a time you must also enter a corresponding date.

- Enforce Dates - indicates whether the system should require that the start/end dates of attendance records be within the start/end date range of the activity itself.

- Capacity* - indicates the maximum number of attendees allowed for the activity. A value of zero (0) indicates that there is no limit. If set to a non-zero value, then once the capacity is reached, no more attendees or guests can be added unless the Overbook option is turned on (see below).

- Overbook* - indicates whether the specified Capacity can be exceeded. For example, you may have a capacity of 50 attendees, but if you exceed it you know you can make additional space available, etc., to accommodate the greater headcount.

The right side of the window displays the Activity Summary*, and provides a quick reference for current counts, income/expenses, and capacity.

* Professional Version Only

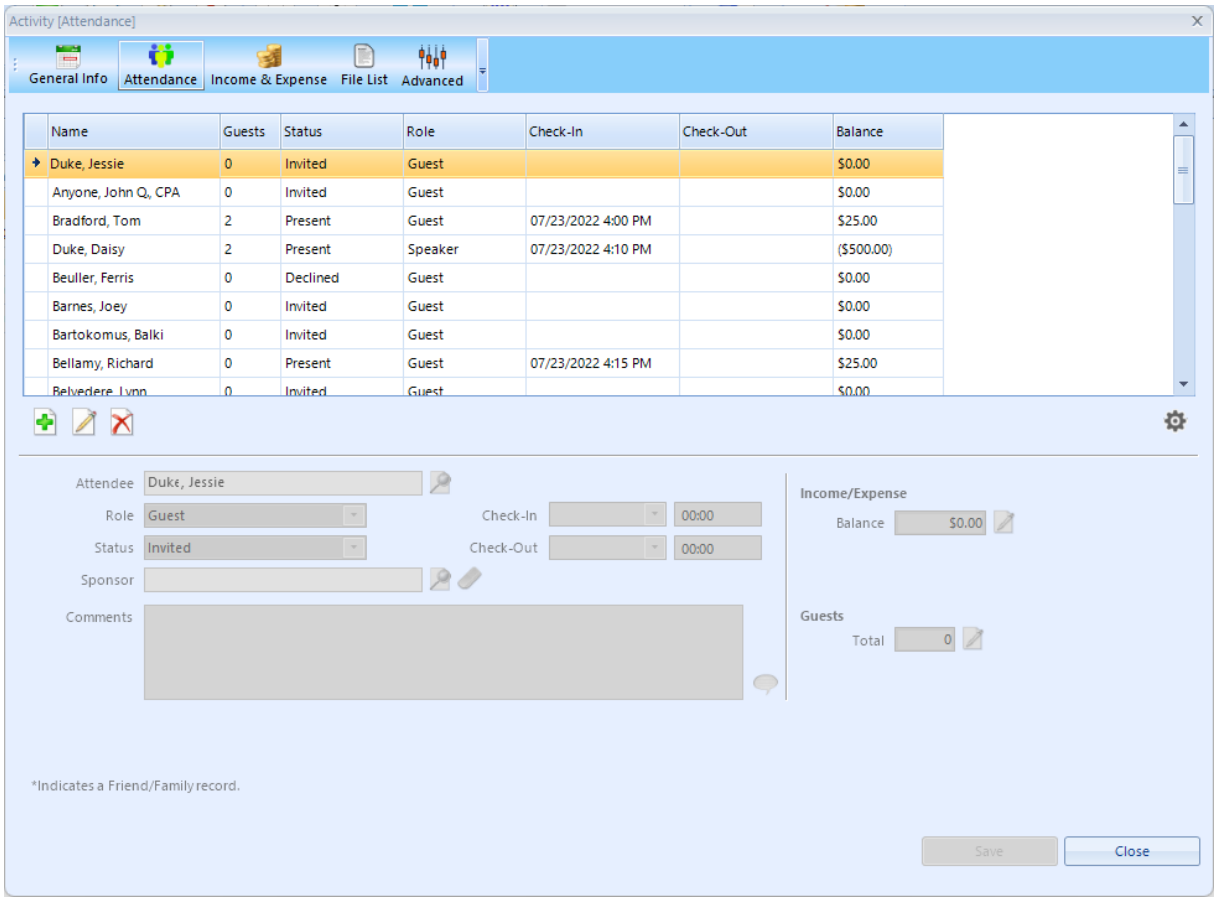
8.7.3 Attendance Page

With MemberTies Professional, you can keep track of all members who attend an activity, the role they played, what they spent, and their attendance status, and whether the brought any guests. This makes it easy to track things like "who was the host", "who declined to attend",

"who tended the bar", etc. The combination of member name, role, and status lets you easily track the people involved.

This page provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

To create a new record, click Add; or, select an existing record and click Edit, or Delete.



The count of attendees and guests is automatically updated on the General Info page as changes are made here.

Note: These instructions cover adding attendees individually from the Activity record itself. You may also add multiple members to an activity at once directly from the Membership List. See Adding Members to an Activity for details.

Working with Attendance

The following fields are available:

- Attendee - the field itself is not editable, but the search icon displayed to the right enables you to search for the attendee(s). The way the search works changes based on whether you are adding or editing:

  - Adding - When adding a new attendee, you can select multiple members from the quick search window, and all settings (role, status, dates, postings, guests) will all apply to each selected member. When you save, a new attendee record will be created for every selected record.
  - Editing - When editing an existing attendee, you can change the name but can only search for one record to replace it with. i.e., you can edit one record into multiple.

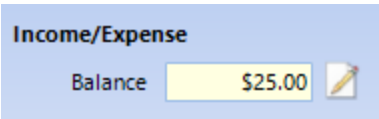
- Role - lists all Activity roles defined in the database. See Maintaining Activity Roles for information.
- Status - lists all Attendance Statuses currently defined in the database. See Maintaining Attendance Statuses for more information.
- Sponsor - enables you to select an optional sponsoring member for the attendee. Use the Choose Sponsor and Clear Sponsor icons next to the field to change the selection.
- Comments - additional details about this attendee
- Check-In - the date/time the person arrived at the activity
- Check-Out - the date/time the person left the activity
- Income/Expense Balance - displays the current balance of all postings tied to this attendee. See below for more information about adding Income and Expense entries.
- Guests Total - displays the count of guests linked to this attendee. See below for more information about adding guests.

Note: The attendee list also includes a right-click menu that has the following options:

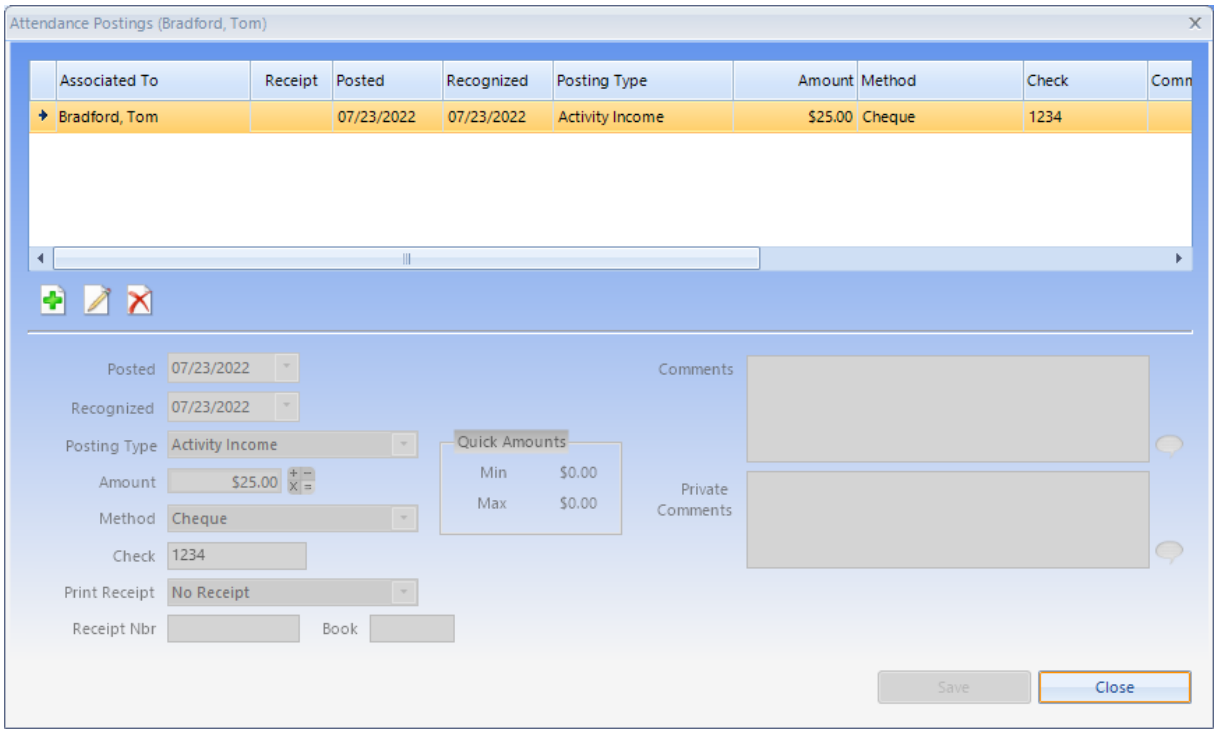
- Open Member - when a single row is selected, choose this option to open that member record for editing.
- Multi-Record Update - when two or more rows are selected, choose this option to make basic attendance changes to all selected rows. See Multi-Record Update for details.

Income and Expenses

Click the Edit icon next to the current income/expense balance to work with postings.



This will open the Maintain Attendance Postings window.



The following fields are available:

- Posted - the date on which the entry is being recorded
- Recognized - the date on which you want the amount to apply to your organization. Since most activities tend to start and end in a short time period, the date recognized will normally be the same as the date posted. But if you need to prepare for an activity during the latter part of one year but actually account for it the following year, you can use the date recognized to identify these entries. That way, a report run for the first quarter of next year will show an entry that was actually posted the year before.
- Posting Type - the posting type to be applied to this entry

  Note: The posting type will be defaulted to the default Activity posting type specified in the Posting Types list, if available. If no default has been set, the type will be blank. See Maintaining Posting Types for more information.
- Amount - The amount to be recorded. Only positive numbers may be used. The posting type determines whether the amount is applied as a debit or credit to the account.

  Note: The Quick Amounts section shows any minimum or maximum amount defined for the selected posting type. These amounts can be quickly entered by clicking the amount.
- Method - the payment method used. See Maintaining Payment Methods for more information.

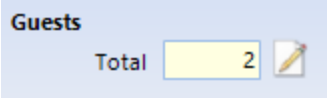
- Check - the cheque number or other payment identifier
- Print Receipt -controls when a receipt should be printed for the entry:
  - No Receipt - indicates that no receipt needs to be printed at all
  - Mark for Printing - indicates that the record should be marked so that you can run a receipt report from the Reports window, and use Activity Print Receipt as part of your report criteria to print all marked receipts at once.
  - Print on Save - indicates that a receipt will be automatically printed when the OK button is clicked to save the entry. Note that the system will automatically switch the setting to "No Receipt" after printing. You can also print a receipt by selecting the saved record on the Income/Expense list.
- Receipt Nbr/Book - these fields are enabled whenever the selected posting type is one that has been defined to generate a receipt number. The fields are disabled for all other posting types. The Receipt Number is a sequential number generated by the system. The Receipt Book is the value set in preferences.

  Note: The receipt number is not automatically generated until the record is saved or a Receipt is printed via the Receipt button. This ensures that the next receipt number is not used until it is needed.

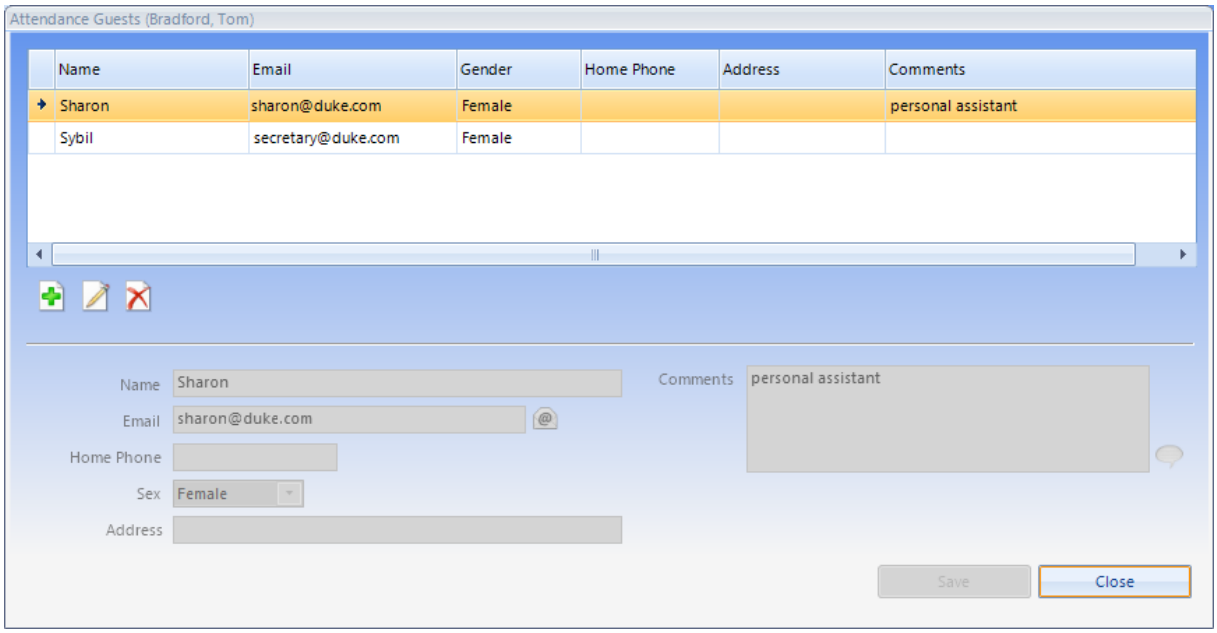
  Note: if the receipt icon is displayed next to the Book field, it enables you to force the system to generate the next receipt number immediately. Note that once a receipt number has been generated, it is "used" permanently, even if you choose not to save the entry. The only way to reset it is via the Receipt Book Numbers preference. If you want to "regenerate" a new number for an entry that already has a receipt number, you must clear the field first, then click Assign Now to generate a new number. If you do not want the Assign Now option to be available at all, it can be turned off via the Display Assign Now preference.
- Comments - general comments about the entry
- Private Comments - comments that will not appear on any system report

Guests

Click the Edit icon next to the current guest total to work with the guest list.



This will open the Maintain Guests window.



The following fields are available:

- Name - the guest full name

  Note: If all you care about is that the guest exists, this is the only field needed. Just enter a name and click save. That is enough to increase the guest count.

- All other fields are self-explanatory.

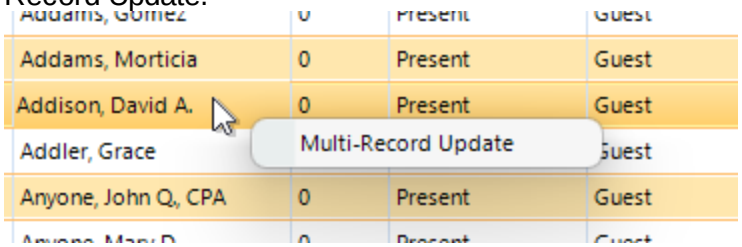
8.7.3.1 Multi-Attendee Update

When tracking attendance, some fields often need to be changed after the attendance record has already been created. When it affects a single record, the attendance record can be opened and modified normally. But when the same change needs to be made to multiple records, such as marking several people as "absent," for example, this becomes more time-consuming.

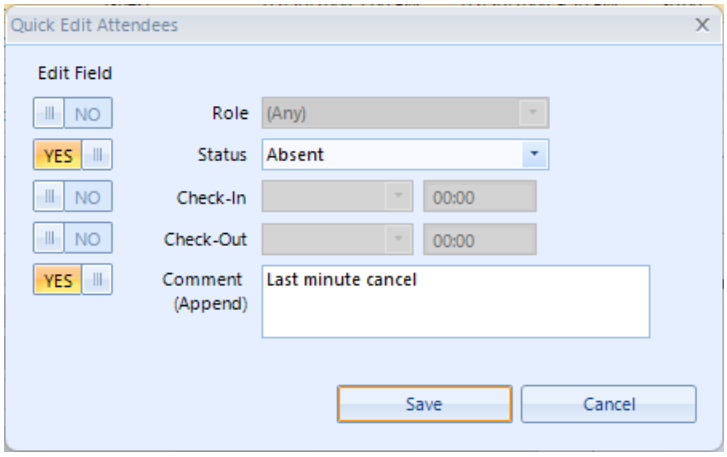
The Attendance Page includes a right-click menu option to simplify basic updates to multiple records.

Updating Multiple Attendees

1. Select two or more rows in the attendance list, then right-click and choose Multi-Record Update.



2. On the Quick Edit window, activate one or more fields for editing, and set a new value that will apply to all selected records.



Note that Comments are automatically appended to any existing comment on the record.

3. When finished, click Save.

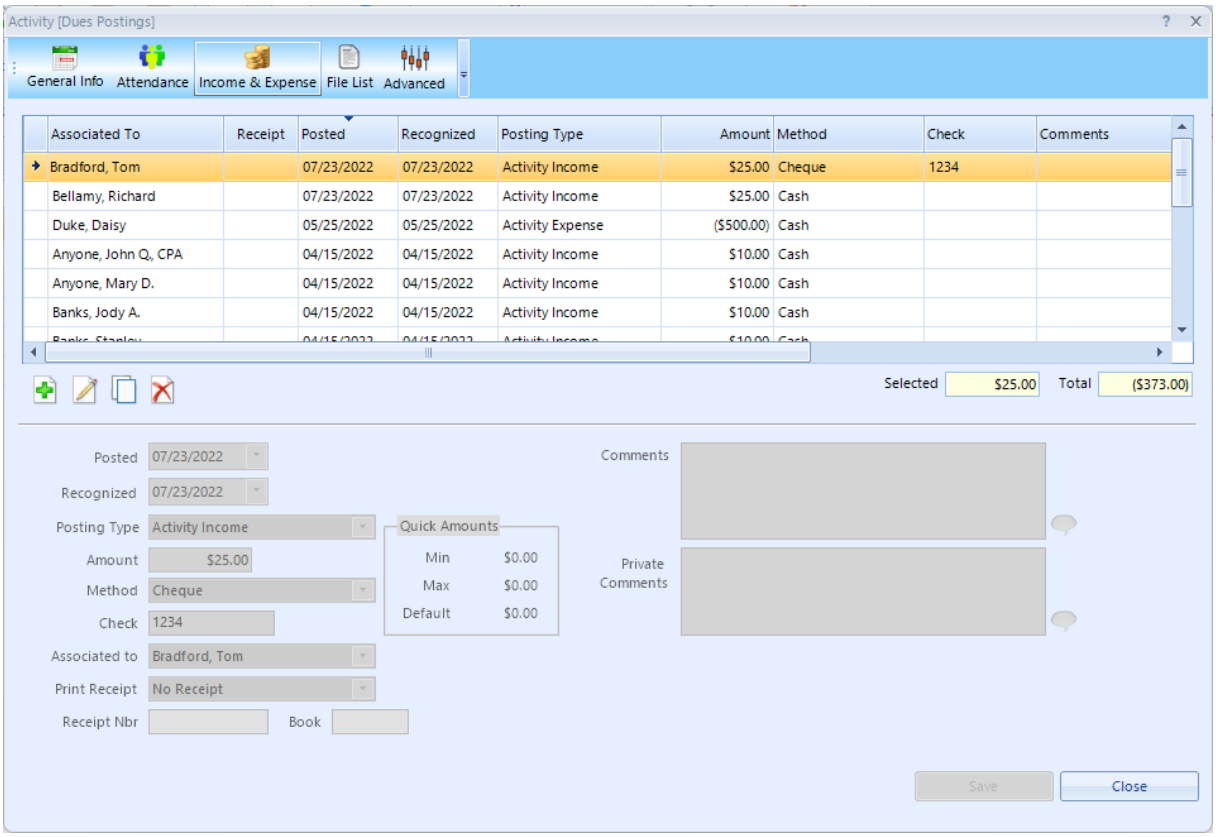
4. After saving, the system will automatically deselect the multi-row group and select only the first record.

8.7.4 Income & Expense Page

With MemberTies Professional, you can post debits and credits to activities just like you can post dues or donation debits and credits on membership records. Each entry can be associated with the activity itself, or specifically associated with an attendee. This page is almost identical to the page accessible from the Attendance page; the only difference is the "Associated to" field shown here.

This page provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

To create a new record, click Add; or, select an existing record and click Edit, Copy, or Delete.



The following fields are available:

- Posted - the date on which the entry is being recorded
- Recognized - the date on which you want the amount to apply to your organization. Since most activities tend to start and end in a short time period, the date recognized will normally be the same as the date posted. But if you need to prepare for an activity during the latter part of one year but actually account for it the following year, you can use the date recognized to identify these entries. That way, a report run for the first quarter of next year will show an entry that was actually posted the year before.
- Posting Type - the posting type to be applied to this entry

  Note: The posting type will be defaulted to the default Activity posting type specified in the Posting Types list, if available. If no default has been set, the type will be blank. See Maintaining Posting Types for more information.
- Amount - The amount to be recorded. Only positive numbers may be used. The posting type determines whether the amount is applied as a debit or credit to the account.

  Note: The Quick Amounts section shows any minimum, maximum, or default amount defined for the selected posting type. These amounts can be quickly entered by clicking the amount.

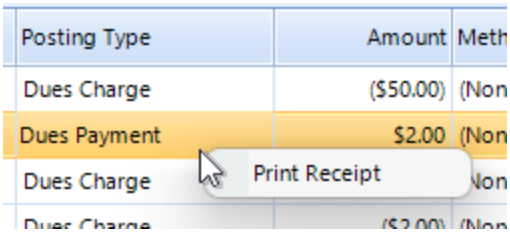
- Method - the payment method used. See Maintaining Payment Methods for more information.
- Check - the cheque number or other payment identifier
- Associated to - since this overall Income & Expense page covers the entire activity, a posting could be tied to an attendee, or it might just be for the activity overall. To assign the posting to a specific attendee, choose the attendee from the list.
- Print Receipt -controls when a receipt should be printed for the entry:
    - No Receipt - indicates that no receipt needs to be printed at all
    - Mark for Printing - indicates that the record should be marked so that you can run a receipt report from the Reports window, and use Activity Print Receipt as part of your report criteria to print all marked receipts at once.
    - Print on Save - indicates that a receipt will be automatically printed when the OK button is clicked to save the entry. Note that the system will automatically switch the setting to "No Receipt" after printing.
- Receipt Nbr/Book - these fields are enabled whenever the selected posting type is one that has been defined to generate a receipt number. The fields are disabled for all other posting types. The Receipt Number is a sequential number generated by the system. The Receipt Book is the value set in preferences.

  Note: The receipt number is not automatically generated until the record is saved or a Receipt is printed via the Receipt button. This ensures that the next receipt number is not used until it is needed.

  Note: if the receipt icon is displayed next to the Book field, it enables you to force the system to generate the next receipt number immediately. Note that once a receipt number has been generated, it is "used" permanently, even if you choose not to save the entry. The only way to reset it is via the Receipt Book Numbers preference. If you want to "regenerate" a new number for an entry that already has a receipt number, you must clear the field first, then click Assign Now to generate a new number. If you do not want the Assign Now option to be available at all, it can be turned off via the Display Assign Now preference.
- Comments - general comments about the entry
- Private Comments - comments that will not appear on any system report

Additional Dues Capabilities

- If the posting uses a Posting Type that can generate a receipt, you can right-click the entry in the list to print the receipt directly.



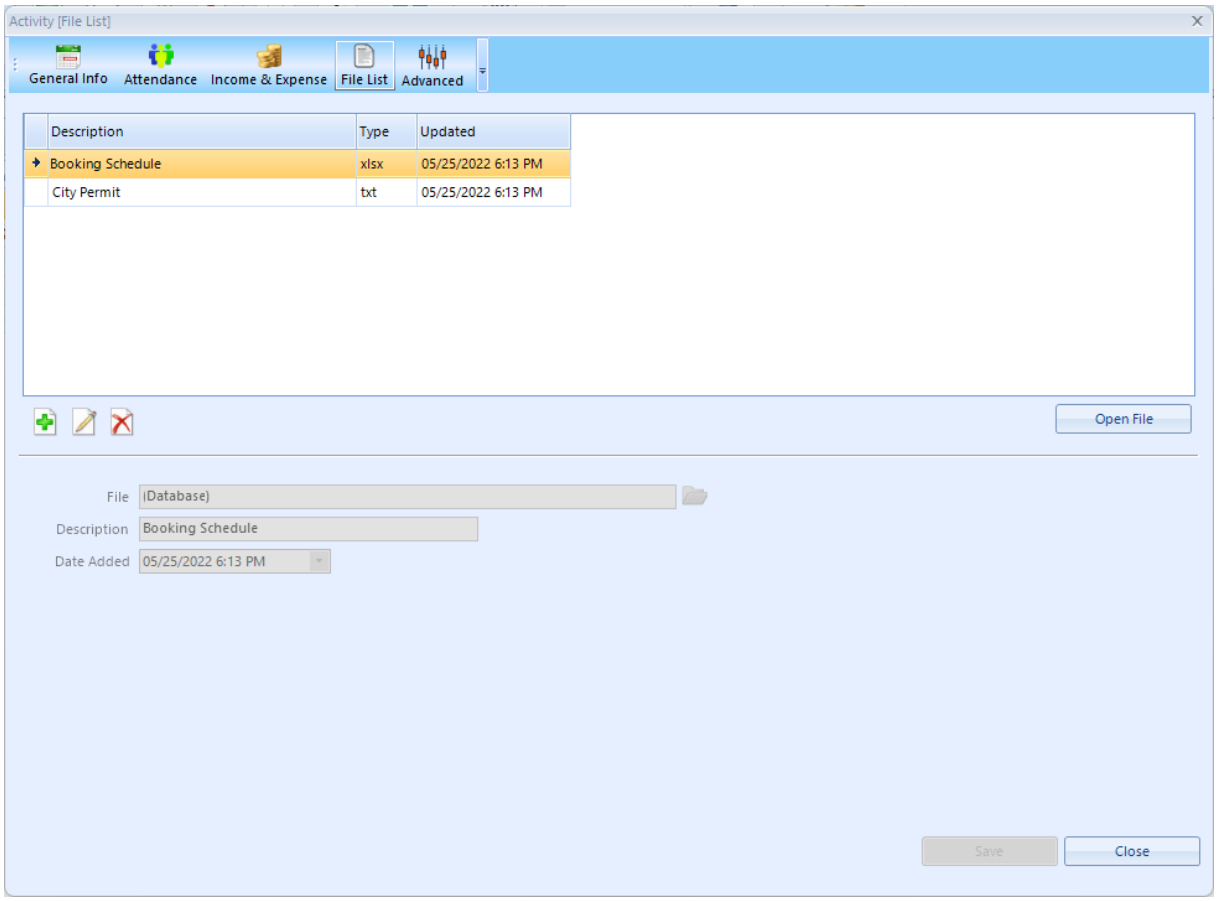
8.7.5 File List Page

You can link one or more files to an activity. This is convenient for things like activity ledgers, notes, maps, or any other file stored on your PC.

Note: Any file stored on your computer can be associated with the activity record. The file is either stored as a link to the physical file, or stored in the database, depending on the File & Photo Storage database preference. If you are storing files and photos in the database, be sure to keep file sizes as small as possible to avoid dramatically increasing the database size.

This page provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

To create a new record, click Add; or, select an existing record and click Edit, or Delete.



The following fields are available:

- File - click the folder icon to the right of the field to select a file from your computer or network. After selecting, the system will try to use the file name as the description, and the full path will appear in the field.
- Description - you can keep the suggested name or enter your own description for the file
- Date Added - defaults to the current date, but can be changed.

When you save your changes, the system checks your File and Photo Storage preference. If the preference is set to store the file in the database, the file size is checked against the limit set in the preference, and if acceptable, the file is converted, stored and "(Database)" displays as the new file name to indicate the storage location. If the preference is set to keep the file on your computer, the full path will remain.

Note: If a record is deleted from the File List it will not affect a physical file located on your computer. The deletion only removes the database record.

8.7.6 Advanced Page

With MemberTies Professional, you can setup some advanced options on the Activity Details window that will apply to the Front Desk check-in / check-out process. To access advanced options, click the "Advanced" button on the activity window.

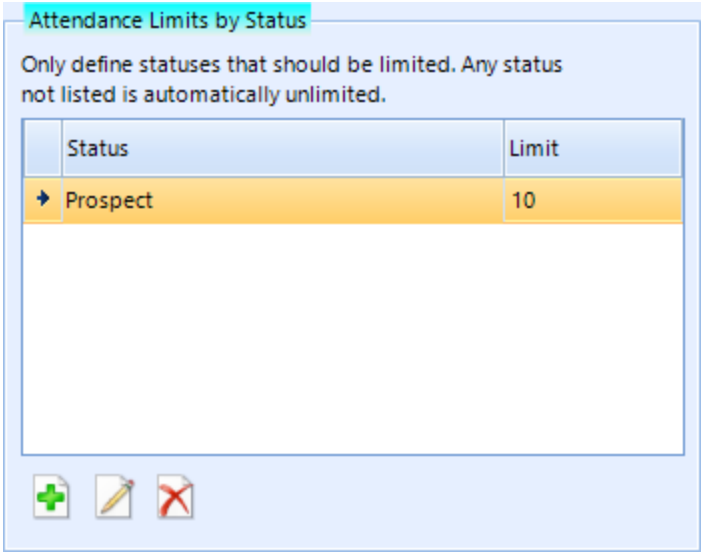
This page is divided into three sections, as described below.

Attendance Limits

Any status can be set to restrict the number of times a member with that status can attend the activity.

Any status that is not listed is assumed to be unlimited. A limit of zero effectively denies members with that status access to that activity.

To create a new record, click Add; or, select an existing record and click Edit, or Delete.



The following fields are available:

- Status - the status to which the limit applies
- Limit - the maximum number of times a member with the selected status can attend this activity

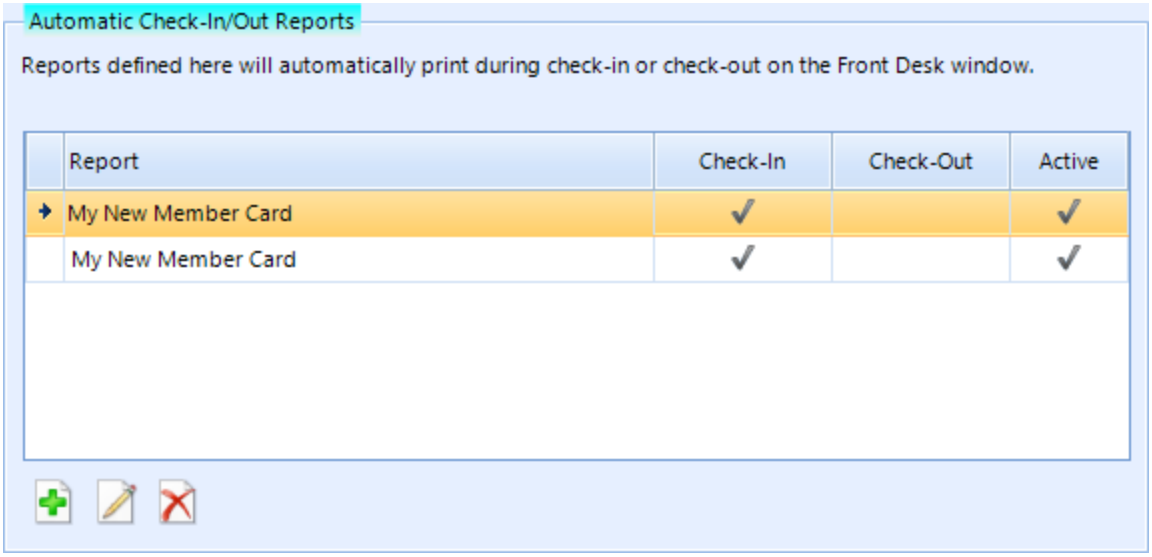
  Note: An attendance limit can also be defined on the Status itself (see Statuses). Any limit defined at the status itself takes priority over a per-activity status defined here. So if the "Regular" status itself is set to a maximum of 5, a member with this status will never be able to attend more than 5 *total* activities and will never reach the limit of 10 defined here.

Automatic Check-In/Out Reports

This option enables you to specify one or more reports that will automatically print for the attendee upon check-in and/or check-out via the Front Desk.

You can select from any user-defined membership or activity report, but keep in mind that the report will run as if you had entered the attendee as criteria. It will only print one record. This option is designed for printing a name card at check-in, for example.

To create a new record, click Add; or, select an existing record and click Edit, or Delete.



The following fields are available:

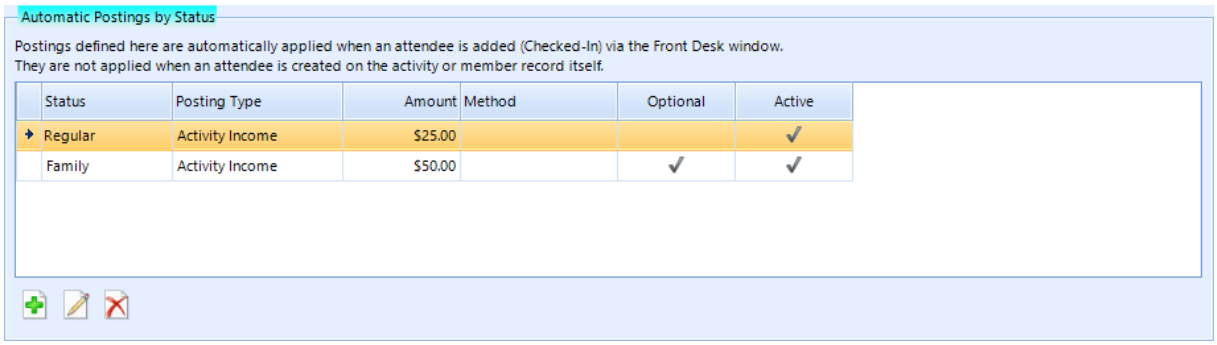
- Report Name - lists all available user-defined reports
- Print at Check-In - select this option to generate the report at check-in
- Print at Check-Out - select this option to generate the report at check-out
- Active - this option enables you to turn off a report without losing your settings

  Note: Both the "Include in Mailings" and "Include on Reports" settings for members are ignored when printing check-in/check-out reports, unlike printing from the reports window where the flags are applied automatically unless overridden in your search criteria.

Automatic Postings

This option enables you to default specific charges based on the membership status of the member being checked in.

To create a new record, click Add; or, select an existing record and click Edit, or Delete.



The following fields are available:

- Posting Type - the activity posting type to use for the entry
- Amount - the amount to post
- Method - the payment method
- Check - the cheque number or other identifier
- Apply To - the status of an attendee for which the posting will be created

  Note: A special status option is available for "Any Undefined Status." If this is used, it will be applied whenever an attendee has a status that doesn't have a specific amount associated with it.

- Comments - general comments
- Optional - indicates whether the automatic posting can be overridden. If enabled, the posting fields on the Front Desk window will remain enabled for editing. If disabled, the fields will not allow changes.
- Active - enables you to turn off the posting without losing your settings

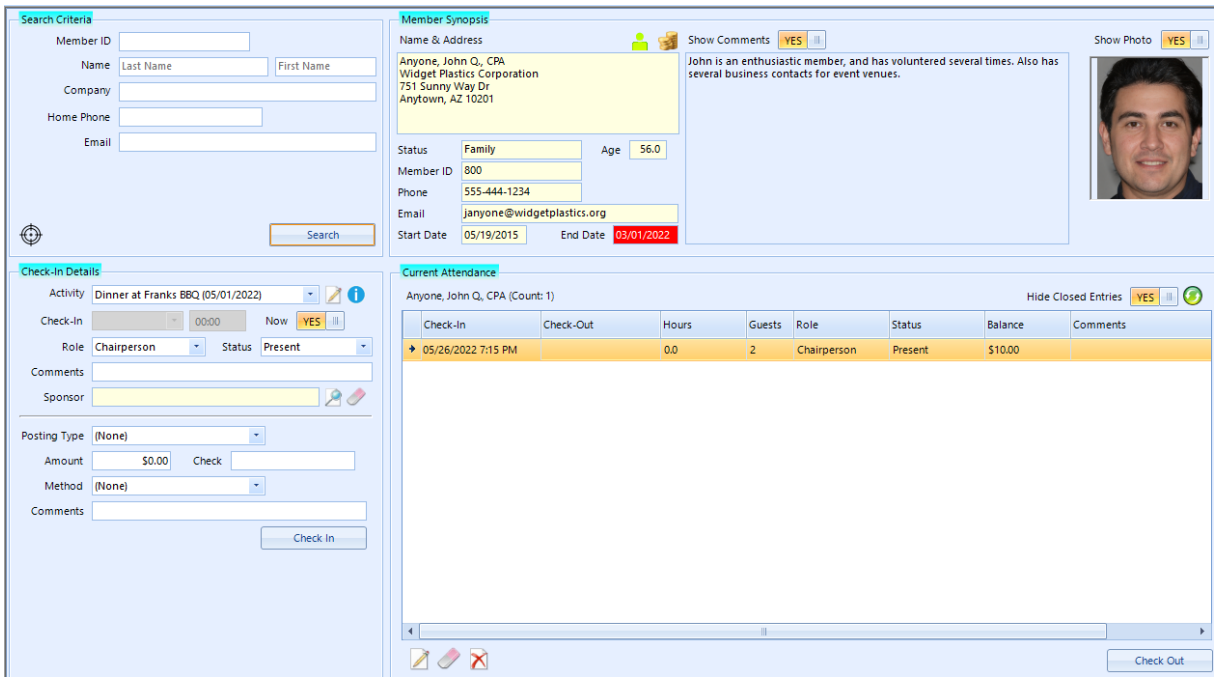
8.8 Using the Front Desk

8.8.1 Front Desk Overview

With MemberTies Professional, you can use a special "Front Desk" window to quickly search for members and check them into and out of activities.

The Front Desk window is designed to simplify the use of bar-coded membership ID cards. (The assumption is that the ID cards contain a bar code with an ID encoded, and that the encoded ID matches the Member ID on some member record).

There is no requirement to have an ID card to use the Front Desk window. You can manually enter a value in any of the search fields.



In this example, a search was made for John Q Anyone, and he was checked in to the activity.

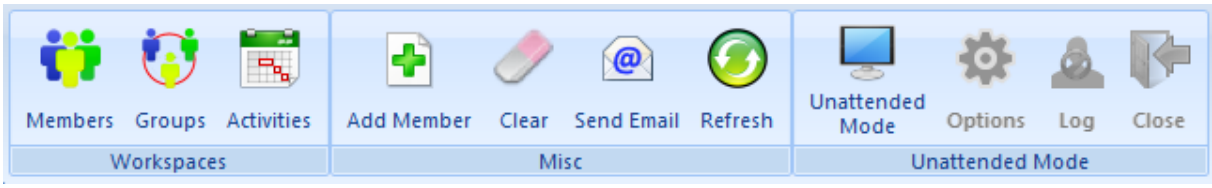
The Front Desk window appears to have four parts, but it is really divided into "search" at the top, and "check-in" at the bottom.

- The Search area (top half) is dedicated to searching for and displaying brief details about a member or family member, prior to checking them in.
- The Check-In area (bottom half) is dedicated to defining check-in details and actually checking someone in (or out) of an activity.

Complete details are found in the Search and Checking In/Out topics.

8.8.2 Front Desk Ribbon Bar

The ribbon enables you to access all front desk functionality, plus includes quick access to some workspaces commonly needed from the Front Desk, for checking records, etc.



The Front Desk Ribbon

The general use of each button is described below. Click any option to go to the help for that area.

- Members* - shortcut to the Members workspace
- Groups* - shortcut to the Groups workspace
- Activities* - shortcut to the Activities workspace
- Add Member* - enables quickly adding a member without going through the Membership list
- Clear* - resets the current search criteria for a new search (the same as pressing the ESC key)
- Send Email* - opens the email window, addressed to the member displayed in the synopsis
- Refresh* - refreshes the activities available in the Check-In Details activity list. Use this if activity settings were modified while the Front Desk window was open.
- Unattended Mode* - replaces the Front Desk display with the Unattended Mode display.
  Note: When this mode is active, no other ribbons or menus will respond.
- Options++ - configures options that control the behavior of the unattended window. (This button is only available when Unattended Mode is active.)
- Log++ - opens the log of "Not Found" check-in attempts. i.e., the list of attempts to use an invalid ID to check in via the unattended mode window. (This button is only available when Unattended Mode is active.)

  Note: The "Use Not Found Log" option must be enabled for the log to track anything.
- Close++ - Closes the window and returns to the Front Desk display. (This button is only available when Unattended Mode is active.)

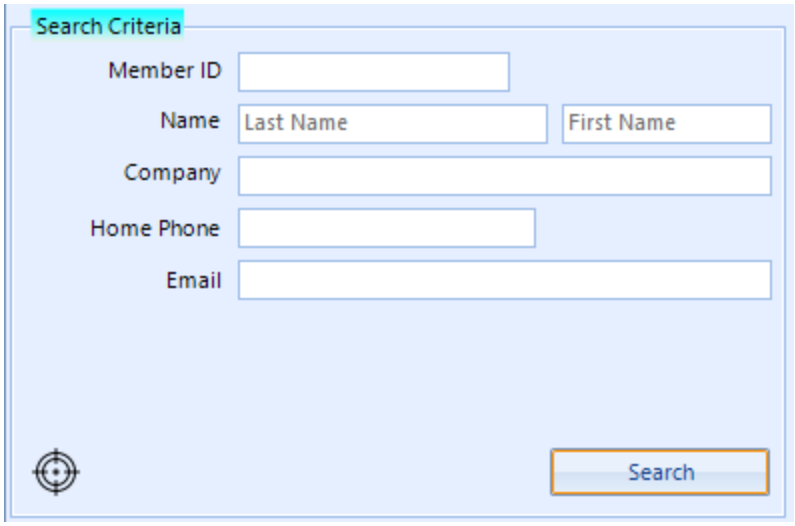
* This option is only available when Unattended Mode **is not** active.

++ This option is only available when Unattended Mode **is** active.

8.8.3 Searching

The search criteria area works just like other MemberTies search windows. You can enter one or more criteria values, and when you click the Search button, the system will try to find the matching record.

If you have the member ID on a bar-coded membership card, you can leave the cursor in the Member ID field, and when the card is scanned, the system should automatically display the member if the ID matches a record in the system. The bar code needs to contain the exact matching member ID, and the scanner you use needs to terminate the scan with a "carriage return" or "enter key". This simulates you pressing the Enter key on your keyboard, which triggers the Search button.



Setting a "Favorite" search field:

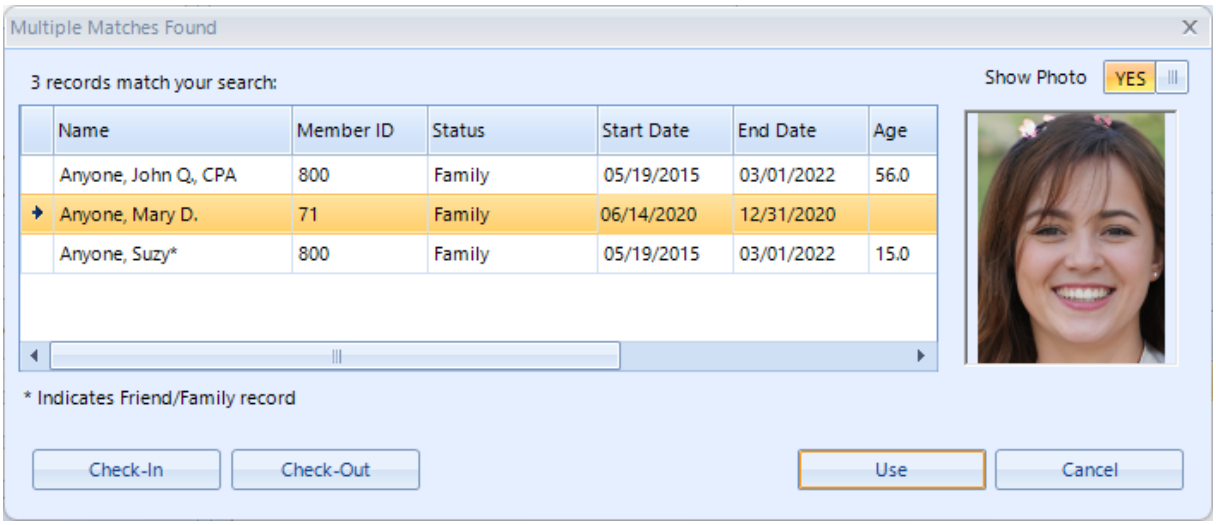
The "target" icon in the lower left of the Search Criteria section enables you to choose the search criteria field the cursor should return to when you press the Escape key or complete a successful Check In (if the Reset on Check-In preference is turned on).

If you're using a scanner to display membership records, you can essentially scan the card, review the member, click "Check In," and the cursor will immediately return to the favorite field with the screen reset for the next person. If, for some reason, the cursor needs to return to the favorite field sooner, you can press the [ESC] key to force it. To set the favorite field, put the cursor in the desired field, and click the icon.

Note: You can specify certain custom fields to be displayed below the existing search fields. Normally one or two fields will fit, but if you have a large monitor you may be able to add more. Use the Custom Field maintenance window to mark a field as usable for Front Desk searches. See Maintaining Custom Fields for more information.

Multiple Matching Records

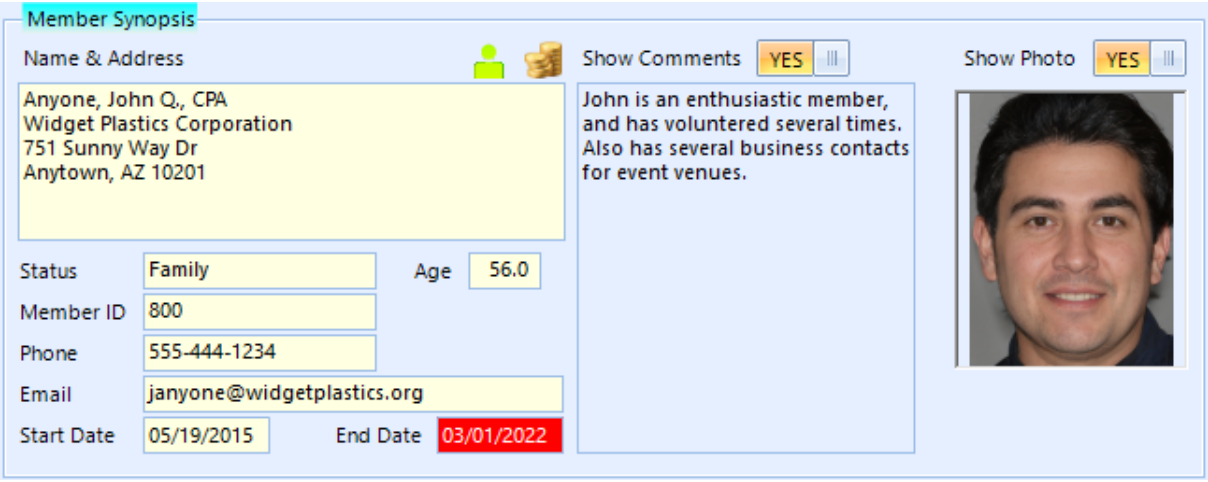
If more than one record matches the search criteria, a list of matching records will be displayed so you can choose the desired record to use, or just check one or more in immediately:



Options on this window:

- Check-In - Enables you to check-in one or more records automatically, without ever displaying them on the main window. Note that if you select a record that is already checked in, the resulting behavior depends on your Front Desk preference settings. The system may ignore it, prompt you, or allow it to be checked in a second time.
- Check-Out - Enables you to check-out one or more records, similar to the Check-In option above. This options works like the unattended mode check-out, in that it finds all open (not-checked-out) attendance entries for the member on the current activity and closes them.
- Use - Displays the selected record in the Member Synopsis area, ready to be checked-in. This happens automatically when your search only yields a single matching record.
- Show Photo - controls whether the photo is displayed
- Friend/Family members are shown with an asterisk (*) next to their name. Note that a family member has to have "Allow Check In" set to Yes on their record in order for the search to find them. See Member Friends and Family for details.

Member Synopsis (the search results)



The Member Synopsis provides basic membership information at a glance. The information displayed in the Member Synopsis can be limited by the Limit Synopsis Data preference.

In this area:

- The Person icon - located just above the name & address area, enables you to open the member record for editing
- The Money icon - located next to the Person icon, enables you to post new dues or donations entries for the member (the availability of this icon is controlled by the Allow Dues Entries preference)
- Show Comments - controls whether comments from the member record are displayed
- Show Photo - controls whether the member photo is displayed
- End Date - the End Date field will display in red when the date is in the past (i.e., an expired member)

  Note: Two system preferences apply to checking-in a person with an expired End Date:

  o The End Date Validation preference will prevent the check-in entirely.

  o The End Date Warning preference is similar, but will cause a pop-up message to display a warning, while allowing the checked-in to continue.

- Double-click the photo to view a full-size version.

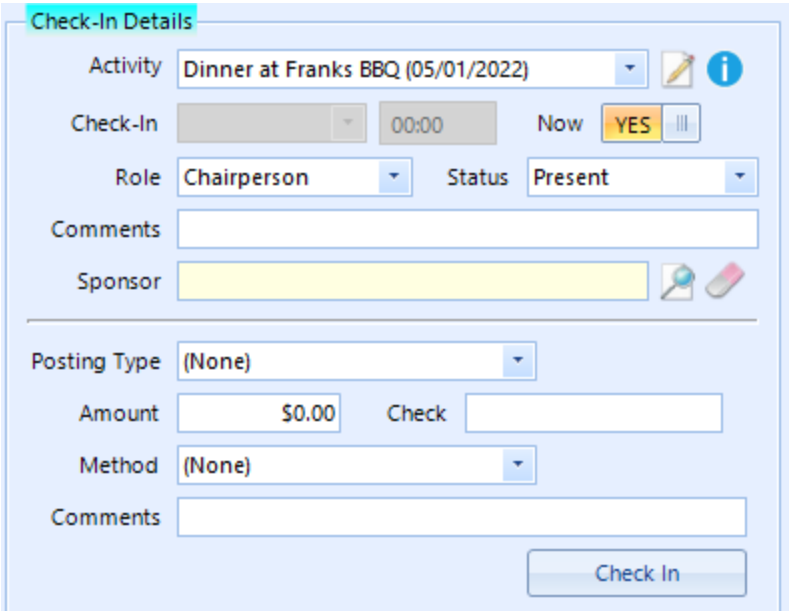
8.8.4 Checking In/Out

Once the member or family member record has been selected and is displayed in the Member Synopsis area, it is ready for check-in or check-out, as appropriate.

This section controls the process of actually assigning a member to an activity. When the member checks IN, the start date and time are set. When the member checks OUT, the end

date and time are set. The attendance entries for the currently selected person, for the current activity, are displayed in the Current Attendance list on the right. In addition, the number of times the person has attended an event with the same type is shown above the list.

Activity Check In Details



This area enables you to define the activity, how the new attendee will be added (what role, status, etc), and any posting that should be created automatically when they check-in.

The following fields are available:

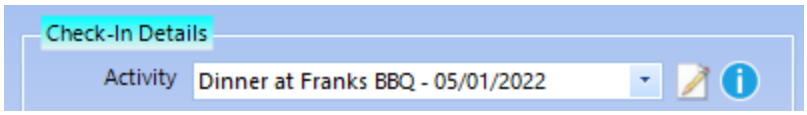
- Activity - lists all activities that are "active". An activity is listed if the today's date falls within the activity start and end date range. (If the activity has no start date or end date, the missing start or end date is replaced with, "1/1/1900" and "12/31/2999," respectively, for this determination.)
- Check-In (date and time) - by default, the "Now" switch is set to Yes, and these fields are then disabled so the system can automatically use the current date and time. If you would prefer to enter the date and time manually, turn off the switch.
- Role - lists all available activity roles
- Status - lists all available attendance statuses
- Comments - additional details about the attendance entry
- Sponsor - enables you to choose (or clear) an optional sponsoring member for the attendee. i.e., if a person is attending with the support or "sponsorship" of an existing member, this will create the link between attendee and member.

- Posting Type - lists all available activity posting types. If everyone coming to the activity must pay $15.00 to get in, for example, setting this field to "Activity Income" and the Amount field to $15.00 will streamline the recording of incoming fees by automatically entering that amount for each attendee.
- Amount - the amount to post
- Check - the cheque number or other payment identifier
- Comments - additional details about the posting

Notes:

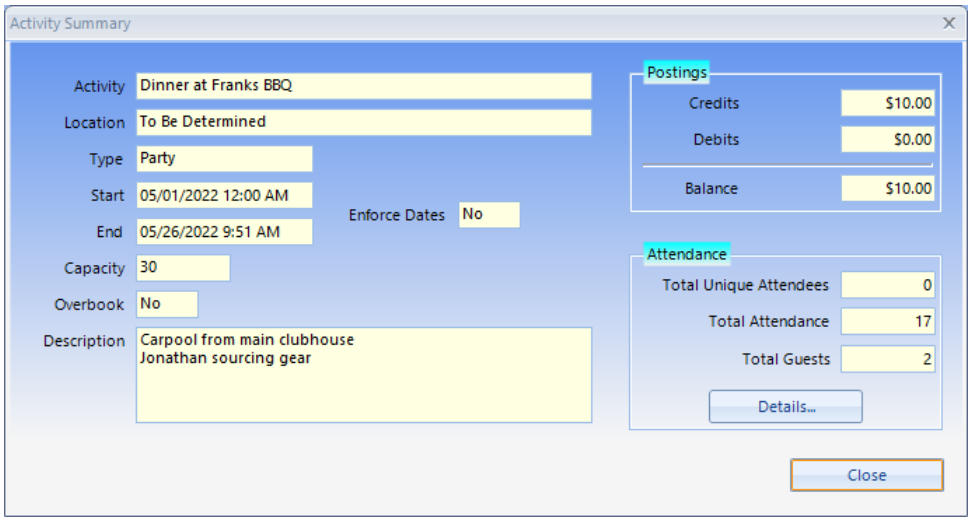
- If automatic postings have been defined for the activity, these fields may be filled in automatically and disabled. For details, see Advanced Options for the activity.
- If you want to be warned when checking-in a person who is already checked-in to the activity, turn on the Multiple Check-In Warning preference.

Showing the Activity Summary



Two icons to the right of the Activity field enable access to additional activity information.

- The Edit icon will open the full activity for editing.
- The Information icon will open a window displaying a synopsis of the activity, and the current number of attendees checked in or out.



Click the Details button to show additional attendance information.

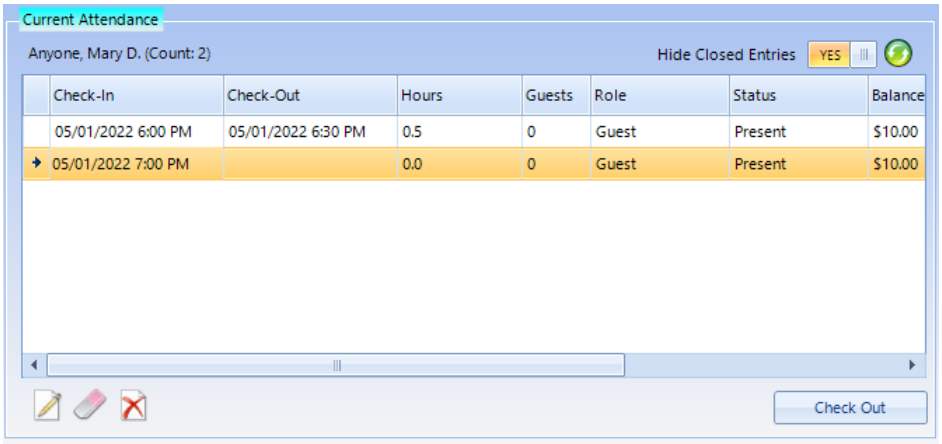
Checking In an Attendee

Once a member has been selected and Check-In details are ready, click Check In to create the attendee record for the activity. An attendee record will be created and added to the Current Attendance list, and any automatic check-in reports will be generated and displayed.

Note: If the member is already checked in to the current activity, you will be prompted to confirm an additional entry.

Checking Out an Attendee

The Current Attendance section shows the attendance of the member on the current activity.



The following options are available:

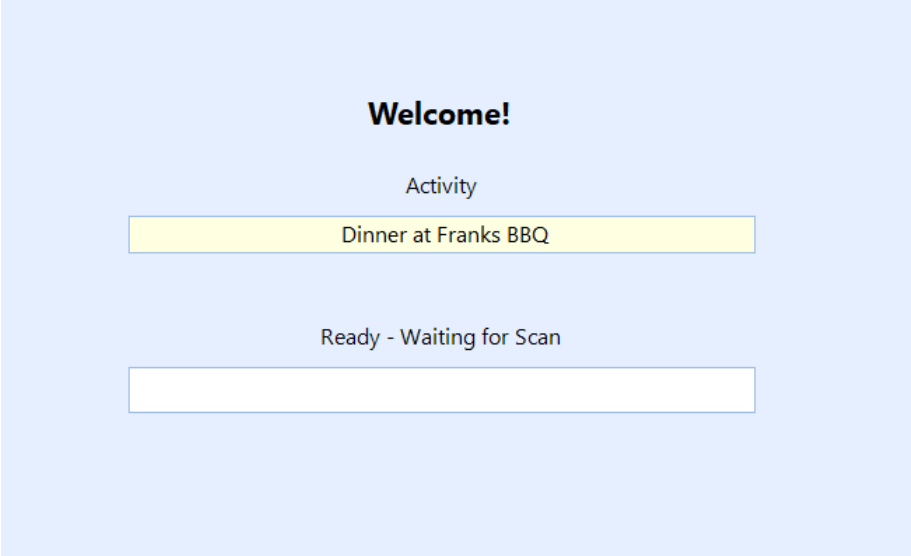
- Hide Closed Entries - if the activity is on-going, there may be check-in/check-out data from multiple days. Turning this option on will hide any entry that has a Check-Out date
- Refresh - refresh the list. If people are being checked-in on multiple computers, this will help display current data
- Edit - opens a window to allow changes to the attendance entry
- Erase (clear check-out) - erases the Check-Out date for the selected record(s)
- Delete - deletes the selected attendance record(s) entirely
- Check Out - sets the Check-Out date to the current date and time and generates any automatic check-out reports

8.8.5 Unattended Mode

If you have membership cards created with a Member ID barcode, and those IDs have been entered on the corresponding membership records, you are ready to let people check in or out of an activity without intervention by you. This means you could setup a card reader at the entrance to an activity, and as people scan their cards, MemberTies will automatically find the appropriate membership record and create an activity attendance entry for them (in Check In mode) or check them out of the activity (in Check Out mode). A third option, "Smart Mode", lets the system determine whether to check them in or out.

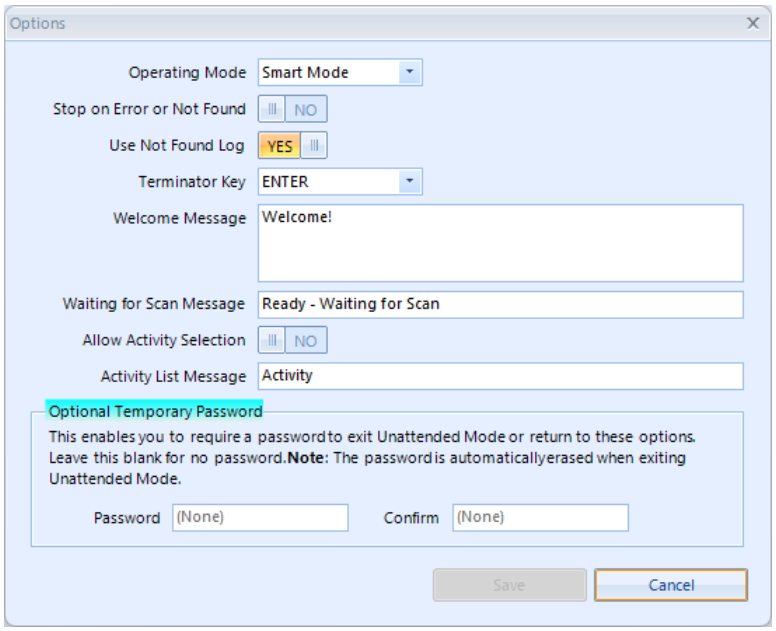
The Unattended Mode section of the Front Desk ribbon is enabled when using this mode, and the rest of the ribbon is unavailable.

Unattended mode is an extension of the Front Desk window. It uses the check-in settings defined on the main window. Only the activity can (potentially) be changed (see Options below)



There are several options that should be verified or set to control the behavior of this mode, including a temporary password, logging options, and more.

Configuring Options



The following fields are available:

- Operating Mode

  o Check-In - each scan will create a new check-in for the member

  o Check-Out - each scan will find and close any open check-ins for the member

  o Smart Mode - each scan will cause the system to check whether any open check-ins exist. If found, they will be checked-out, otherwise, a new check-in will be created.

- Stop on Error or Not Found - controls whether the Unattended Mode window will stop allowing scans when an error occurs or a record is not found. If this is not selected, a message will be displayed briefly that no match is found, and then the system will accept the next scan.

- Use Not Found Log - controls whether invalid searches are logged to the Not Found log. This enables you to then click the Log button on the ribbon or run the Activity Check-In Not Found report to find ID issues. Note that you can delete log entries via the window accessed via the Log button.

- Terminator Key - Most bar code readers can be set to send a specific key press after each scan, typically an Enter key or a TAB key. Identify the type of key the system should treat as the end of the scan. If you are not sure, leave it set to the Enter key.

- Welcome Message - Sets the large welcome message displayed in the top portion of the window. The default text is, "Welcome!". This message will hold several lines of text if desired, though the limit is 50 total characters.

- Waiting for Scan Message - the text that displays briefly while the system is waiting for the next card to be scanned. The default text is, "Ready - Waiting for Scan"

- Allow Activity Selection - Select this option to display a search icon next to the read-only Activity field. Users can click this icon to open another window to quickly change the activity prior to scanning their card. (For example, if members are coming in to work on one of several projects, this option will allow them to choose the project in question before scanning their card.)

- Activity List Message - Sets the text displayed above the Activity field. For example, "Choose Activity..."

- Optional Temporary Password - enables you to secure the window in this mode so someone cannot easily close it and access the rest of the system. You will be prompted to enter the password if you try to click Close.

  Note: When the Front Desk window is closed, any temporary password is erased. However if you return to Unattended Mode before closing the Front Desk window, you will be asked whether to continue using the existing password.

Testing a Scan

1. Verify and save Options if you haven't already done so.

2. Scan a card to be sure the system can recognize the input.

   - If nothing appears on the screen, be sure everything is connected correctly and that the scanner is properly set up.

   - If the member ID appears, but nothing happens, be sure the scanner is set up to terminate the scan with an Enter or Tab keystroke, and that the appropriate Terminator Key has been specified on the Options window.

   - If a "Not Found" message appears, try typing the ID manually into the scan field and press Enter. If the record is found, then there is a problem with the output of your scanner. If the record is not found, verify that a member record actually exists with that exact Member ID. If it does, contact Support.

Ending Unattended Mode

Click Close on the ribbon to return to the Front Desk. If you have defined a password via Options, you will be prompted for it.

Part IX

Addresses

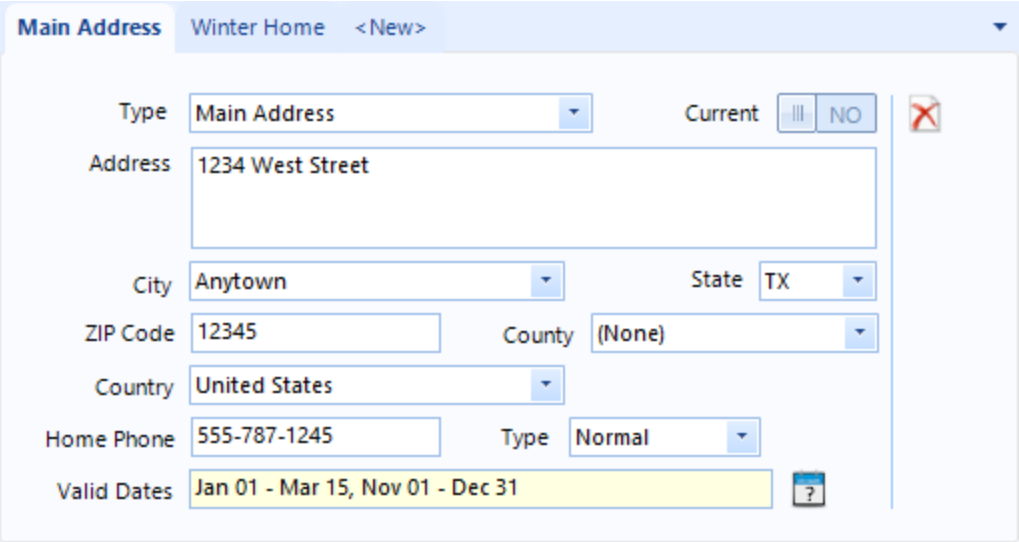
9 Addresses

9.1 Address Overview

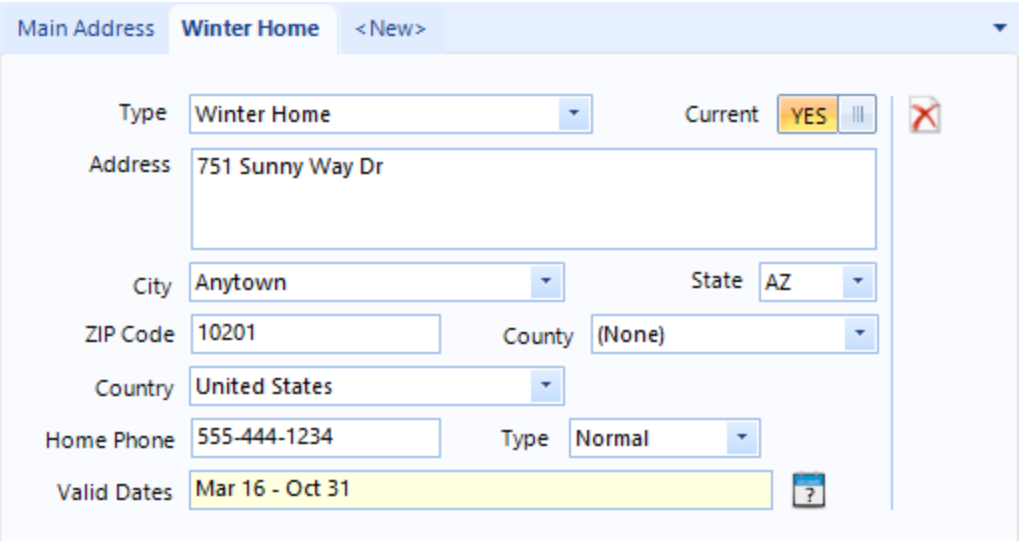
Member and Group records support addresses.

The standard version tracks a single address. The professional version enables you to create multiple addresses by clicking the "<New>" tab. In this case we created a second address called Winter Home.area that supports a single address (for the standard version) or multiple addresses (for the professional version).

The two versions of the address area are shown below



Standard Version Address



Professional Version Address

Note: The word "State" changes to "Province," and "ZIP Code" changes to "Postal Code" if the Language preference is not US English.

The following fields on the address need a little more explanation:

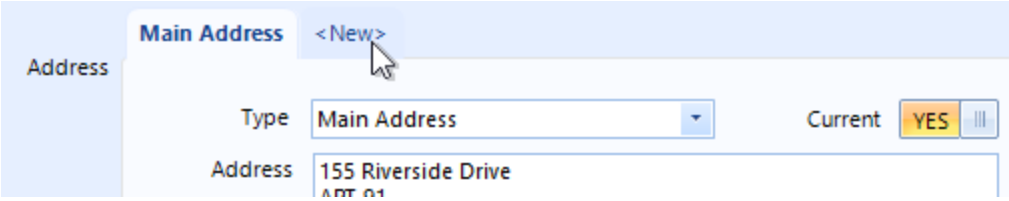
- Type - each address must be given a type that can be used as report criteria. (This is most useful in MemberTies Professional where multiple addresses can be created for each membership record, because it enables you to run a report to find anyone with a "Work Address" located in "My Town", for example.
  - In the Standard version, the type is assigned in the Address Type miscellaneous preference.
  - In the Professional version, a you can choose from the list of Address Types. See Address Types for more information.
- Address - the complete "street address," excluding geographic data like city, state, etc. Multiple lines are allowed. For example,

```
100 Main Street
Apt 6
```

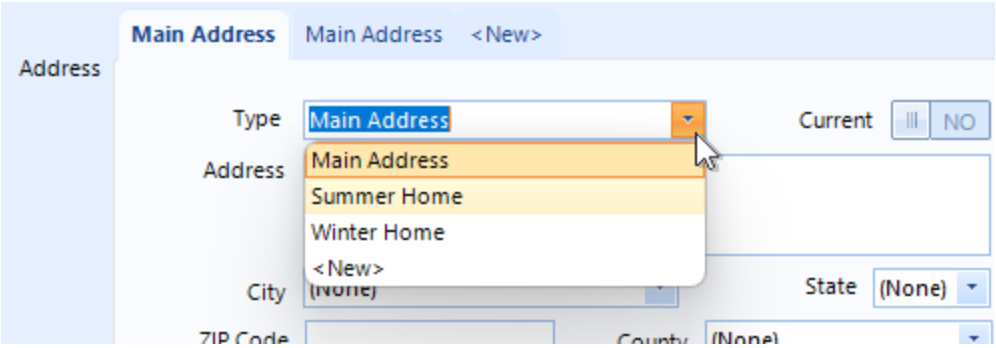
- City - lists all cities that are defined in the database. Values can be preloaded, but new entries can also be entered and you will be prompted to add the new entry to the list. The city marked as the default will be used automatically on new address records. See Cities for more information.
- County - lists all counties defined in the database. Values can be preloaded, but new entries can also be entered and you will be prompted to add the new entry to the list. The county marked as the default will be used automatically on new address records. See Counties for more information.
- State - lists all states/provinces defined in the database. The State marked as the default will be used automatically on new address records. See States for more information.
- Country - lists all countries defined in the database. The Country marked as the default will be used automatically on new address records. See Countries for more information.
- Date Ranges* - If a record has addresses that are valid only at certain times of the year, you can have the system automatically keep the proper address current by creating one or more date ranges within which each address is valid (see below).

Adding a New Address

Each address displays in its own tab. To add a new address, click "<New>" and a new tab will appear.



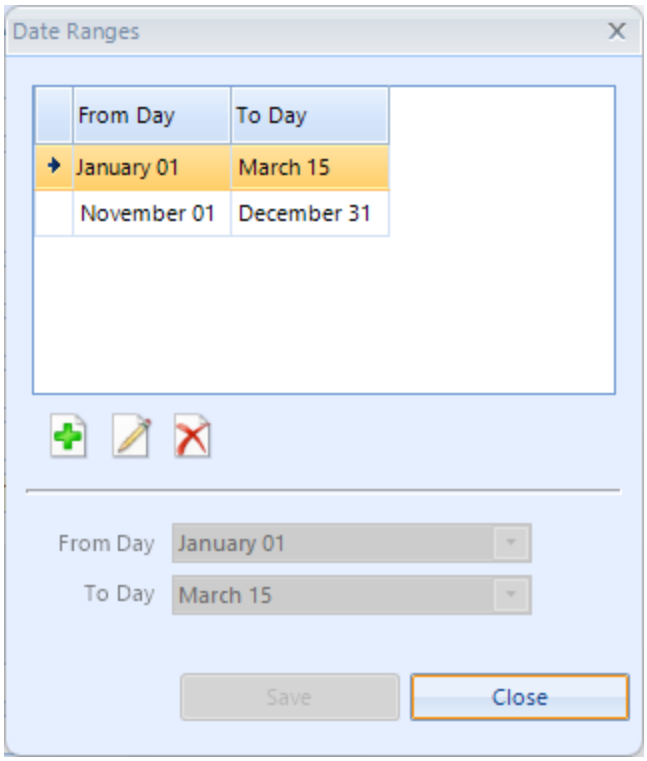
The new address is created with the default Type. Change the type to whatever is appropriate.



Using Date Ranges*

In some cases, the additional addresses may be specific to a summer/winter home, or home/school address, where you know an address is valid during a certain period of the year. Clicking the calendar icon next to the Valid Dates field enables the assignment of the date range. Once set, the system will use the date range to decide which address is active.

This window provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.



Crossing Years

When a date range crosses one year to the next, i.e.,

```
November 01 - March 15
```

the system will notice this when you save, and it will automatically split it into two entries:

```
November 01 - December 31
January 01 - March 15
```

Note: if you use a date range for **any** address on the record, you must ensure that **all** days of the year are covered with one address or another.

Ensuring that all days are covered allows the system to automatically set the appropriate address as Active based on the day of the year. Addresses using date ranges are re-evaluated every time you log in.

* Professional Version Only

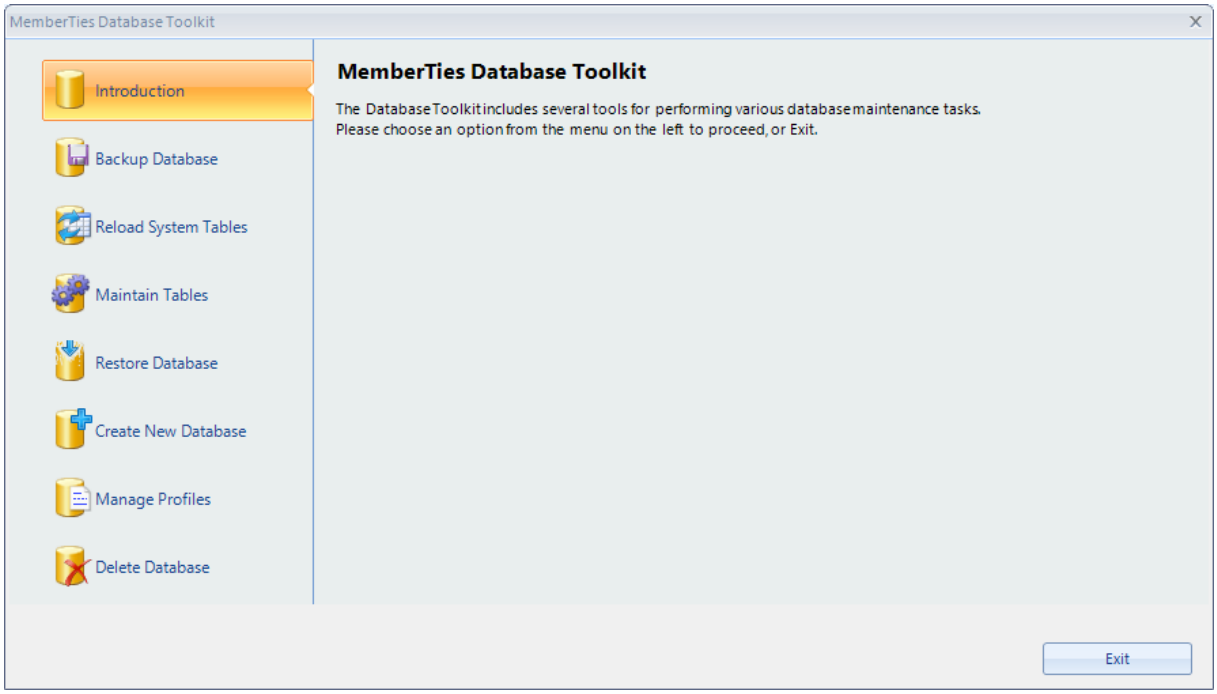
Part X

Database Toolkit

10 Database Toolkit

10.1 Overview

All database-related tasks are available via the Database Toolkit, including creating, deleting, and restoring database, and more. The program is accessible via the MemberTies program group on your Start menu, or if you are logged in as the administrator user, via the Database Toolkit button in the Administrator Tools section of the the Home ribbon bar.



Note: The Database Toolkit program itself is the mt.DatabaseToolkit.exe program in the installation directory, and it can be removed if users should not have access to it.

The following tools make up the Toolkit:

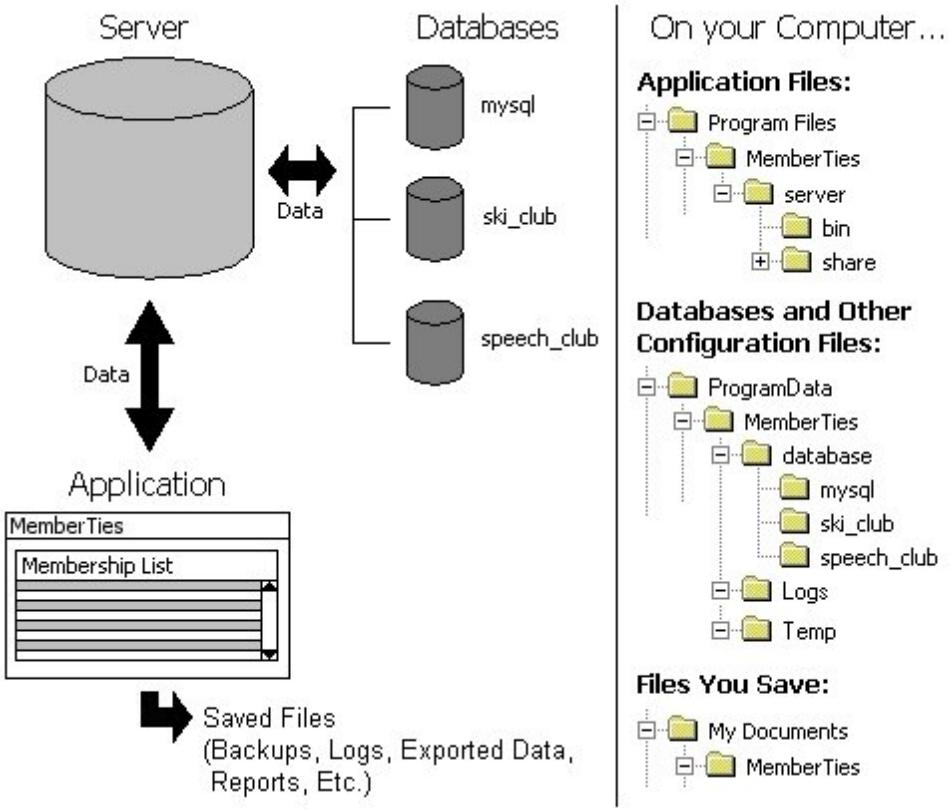
- Backup Database
- Restore Database
- Reload System Tables
- Maintain Tables
- Restore Database
- Create New Database
- Manage Profiles

- Delete Database

10.2 Server and Database Overview

This topic is designed to provide an informational overview of the entire database system that is MemberTies. You don't absolutely have to understand everything to this level of detail in order to use the system, but we wanted to provide the information in case you were interested.

It's easy to think of MemberTies as just a single piece of software -- that what you see on screen when you're entering data is all there is -- but that isn't the whole picture. The following diagram illustrates the three major components of the system: the Server, the Databases, and the Application. The typical corresponding folder structure is also shown for reference.



What it all Means

A simple way to understand the relationship between the database, the server, and MemberTies is to think of it like a bank. Think of your database as the bank vault. Your data is like money in that vault. When you want to put money into the vault you have to request the services of an employee at the bank. That employee is the server -- moving money (data) back and forth between you (MemberTies) and the vault (the database).

The Server

It is a common misconception that any reference to a "server" is always a reference to something on the Internet or to a whole other computer somewhere. That can be true at times, but often a server is nothing more than another small program that runs on your computer. With MemberTies, that is also the case; the server is the program that lets MemberTies move data in and out of your database.

The server program files reside in a "Server" folder, located in the folder where MemberTies is installed. The location is typically, c:/program files/MemberTies/server/. Inside that folder are various other folders containing the files required to start and run the server. You shouldn't ever have to touch anything in these folders. In fact, doing so could actually prevent the server from starting at all, thereby preventing access to any database.

The server has several important jobs to do:

- Track all databases
- Listen for and track all connections to the databases
- Manage the flow of data between MemberTies and the appropriate database, and maintain all the tables in the database as they change with the data

As you can see, the server can be very busy. Every time the application wants to view or update information in the database, (for example, when you open a membership record), the server has to receive the request for data, open the appropriate table(s), get the data, and send it back to the application so it can be formatted for display. When you run a query for 1,000 records, the server has seen them all before they ever appear on the screen.

Note that you won't see a special window on-screen when the server is running. The server is a program that runs invisibly in the background, content to simply manage the flow of data between the database and the application. You can tell it is "out there" if you open the Windows Task Manager and look for a process called "mtmysqld.exe". The server program takes up very little memory, and will continue to run even after you shut down MemberTies. This is done so the next time you start MemberTies it will be faster, because it won't have to bother starting the server again. When MemberTies isn't running, the server will be content to just sleep and do nothing. If you need to check the status of the server, or shut it down manually for some reason, you would use the Server Utility, a separate program installed and available for this purpose.

The Database

The database is not a single file. instead, each database is comprised of a large number of files within a single folder bearing the database name. The database folders are located, appropriately enough, in a "database" folder in a special folder in Windows where applications are allowed to make changes, namely, ProgramData. This location is typically, c:/ProgramData/MemberTies/database/(database name)/. There are lots of files inside that folder, representing the various tables within the database.

MemberTies enables you to have any number of databases, each of which will have its own folder under the Database folder. The system keeps track of the "friendly" database name

(the profile name), and other details in a special file called Enter value. This file is updated when you create or modify database profiles, and is primarily used on the Login window to load the database list.

The Server also maintains a couple of small databases of its own. One is called "mysql" and it is used by the server track permissions, connections, and other internal settings. The other is called "performance_schema", and it is used to help the database run efficiently. This means that you will always have at least three databases: your own, and the server's two databases.

Also in the MemberTies folder are sub-folders called Temp and Logs. The Temp folder is used as a place to create and delete files that are only used for a short while as the server goes about its business. These might be temporarily created image files, tracking files, documents in progress prior to saving, etc. The Logs folder contains all of the logs that are generated within MemberTies. These include email logs, backup logs, etc.

Anti-Virus Software

Database files should ONLY be managed by the server. Opening a file using a text editor or word processor can corrupt the file, causing all of the data to be lost. It is impossible to edit data by modifying these files directly. If you run an anti-virus program on the computer that hosts the server, it is a very good idea to make sure it excludes checking on everything in the database folder. The files there are non-executable text files anyway, so they are not virus threats. Most importantly, if your anti-virus software watches and scans every file in "real time" as it opens and closes, that could mean it is constantly scanning every database file as they open and close. That can dramatically hurt system performance.

The Application

The application is what you probably think of as MemberTies itself. It's the collection of windows, menus, buttons, reports, etc., that you use to view and manage all of your data. Essentially, the application is what simplifies the process of working with a complicated database on a day to day basis. Imagine if you had to type out complicated commands for every record you wanted to see, and then more commands to change the data, and still more commands to see the results again. It's much more convenient type data in fields and click a button to save!

When you start MemberTies, the first thing it does is make sure that the server has been started. Then, when you enter user name, password, and database choices on the Login window, the application forwards those selections on to the server. The server verifies that, 1) there really is a user with the name you entered, 2) that the user by that name is allowed to log in to the database you specified, and 3) that the password is correct. If anything isn't right, the server responds with an error, which the application then displays for you to see.

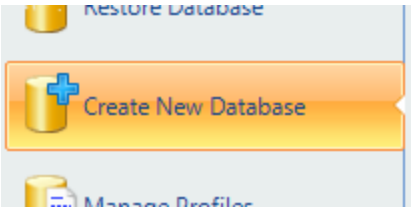
10.3 Creating a New Database

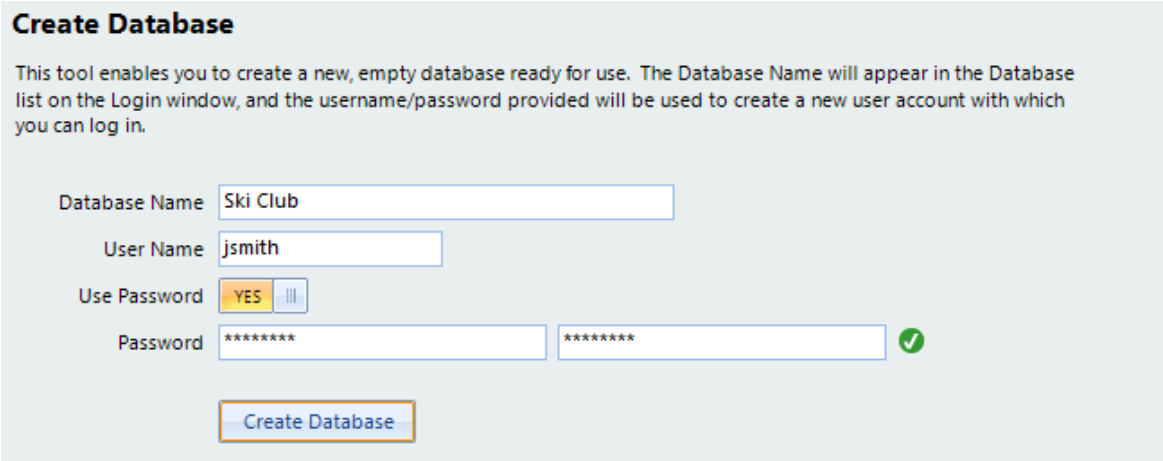
When MemberTies is initially installed there are no databases available, which is why you were prompted to create a new database when you first started the program. If you would like to create another database you can do so at any time.

Note: Only the administrator user (mtadmin) can create new databases.

Creating a New Database

1. Open the Database Toolkit
2. Choose Create New Database.





3. The following fields are available:
   - Database Name - a short meaningful name for your database. For example, "Ski Club" or "My Database" are good names. "Branch of the Widgets Data 2022" is not a good name, because it will always be cut off in the list.
   - User Name - the name with which you will log in. For example, "JSmith", "Susan", or "Secretary" are good names.
   - Use Password - If you do not want to use a password, change this to No, and the password fields will be disabled. Otherwise, enter a case-sensitive password in both password fields.

     Important: Passwords are case-sensitive. "PASSWORD", "PaSswOrRd" and "password" are all completely different!
4. Click Create Database

5. A success message will display when the database has been created.

6. After the database has been created it will be ready for use, and you can start MemberTies and log in as the administrator user or the user you created.

10.4 Backup & Restore

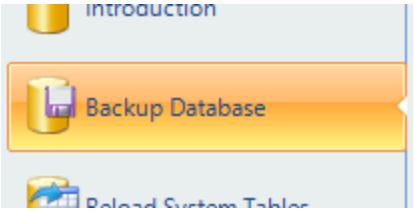
10.4.1 Backing Up the Database

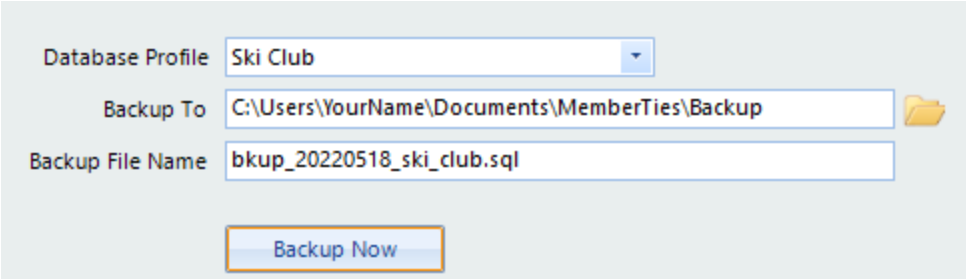
You should keep a backup copy of the database at all times. This copy should either be on a separate network drive, or on a removable media such as a USB drive, CD-ROM, etc. If you choose to keep backups on the same computer as the database itself, be sure to set up your own routine for copying the latest backup file somewhere safe, in case you have a computer crash.

A "backup" folder under your system Documents folder is created by default when MemberTies is installed, and this is the default location the program will use until you change it.

Backing up the Database

1. Open the Database Toolkit
2. Choose Backup Database.





3. The following fields are available:
   - Database Profile - Lists the database profiles found on the computer. Choose the one you want to work with.

- Backup To - The location where the backup file will be saved. Use the browse icon to choose a folder on the computer or network. Normally this field will default to the last known backup location as soon as the Database is selected above.
- Backup File Name - This defaults to "bkup_[today]_[database name].sql" You can change the name if you wish, but do not change the file extension. It needs to be ".sql" in order to be used for a restore.

4. Click Backup Now to start the backup.

Note: The Last Backup date indicates the last time the system knows a backup was performed. This information is stored with the database profile, so if that profile is deleted or the database has been newly restored, the system will not know its backup history.

Automatic Database Backup Reminder

The Backup Prompt database preference can be used to have the system remind you to make backups. The system will check the date of the most recent backup each time you exit the program. This date will be compared with the current date to determine whether to prompt you to run a new backup.

If you choose Yes, the system will open the Database Toolkit so you can make a backup. Note: the system will not run a backup in the "background" without you knowing about it.

10.4.2 Restoring a Backup

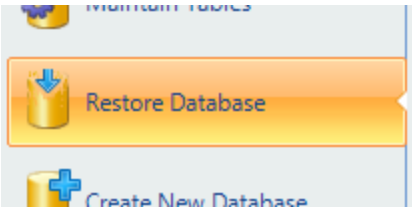
A database backup file can be used to restore the database to the state it was in when the backup was performed.

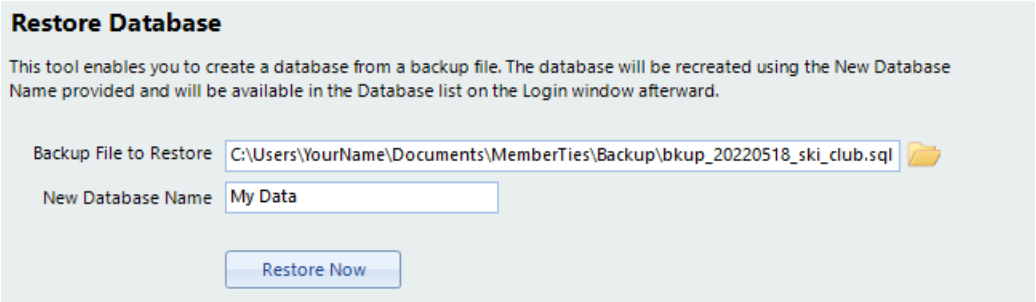
Note:

- You cannot restore the database if you are connected remotely. This is to protect the database from being easily overwritten by a remote user.
- You cannot restore a database "over top" of an existing database; the existing database must be deleted first. This is to prevent accidents.

Restoring a Database Backup

1. Open the Database Toolkit
2. Choose Restore Backup.





3. The following fields are available:

   - Backup File to Restore - Use the browse icon to the right of the field to find and select your backup file. This should be a file named something like, "bkup_20220101_MyDatabase.sql". This is a proper single-file backup if your database, ready to restore

     Note: If instead of a single file, you have a folder full of dozens of files with extensions like "myd" and "frm", you may actually have a copy of the live database. If possible, you should contact the person who provided that data and ask them to create a backup by using the software, because a copy of the live database could contain errors, un-closed tables, etc. In other words, it may not be in a good state to use going forward. If there is no way to get a proper backup file, please contact Support for help.

   - New Database Name - a short meaningful name for your database. For example, "Ski Club" or "My Database" are good names. "Branch of the Widgets Data 2022" is not a good name, because it will always be cut off in the list.

4. Click Restore Now to start the process.

5. When the restore finishes, the database should be available for use. Remember that only user names and passwords that existed in the restored database will be valid when you log in again.

10.5 Housekeeping

10.5.1 Moving a Database

If you have two copies of MemberTies running and you want to copy the database from one installation to another, the process is as follows:

1. Use the Database Toolkit to make a database backup (do not simply make a copy of the install files)

2. Copy the backup file to media that you can move the the second computer (or even email it as an attachment if it's small enough)

3. On the second computer, use the Database Toolkit to restore the backup.

4. Log in normally.

Note that if you have photos and other files tied to various records that are stored on the computer instead of in the database, you will need to copy the appropriate folders to the identical locations on the new computer. Or, prior to making the backup, use the File and Photo Storage preference change the location so they are stored in the database. Then they will backup along with everything else.

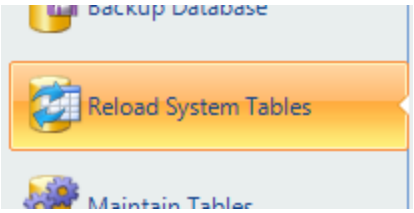
10.5.2 Reloading System Tables

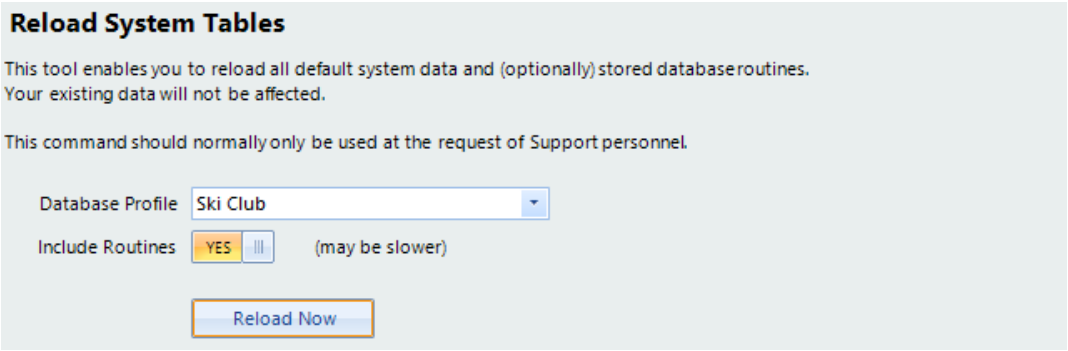
If a system routine somehow gets corrupted, you may see a database error pop up similar to "The system seems to be missing files that should be installed." In this case, running this tool may fix the issue. Normally you would only need to use this tool when directed by Support.

This tool tells the server to go through all system tables and refresh required system data. It will not affect any data that you can change, only "default" data needed by the system. It also reloads all database routines used for system behavior and processing.

Reloading System Tables

1. Open the Database Toolkit
2. Choose Reload System Tables.





3. The following fields are available:
   - Database Profile - Lists the database profiles found on the computer. Choose the one you want to work with.
   - Include Routines - On some computers, reloading all routines (stored procedures, functions) can make the tool take longer; but, you almost always

want to reload them. This should be left as Yes unless there is a good reason to turn it off.

4. Click Reload Now

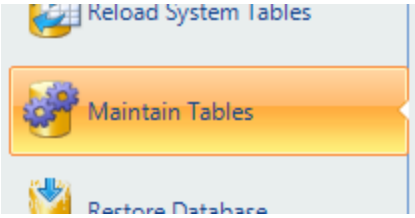
10.5.3 Maintaining Tables

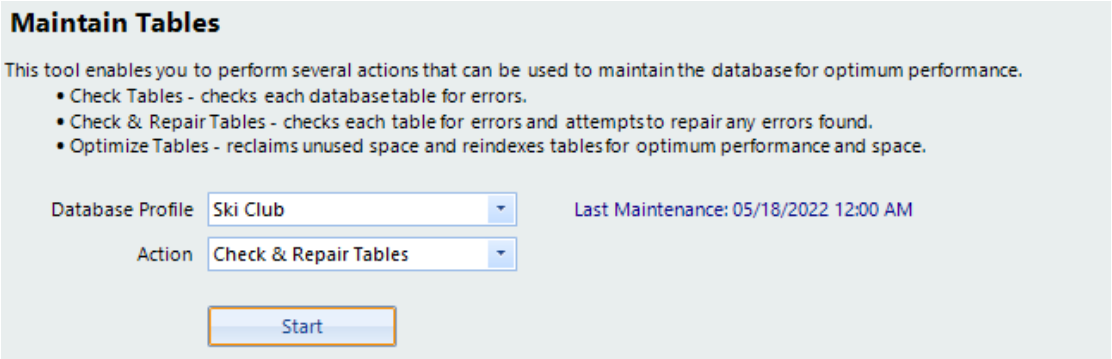
As a database matures and records are added and deleted, they eventually need a little bit of maintenance. When you log in as the administrator user you can run various table maintenance functions to keep your database running smoothly.

Note: A database preference controls how often the system will prompt you to maintain tables. Depending on usage, frequency of deletes, etc., maintenance should be performed every 30-90 days.

Maintaining Tables

1. Open the Database Toolkit
2. Choose Maintain Tables.





3. The following fields are available:

   - Database Profile - Lists the database profiles found on the computer. Note that for this tool, the server database itself is also available for selection (listed as "<Local

Database Server>"). Sometimes a computer crash can leave the server database in a bad state, so this lets you repair it.

- Action -
  - Check Tables - checks each table for errors and indicates any problems in the output generated
  - Check and Repair Tables - same as Check Tables, but also automatically attempts the repair of any table indicating a problem
  - Optimize Tables - this should be used monthly, or if you have deleted a large number of records. Ordinarily, running an optimization once a month will keep tables compacted and well optimized. The most common use of the Optimize function is to reclaim allocated but unused space in a table (such as when a large block of records has been deleted.) This is a little like optimizing a computer's hard disk.
  - Run Support Script - see Running a Support Script for details.

4. Click Start to start the selected action.
5. When the processes finishes, a list of output messages will be displayed. A given table may be shown more than once; the first entry may show an error, followed by another entry showing "OK", meaning the problem was corrected. The last row shown for any table should always have a Message Text entry of "OK" or "Table is already up to date." If you see any other message, run the "Check & Repair Tables" action.

Maintenance Frequency

It is a good idea to get in the habit of running the table maintenance operations on a monthly to quarterly basis, depending upon how much activity you have on your database (i.e., a database with 10 concurrent users and a half-million records will require more frequent maintenance for optimal performance) than a single-user database with 500 records. Think of table maintenance as basic housekeeping for a healthy database. Like changing the oil in your automobile, it keeps the database engine running well.

At a minimum, run Check Tables and look at the results. If any errors or warnings are reported, run the Check & Repair Tables option and then run Check Tables again. When finished, run Optimize Tables to refresh indexes and compact and organize your data.

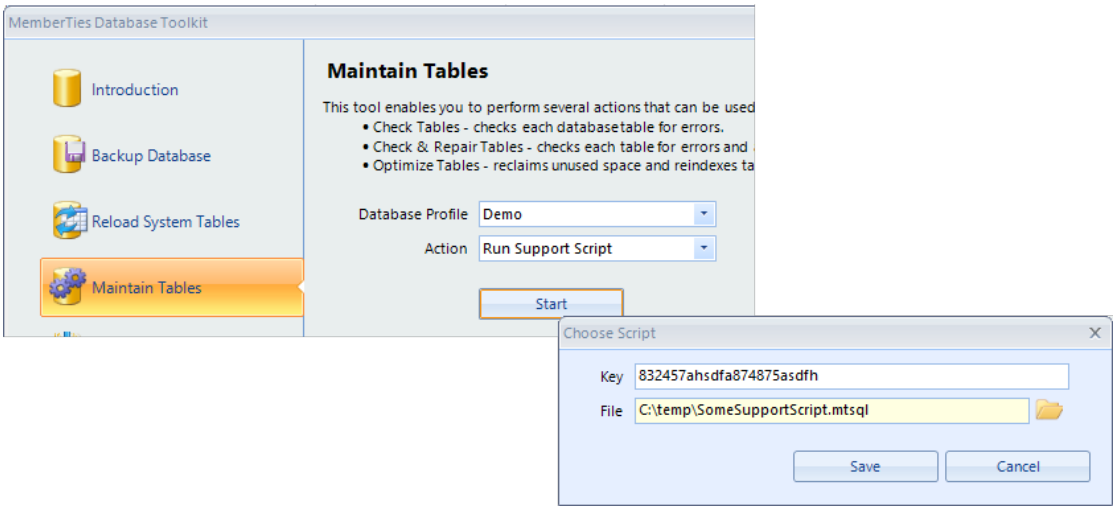
10.5.4 Running a Support Script

When a minor database change is needed, the support team can send you a special script that can be run against your database. This is an option under the Maintain Tables tool.

Running a Support Script

1. Open the Database Toolkit

2. Choose Maintain Tables.
3. Choose your database profile and set the action to Run Support Script
4. Click Start.



5. On the Choose Script window, the following fields are available:
   - Key - Enter the key provided by the support team. This key is required to unlock and run the file you select.
   - File - Click the Browse icon next to the field to find the file you were sent.
6. Click Save to run the script.
7. When the processes finishes, a result message of some kind will be displayed, the contents of the message will vary based on the script.

10.5.5 Resetting a Database

If you just need to clear test member data and start with a clean list, you can select all members on the Membership List and then press CTRL+DEL to delete them.

If you really want to reset the entire database and start over you'll need to delete the existing database and create a new one.

Deleting all Members

1. Choose the Members ribbon.

2. Click any record in the Membership List to select it.
3. Press CTRL+A to select all records.
4. Click Delete or press CTRL+DEL to delete all records.

Deleting and Recreating the Database

1. Follow the instructions to delete a database.
2. Follow the instructions to create a new database.
3. After the database has been created it will be ready for use, and you can log in as the administrator user or the user you created. Remember, any old users and passwords will be gone.

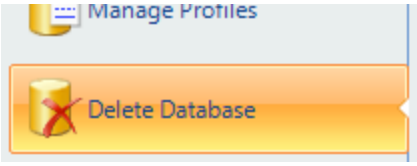
   The database should only contain the original sample record.

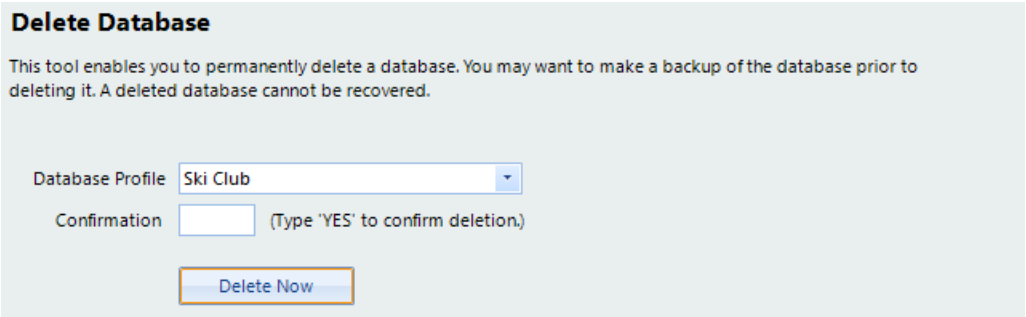
10.5.6 Deleting a Database

If you want to permanently remove a database from your computer, you can do so, but there is no way to undo this action.

Note: If it is a remote database (i.e., a database you connect to on another computer or hosted by Myrro International, you can only delete the profile. Contact support (for a hosted database) or your system administrator to have the database physically deleted.)

1. Open the Database Toolkit
2. Choose Delete Database from the list on the left.





3. The following fields are available

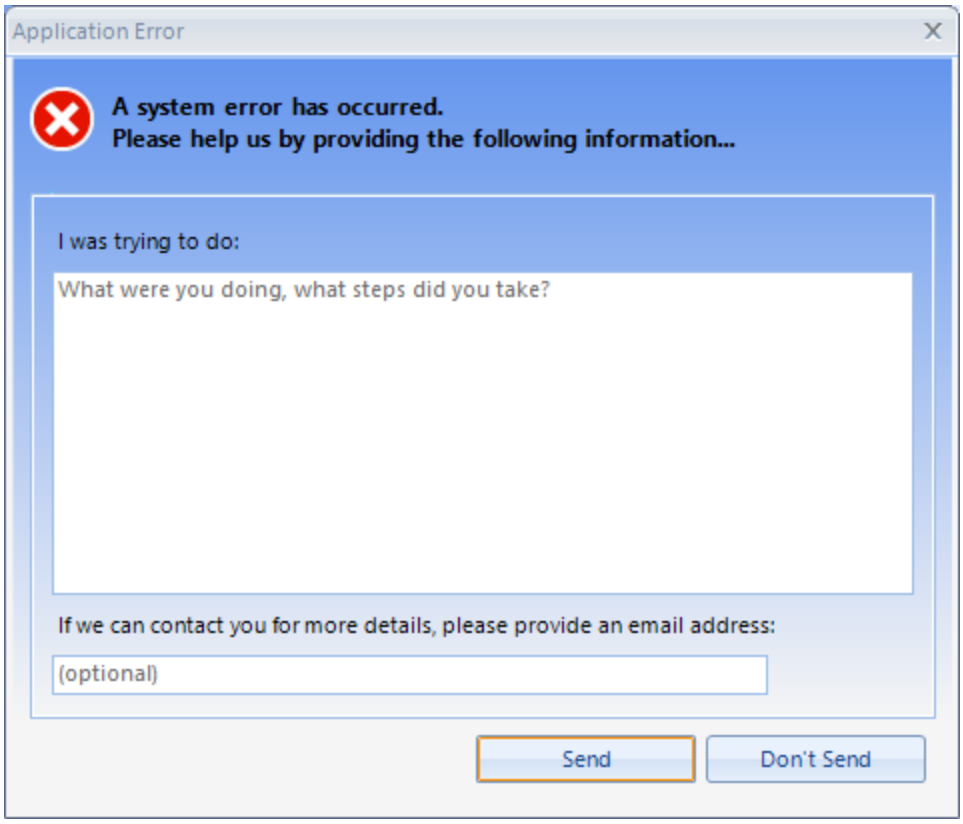
- Database Profile - Lists the database profiles found on the computer. Choose the one you want to work with.
- Confirmation - Type "YES" to confirm that you really want to do this.

4. Click Delete Now to destroy the database and remove it from your computer.

10.5.7 Application Error

If something goes wrong while the program is trying to communicate with the database, you could see the Application Error window. (Hopefully you'll never see it!)

This window lets you know that a serious error has occurred, and most importantly, provides a quick way for you to send the error information to the support team so it can be researched and fixed.



The following fields are available:

- I was trying to do - Any additional details you can provide about what you were trying to do can be helpful. It's really helpful if you're doing something that can be done from multiple places, like posting dues, to tell us how you got to the place the error occurred.

- Your Email - enter your email address if possible. We may know of a fix, or we may have additional questions, but we will reply. This is optional. You can send the error report to us without including your email.
- Send - generates and sends error details to support. The information sent includes the error text, and any system log entries for the current day to help us diagnose the problem. It also includes information about your current connect, your computer monitor resolution, and your computer's Windows version, and processing power.
- Don't Send - closes the window without notifying support.

Note: If you are not connected to the internet, the a normal error message will display.

10.6 Remote Databases

10.6.1 Setting Up a Multi-User System

MemberTies can be set up to run on a any TCP/IP network, enabling multiple users to connect to the database at the same time, up to the number of users allowed by your license. In this scenario, the server will be running on one host computer, and users will connect to the database on that computer, rather than to a local database on their own computer. The key is that each computer needs to have TCP/IP enabled (see your network administrator if you aren't sure), and the server computer needs to have port 3310 enabled (if using a firewall, for example), because the server will "listen" on that port by default.

Note: The computer hosting the server can also be used as a normal workstation. It does not have to be dedicated solely as a "server."

Note: It is best to set up the server to run as a Windows service when running multiple users. This ensures the database server is always started on the server machine. See Running the Server as a Windows Service for instructions.

The first thing to do is decide which computer will function as the the server. We'll refer to this computer as the "Server Host" throughout this procedure. The Server Host is where the database will actually reside. You will need to know the IP Address of this computer. If you don't know the address, try the following:

Finding the Server IP Address

1. Click the Start Button and choose Run.
2. Type "cmd" and press Enter.
3. When the command prompt window appears, type "IPCONFIG" and press ENTER. You should see output similar to the following:

```
Microsoft Windows [Version 10.0.22000.675]
(c) Microsoft Corporation. All rights reserved.

C:\Windows\system32>ipconfig

Windows IP Configuration


Ethernet adapter Ethernet:

   Connection-specific DNS Suffix  . : lan
   IPv6 Address. . . . . . . . . . . : fdf3:10e7:2815:0:8c91:f34d:3208:3db5
   Temporary IPv6 Address. . . . . . : fdf3:10e7:2815:0:6543:c824:b8cc:db9a
   Link-local IPv6 Address . . . . . : fe80::8c91:f34d:3208:3db5%17
   IPv4 Address. . . . . . . . . . . : 192.168.1.18
   Subnet Mask . . . . . . . . . . . : 255.255.255.0
   Default Gateway . . . . . . . . . : 192.168.1.2
```

4. Look for an entry called IPv4 Address. In this example, the Server Host's address is: 192.168.1.18

5. Take note of this address, you will need it later.

Set Up the Server Host Computer

The server host is the only computer on which you need to create a database, because other users will be connect TO this computer and using the database. If, in the future, you want to create a local database on one of the other computers you can still do that, but it doesn't apply to this procedure.

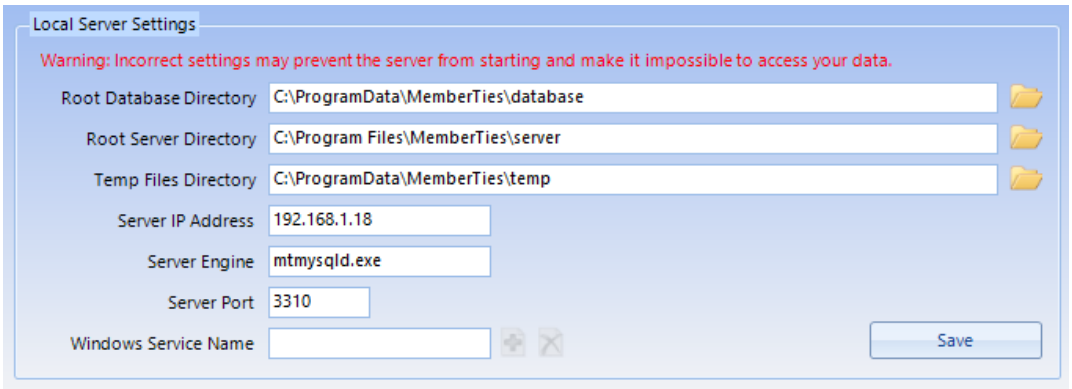
1. Install MemberTies.

2. Start MemberTies and follow the appropriate New User Login steps to connect to or create a database.

3. Exit MemberTies

4. Start the Server Utility (choose Start > Programs > MemberTies > Server Utility)

5. In the Local Server Settings area, change Server IP Address from "localhost" to the IP address found earlier.



Note: If this computer is OUTSIDE your local network (possibly connecting via the Internet), you will need to use the IP address that is exposed to the outside world (because from outside your network, the IP address of the server host is not visible or accessible). For most home users with broadband internet access, this address will be the IP address of the broadband modem or router. If you don't know the "outside" IP address, it will probably be displayed in your firewall or router software. In addition, if you have a router you will probably need to tell it to pass port 3310 requests on to the IP address of the Server Host computer. Refer to your router/firewall documentation if you do not know how to do this.

6. Take note of the Server Port (3310). If you are using a firewall, be sure this port is open for TCP traffic within your network. Refer to your firewall documentation if you don't know how to do this.

   Note: If you are not running a firewall of some kind, you really should be. You should never expose your database to the Internet. In fact, you shouldn't be using the Internet at all without a firewall, because you're exposing **all** of your personal information to thousands of internet worms, scans, and other sorts of attacks. Even if you think nothing on your computer is of any value, consider that you're also offering your computer up to be taken over by an attacker and used as a slave machine to attack other computers on the Internet. Consider that here at Myrro International, *every time* we connect a new computer to the internet, it is hit by port scans and attacks within *minutes* and it never stops. **Use a firewall.**

7. Click Save.

8. Stop and restart the server by using the Stop Server and Start Server buttons on this window. The server is now listening for connections on the specified port and requests to that IP address should be passed through to the server engine.

9. If necessary, start MemberTies as the administrator and add users.

Set Up Other Users' Computers

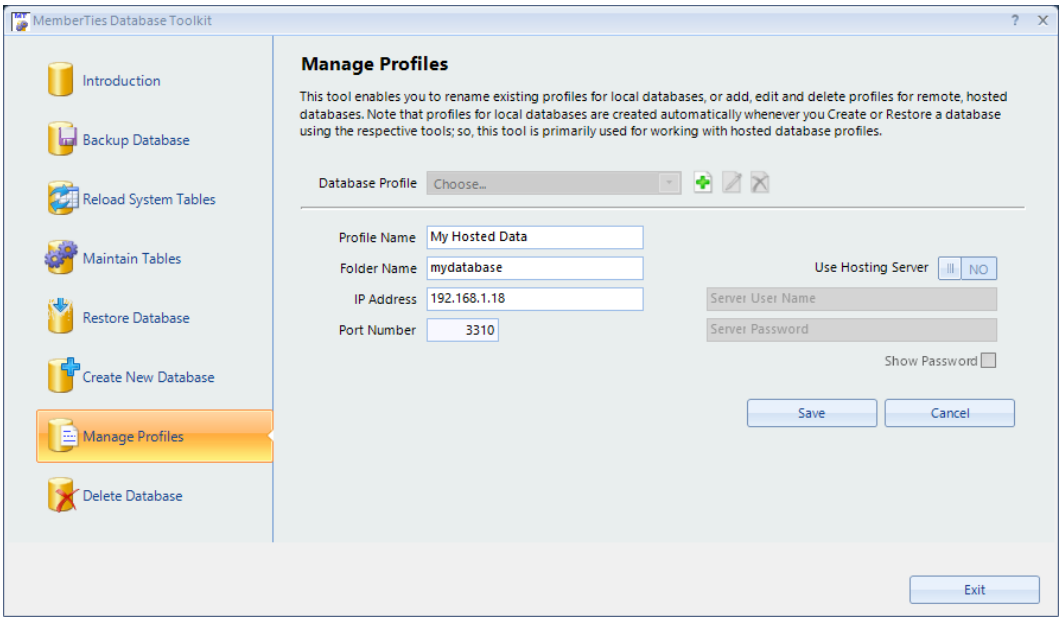
1. Install MemberTies normally.

2. Start MemberTies

- If the Welcome appears, refer to the New User Login help and follow steps to connect to a Remote database.

- If the Login window appears (because a database already exists on that machine) you will need to use the Database Toolkit on that computer to create a new remote profile. See Managing Database Profiles for details. You will use the database folder name, IP Address, and Port number from the host computer when creating the profile.

  The new profile should be similar to this:



  Note: the "Use Hosting Server" option is not used when you host the system yourself. This setting is only used when your database is hosted at Myrro International and in that case, the information for this window is provided for your organization.

3. Once the profile is created, start MemberTies and try to log in.if you cannot, verify the following:

   - Be sure the server has been started on the Server Host. You may need to contact your database administrator to verify this.

   - Be sure the database profile is pointing to the correct database folder name on the server host (remember, this is not a complete path, just a folder name)

   - See if you can "ping" the server host computer's IP address. Choose Start > Run, type CMD, and press Enter. At the command prompt type the IP address of the host computer (for example): "ping 192.168.1.18" If the ping doesn't work, you have network problems that need to be solved.

```
C:\Windows\system32>ping 192.168.1.18

Pinging 192.168.1.18 with 32 bytes of data:
Reply from 192.168.1.18: bytes=32 time<1ms TTL=128
Reply from 192.168.1.18: bytes=32 time<1ms TTL=128
Reply from 192.168.1.18: bytes=32 time<1ms TTL=128
Reply from 192.168.1.18: bytes=32 time<1ms TTL=128

Ping statistics for 192.168.1.18:
    Packets: Sent = 4, Received = 4, Lost = 0 (0% loss),
Approximate round trip times in milli-seconds:
    Minimum = 0ms, Maximum = 0ms, Average = 0ms
```

Ping showing success

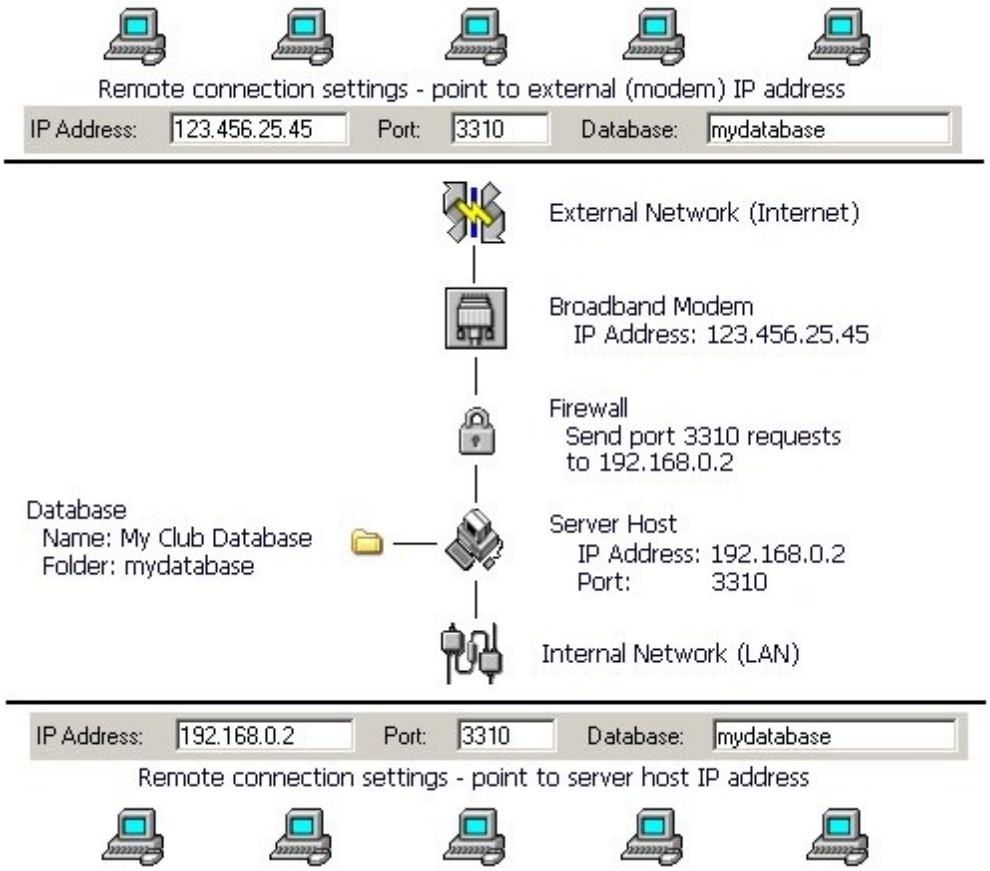
- Examine the diagram below to see if you've incorrectly configured anything.
- See Common Problems below for other ideas.

Note: If the Server Host is open to the Internet, the database can be accessed from anywhere in the world. You need to be careful if you do this, and be sure that any users you create have secure passwords. (There are programs on the internet that will scan for an open port 3306 and look for a database. This is the reason MemberTies defaults to port 3310 instead.)

Example of Internal (local) and External (remote) Connections

This graphic example depicts 10 connections, 5 coming from outside the local network (the computers at the top) and 5 coming from inside the local network (the computers at the bottom).

- External Network Connections - shown at the top of the illustration, have to pass through the firewall to get to the server host computer. Therefore, they use a profile that points to the IP address of the modem, because that is the "doorway" into the internal network where the server host resides. The firewall protecting the internal network has also been configured to keep port 3310 open, and direct requests inward to the server host computer's IP address. (Note that the host computer may have it's own firewall, such as the Windows Defender that is installed with Windows, or a firewall that is part of an anti-virus package. You may need to enable port 3310 on that firewall as well.)
- Internal Network Connections - shown at the bottom of the illustration, can see the server host computer directly. Therefore they have profiles defined that point to the server host IP address instead of the modem address.



Increasing Security

There are some things you should do to increase the security of your database:

- Limit user accounts - be sure that you only have the user accounts that you actually need. If someone leaves your organization, remove or at least deactivate their account so that nobody can log in using their credentials.
- Change the mtadmin password. The default password for this account is just "password", and since it's documented in the Help, anyone can know what it is. Be sure to change it to something more secure.
- Secure the computer where the database physically resides. Don't use it for children's games, internet surfing, or other things that can introduce viruses or worms that could be seeking out database information. Also remember that anyone with physical access to a computer can eventually bypass any security.
- Consider hosting the database with Myrro International and connecting to it remotely. That way a major computer crash or theft on your end won't take your database with it.

Common Problems

The following problems are most commonly encountered when setting up a remote connection:

- The computer running the server has received a new IP address, so now the remote computers can't see it because they have database profiles set up and pointed to the old IP address. To fix this, either:

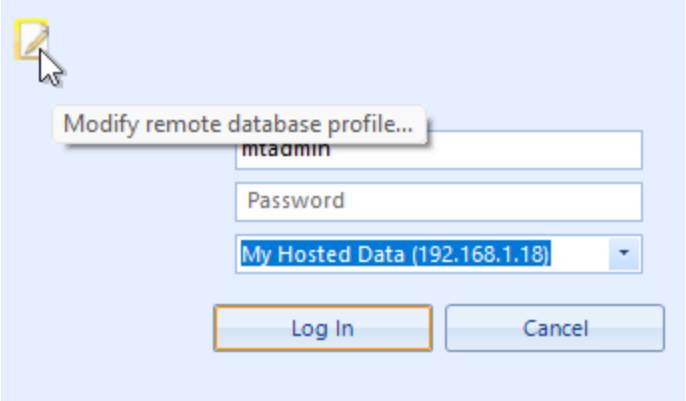
  o Update the remote profiles on the remote computers (see example below to update the profile from the login window), or

  o Change the IP address on the server computer back to what it was before, or

  o Define a static (unchanging) IP address for the server computer using your router's software, so the address won't change just because the router restarts.

- A full path was entered instead of just the database folder name for the profile. This is by far the most common issue! The database folder entry should be something like, "mydatabase", NOT c:/long/path/to/some/folder/mydatabase/

  Note that you when using a remote connection, a special edit icon appears on the Login window as shown below. This allows you to modify a profile quickly to correct a typo or other error.



- The host computer has the Server IP Address set to "localhost" on its Server Utility instead of the actual public IP of the server machine. Correct the IP address on the server computer.

- The port (default is 3310) is not open. Consult your firewall documentation to determine how to open the port.

- Windows is blocking the server engine program (mtmysqld.exe). Consult your firewall documentation to determine how to allow the program.

- The database server *computer* is running, but the server *software* has not been started. The server software can be started either by logging into MemberTies once (you can exit afterward), or by using the Start Server button on the Server Utility. You can also set the server to run as a Windows service so it starts automatically when Windows starts.

- The database folder has been "shared" using Windows File Sharing. The database server **does not work this way**, and using a shared database from multiple workstations will almost certainly cause database corruption. There should only be one database server running, and it should be accessed via an IP address and port number.

10.6.2 Maintaining Database Profiles

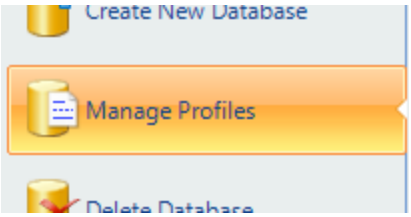
Database profiles tell MemberTies where to find a particular database, what to call it (the name that appears in the Database dropdown on the Login window), and how to connect to it.

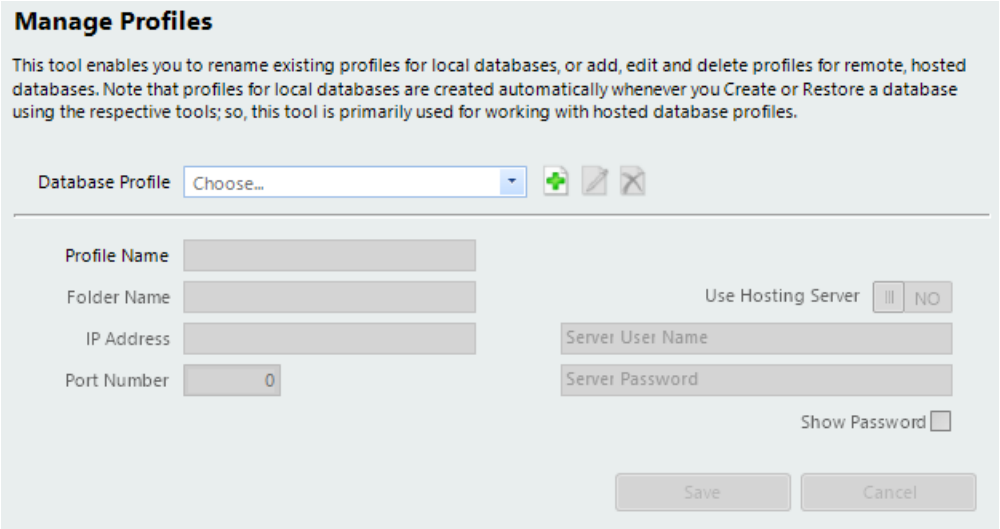
Profiles are normally created automatically when you create or restore a database on your computer. This tool is primarily used for managing *remote* database profiles, i.e., profiles that tell MemberTies how to connect to a database on another computer. That being said, it is possible to use this tool to make minor changes to local database profiles, i.e., to change the profile name.

To create a new remote profile, you will need to know the details about the way your database is hosted, the IP address of the host machine, etc. If you are hosting the database yourself, you may want to read Setting up a Multi-User System before you begin. If you are connecting to a database hosted by Myrro International, you will have received special instructions containing everything you need.

Managing Database Profiles

1. Open the Database Toolkit
2. Choose Manage Profiles.

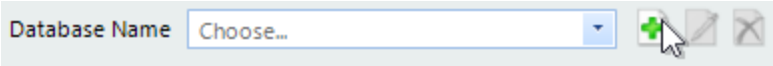




3. This page enables you to add, edit, and delete profiles.

Adding a Profile

1. Click Add (next to the Database Name list)



2. The following fields are available:

   - Profile Name - a short meaningful name for your database. For example, "Ski Club" or "My Database" are good names. "Branch of the Widgets Data 2022" is not a good name, because it will always be cut off in the list.

   - Folder Name - The name of the folder specific to your database on the server. This is **not a full path** and it is not necessarily the same as the display name shown in the Database list on the Login window. If you start the Database Toolkit on the Server Host computer and use this same tool, you will see the actual folder name displayed.

   - IP Address - The address on which the remote server is listening for connections

   - Port Number - The port through which database server communicates

   - Use Hosting Server - Indicates whether you are connecting to a hosting server at Myrro International. Activating this will enable the server user name and password fields so you can provide the connection information you received. If you are simply connecting to a database on another computer within your own organization, leave this off.

     Note: While this tool is not intended for creating a database profile for a local

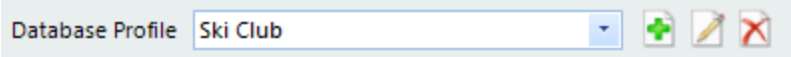
database, if you specify "localhost" as the IP Address, the system will know it is on this computer. A local profile (for a database on your own computer) does not use hosting server user name/password settings because the connection is handled internally. Do **not** use hosting fields if you are running a local database server or you will not be able to connect. A common mistake is to enter your MemberTies user name and password in these fields, but those will not work because they are for logging in to your *database*, not your *server*.

- Server User Name - The user name MemberTies should use to connect to the hosting server. This is not a MemberTies login user name and is normally provided to you specifically for a hosted database.
- Server Password - The password MemberTies should use to connect to the hosting server. This is not a MemberTies login password and is normally provided to you specifically for a hosted database.
- Show Password - Causes the password to display in plain text.

3. Click Save to save the new profile. The next time you start MemberTies, the profile should appear in the Database list on the Login window.

Modifying an Existing Profile

1. Choose the desired profile from the Database Profile field, then click Edit.



2. Modify fields as needed.

   Note: If you are editing a local profile, only the profile name can be changed. Everything else is handled internally by the server.

3. Click Save.

Deleting an Existing Profile

1. Choose the desired profile from the Profile Name field, then click Delete.
2. Confirm the deletion when prompted.

10.6.3 Using Database Hosting

If you would like your database to be available to multiple users in multiple locations, but do not want to expose your home computer to the Internet for it to function as a database server, you may want to consider our database hosting service.

Myrro International offers monthly database hosting on dedicated database servers. These servers are used solely for our customers' databases. They are not used by any other company or individual.

Here are some things to consider:

- The database servers are dedicated for our use. There are no children loading games or unknown programs on the server. Nobody receives an email with a potentially dangerous attachment on these computers.
- The servers are really servers (as opposed to a home computer that typically has fast download speeds, but slow upload speeds, and lots of other processes running and demanding attention from the CPU).
- The servers are in a secure data center, accessible only to authorized personnel. Keycard protocols, biometric scanning protocols and round-the-clock interior and exterior surveillance monitor access to the data center.
- The data center partners with multiple network providers to provide redundancy and 100% up-time. If something does happen and access to your database is temporarily interrupted, we will extend your hosting period accordingly to make up for it. In the 20+ years we've hosted databases, this has never happened exactly once, and that was a billing error by the data center, not an equipment failure.
- Every fiber carrier enters the data center at a separate point to protect against complete service failures caused by an unlikely network cut.
- Should a total utility power outage ever occur, the data center's power systems are designed to run uninterrupted, with every server receiving conditioned UPS (Uninterruptable Power Supply) power.
- The UPS power subsystem is N+1 redundant, with instantaneous fail-over if the primary UPS fails.
- If an extended utility power outage occurs, the routinely tested, on-site diesel generators can run indefinitely.
- The data center's HVAC (Heating Ventilation Air Conditioning) system is N+1 redundant. This ensures that a duplicate system immediately comes online should there be an HVAC system failure.

Database Security

Each customer is issued a complex user name and password that is required to connect to the database server. That combination enables you to access only your specific database. No other customer will even know what other databases exist, because their user name/password combination will be blind to all but their own.

The server user name and password values are stored once on your database connection profile, so you don't have to enter them again. Once connected you will be able to create users and passwords inside MemberTies normally, using any security groups and rules you wish.

Database Backup

For an additional fee, we will add your database to a daily/weekly/monthly backup process to give you additional peace of mind. We still strongly recommend doing an additional backup to your own computer for added redundancy, but having an additional automatic backup can save you if you forget to make your own backup occasionally.

Database Restore

To restore a database, you must contact support. For security reasons, we cannot allow anyone to load or restore a database onto the server. You can either send use the desired backup file, or we can restore the backup stored on our servers. Allow 24 hours for a database restore.

Maintenance

Backups (if requested for your database) run at approximately 1:00 am CST (Central Standard Time, GMT -600). When backups run, your database tables may lock momentarily while the database is processed (if you're subscribing to our backup service). If we need to do other server maintenance that requires a restart of the server, we will send out an email ahead of time.

Contact support with any questions about database hosting, or visit our website at https://www.myrro.com/memberties to order.

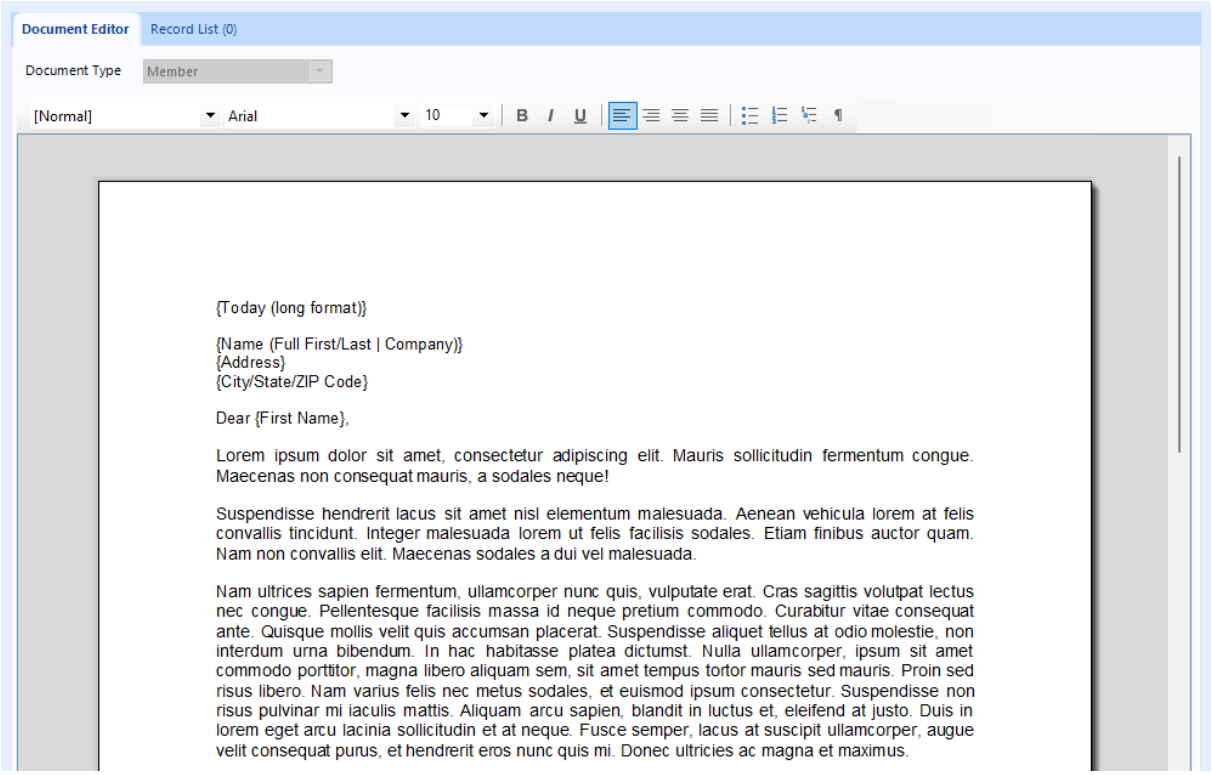
Part XI

Documents

11 Documents

11.1 Documents Overview

With MemberTies Professional you have the ability to create formatted documents similar to what you could create in dedicated word-processing software. Documents can be created for member or group data (which just controls the Fields available for embedding in the document).



The following features are supported:

- Paragraph Formatting
- Paragraph Styles
- Font/Character Formatting
- Font/Character Styles
- Multi-column layouts
- Bullets & Numbering
- Tables
- Text Frames
- Images
- Page Headers/Footers
- Section Formatting
- Embedded database fields

The word processing software is actually a 3rd party tool has been built into MemberTies Professional. As such, we cannot make it do things it doesn't already do. However, it is a very powerful tool that provides significant of flexibility and features.

11.2 Documents Ribbon Bar

The ribbon enables you to access document functionality that isn't part of the actual word processor (which has its own toolbar).

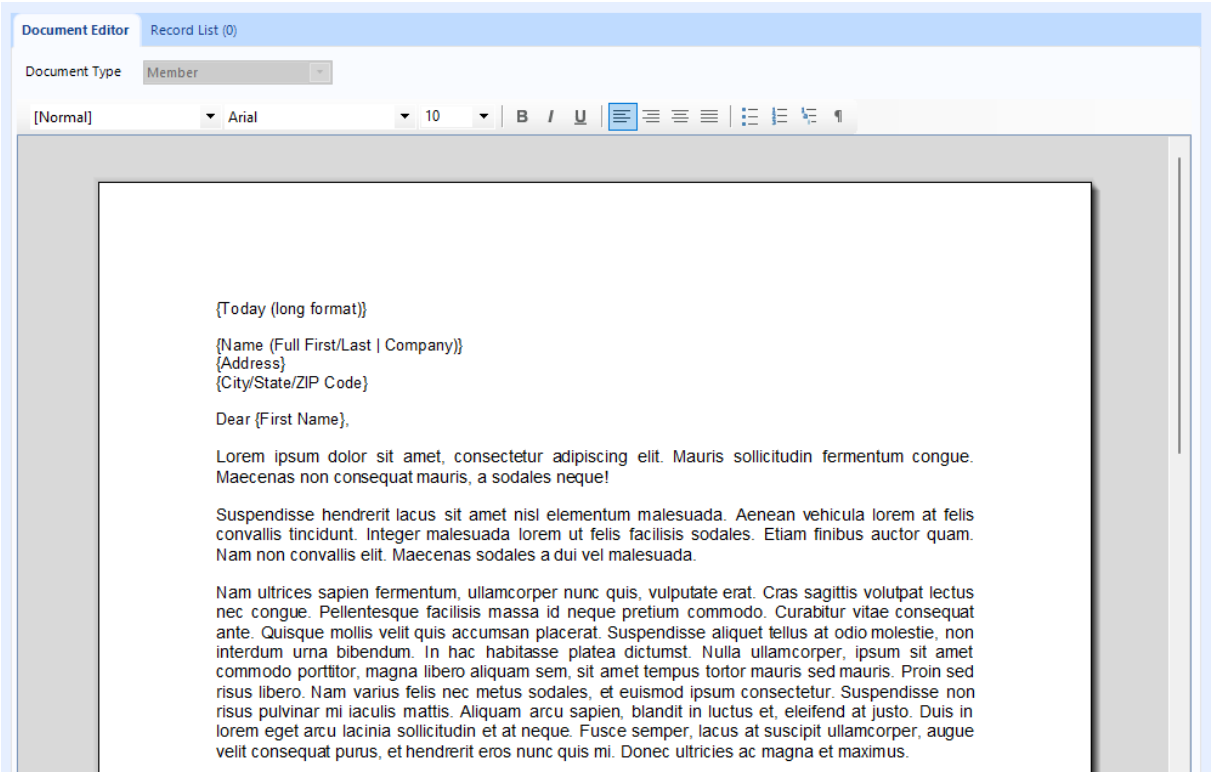
The Documents Ribbon

The general use of each button is described below. Click any option to go to the help for that area.

- Open - open an existing saved document
- Load - create a new document by importing file. Many formats are supported, though the imported document may include formatting that is not compatible with the document tool. Reformatting may be necessary.
- Add - add a new document
- Delete - delete the active document
- Save - save the active document
- Save As - save the active document under a new name
- Fields - toggles the display of available fields to embed in the document. When a field is inserted, the system will use the appropriate data for the associated member or group's record in place of that field.
- Page Setup - opens the document's Page Setup dialog to adjust margins, paper size, etc.
- Setup - opens the printer setup window for the current printer
- Print - prints the active document

11.3 Using Database Fields

Inserting database field placeholders into a document means that the appropriate data for the member or group will be substituted for the field placeholder. In other words, you could select the First Name field from the field list as a salutation, and create something like:

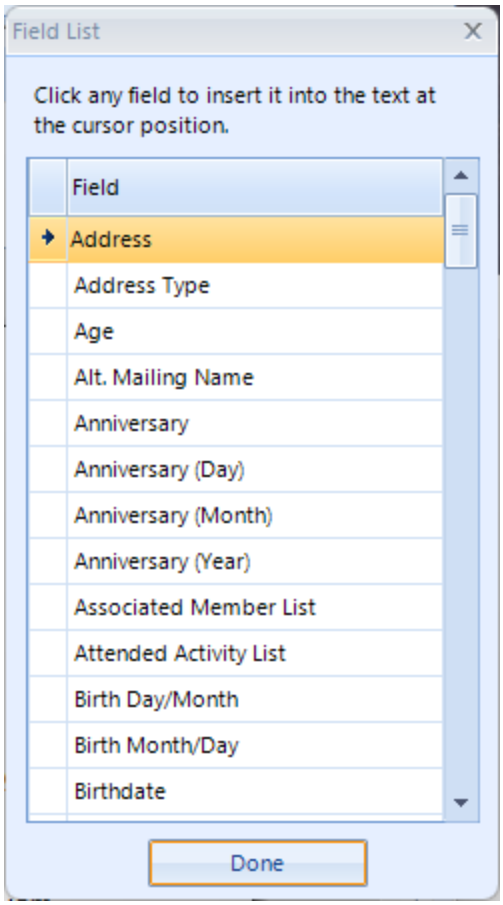


In this example, the system will substitute multiple placeholders to create the address and salutation for the member, and use the organization name in the signature.

Adding Fields to a Document

1. With the document displayed, click the Fields button in the Design section of the Documents ribbon.

2. The Field List window can be dragged outside the borders of the document window to keep it available.



3. Place the cursor in your document where you want to insert the field, then click the field in the Field List. The placeholder for that field will appear in the text. i.e., clicking "Address" in the example above will insert {Address} in the text. (Fields have a gray highlight when selected, which indicates they are "active.")

   Note: If necessary for readability, you can *carefully* modify the text of the placeholder. Click the placeholder text and change the text between the brackets. When you're finished, click the placeholder and make sure it auto-highlights. If it does not, then the system no longer knows it is a field placeholder and it will need to be redone.

   Note: Custom fields will only appear in the Field List if they have been defined as available to be used in Reports & Views.

   Note: If the only thing on a line is a field, and that field value is blank when the data is merged, that entire line will be removed. If you want to use a field that might be empty, and have the line remain even when the field is empty, there must be at least one other character of text on the line. This is controlled by the Remove Blank Lines preference.

4. If you are finished with the Fields window you can dismiss it by clicking Done. This will not affect any fields that have been used in the document.

Note: If a Field placeholder is the only text on a line, followed by a blank line (such as the Date in the example above), it may be necessary to at least add a single space after the placeholder to ensure the following blank line is displayed correctly.

11.4 Working with Documents

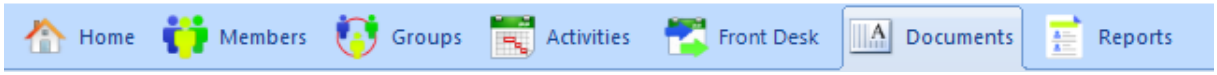
The Documents window enables you to create a "live" document and embed database fields into it similar to a mail-merge.

You work with a "live" document on-screen all the time. If you open a previously saved document, you can make changes to it immediately, and then save or print it as you wish. If you embed fields in the document, you can query for the records to be used when printing, and the system will generate the document for every member or group, replacing placeholder fields in the document with the relevant data from the record.

A document can be created from scratch, or by loading a file such as a Word document into the document window.

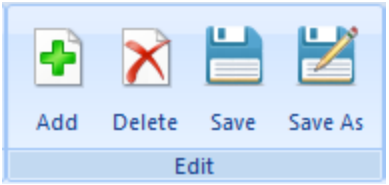
Working with Documents

Choose the Documents tab from the ribbon bar.

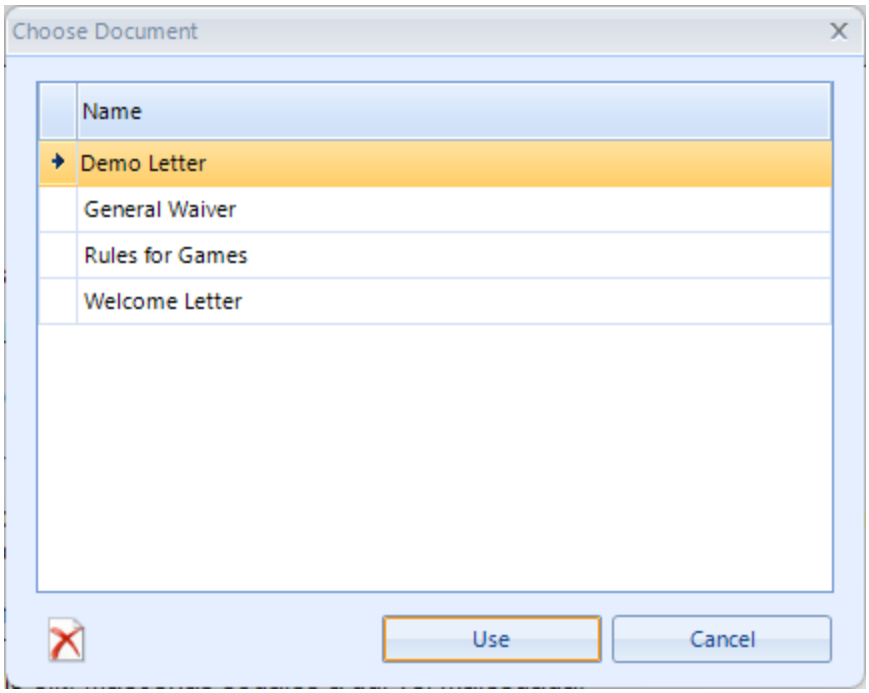


Add or Open a Document

1. To add a new document, click Add In the Edit section of the ribbon



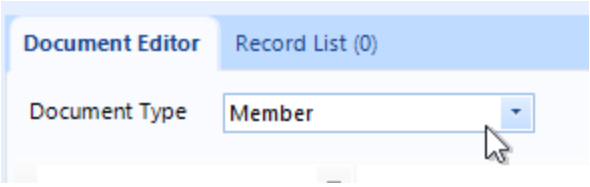
To open a previously saved document, click Open in the Document section of the ribbon, the choose from the list of saved documents.



To load an external file as a new document, choose Load and select the file.

Note: if you loaded an external file, you may need to reapply formatting to fix any display issues caused by incompatible formats.

2. The new or existing document will be displayed.
3. If you created a new document, set the Document Type. This will control the fields available for insertion in the document. This field cannot be changed once the document has been saved.



4. Create or modify the document. Refer to the following for additional details:
   - Embedded Fields
   - Paragraph Formatting
   - Character (Font) Formatting
   - Bullets & Numbering

- Styles
- Page Settings
- Tables
- Images
- Text Frames
- Printing

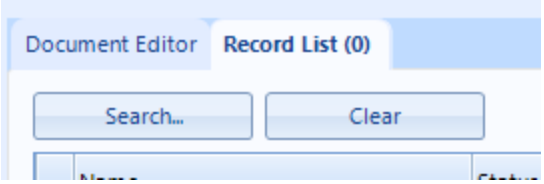
5. When finished (or before printing), click Save (or Save As to save the document under a different name).

11.5 Building a Record List

When a document includes one or more Fields, each field is a placeholder that will be replaced with data from a member or group record (based on document type) when printing. As such, a document must have a set of records to use in order to know what data to use.

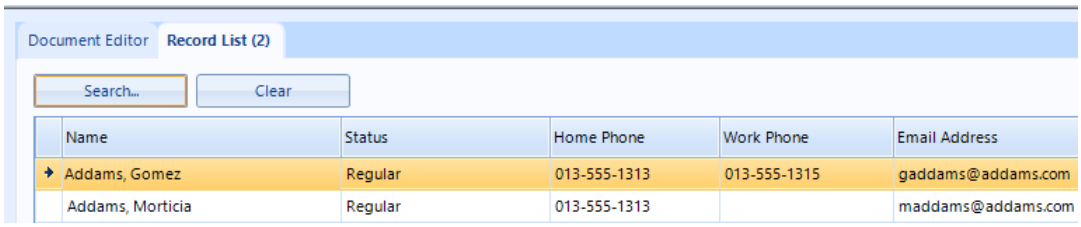
Building a Record List

1. With the document displayed, choose the Record List tab.



Note: The text of the tab indicates how many records are currently listed.

2. Two buttons at the top of the list enable you to search for or clear the contents of the list. Click Search.
3. The basic search window for the document type (i.e., Members or Groups) will open. Use the search to find the records that should be merged with the document. See Search Overview if you haven't used the search window before.
4. After searching, the records will be displayed in the record list.



Note: The columns displayed in the record list have nothing to do with the fields used on the document. The list just shows some general information so you can see that the correct records are there. When the document prints, the system will pull data from the database as needed.

5. Once the list has been retrieved, you can print the document.

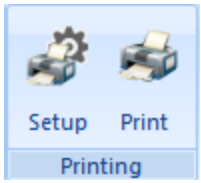
11.6 Printing

The process of printing a document changes depending on whether Fields are used:

- If you create a simple document without any Fields, the document is ready to use as-is and can print immediately
- If you create a merge document with one or more Fields, the system requires at least one record in the Record List in order to do the merge. In addition, records will process and open in a preview window before printing (until you choose Print All) so you can verify the output.

Printing a Document

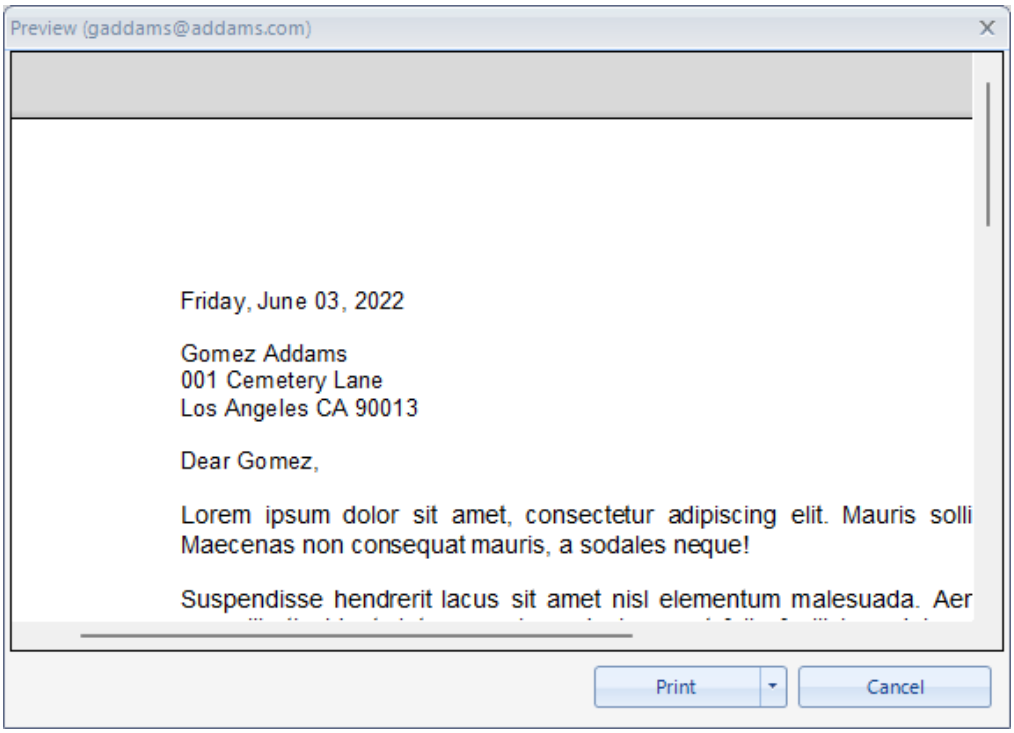
1. If the document includes one or more Fields, you must have at least one record listed in the Record List. See Building a Record List for details.
2. In the Printing section of the ribbon, click Print.



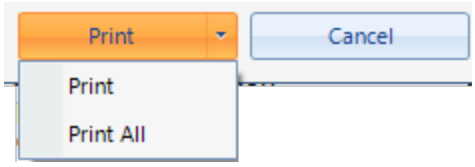
Note: You can click Setup to open the print setup dialog if you want to change any printer settings without actually printing.

3. The appropriate Print dialog for your computer/printer will appear. Verify your selected printer and settings.
4. Click OK to start printing.
   - If your document does not contain any Fields, it will print immediately.

- If your document uses one or more Fields, the first record will be processed and the merged document will display in the Preview window.



5. If the Preview window appears as above, there are three options:



- Choose Print to print the current document, and then generate and preview the next one.
- Choose Print All to print the current document, then generate and continue to print the rest without previewing.
- Choose Cancel to stop printing.

11.7 Formatting and Layout

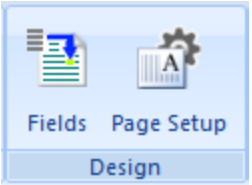
11.7.1 Page Settings

The Page Setup dialog enables you to set margins, paper size, orientation, header & footers, and other page-level details about the document.

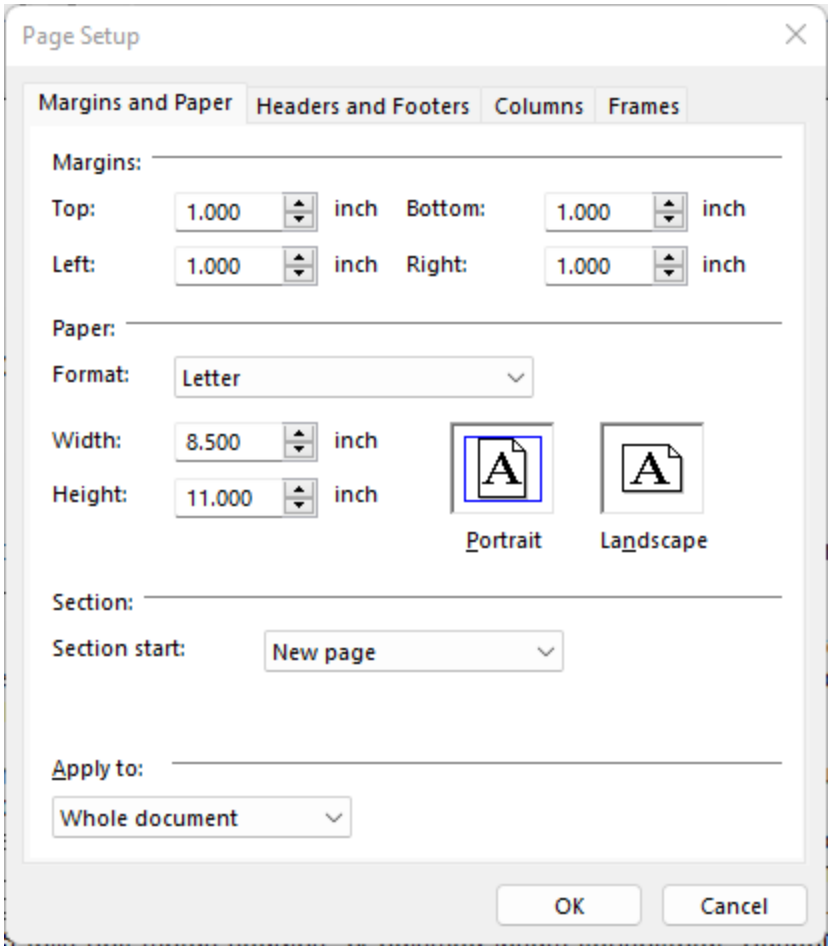
Note: The Page Setup dialog is generated internally by the word processing tool, so we have no control over it.

Modifying Page Settings

1. With the document displayed, click the Page Setup button in the Design section of the Documents ribbon.



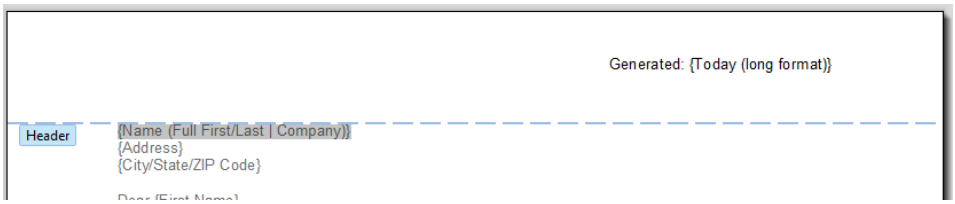
2. The Page Setup dialog will display.



4 The window contains several tab pages of settings:

- Margins and Paper - enables you to set document margins, choose the paper format (size) or set a custom size, and set the orientation.
- Headers and Footers - enables you to turn on or off the header and/or footer for the current page or the entire document. You can also specify how far the header/footer starts from the top/bottom of the page, and set a special value just for the first page if necessary.

  Note: If headers or footers are turned on, you can access them by double-clicking in the header/footer area (it can take a couple of tries for the header outline to appear). Then double-click in the body of the document to return.



- Columns - enables you to change the document into a multi-column layout. Several column count options are provided, or you can specify a custom number of columns, in which case you can also set custom widths and spacing for each column. You can also choose to have a vertical line displayed between the columns, using a specific width and color.

- Frames - enables you to work with text frames

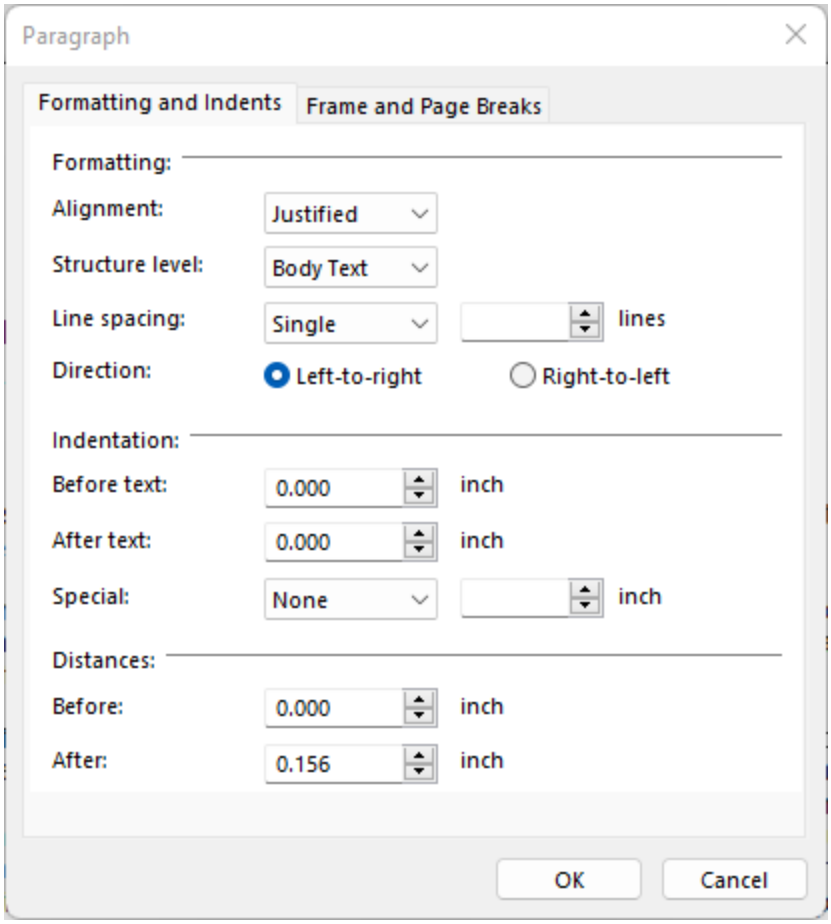
5 Make your changes, then click OK to apply the changes

11.7.2 Paragraph Formatting

Paragraph settings provide substantial control over the look of paragraphs, from line spacing to special borders and indents.

Modifying Paragraph Settings

1. With the Document displayed, right-click the paragraph you want to modify, then choose Paragraph.



2. Make your changes and click OK to save.

   - Formatting and Indents - enables you to control alignment, line spacing, indents, and automatic distance before and after the paragraph. (Using the before and after distance for a paragraph eliminates the need to use a blank line between paragraphs and makes for a much more professional document.)

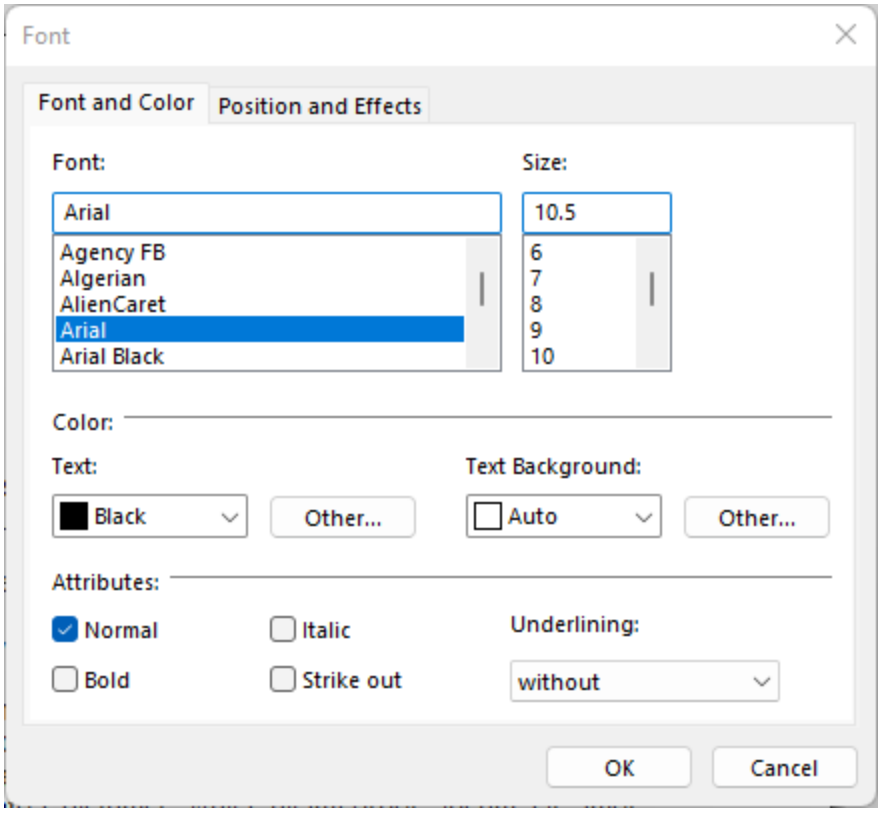
   - Frame and Page Breaks - enables you to surround a paragraph with a border one one or more sides, and control pagination effects (you can force a page break before the paragraph, prevent the paragraph from breaking across pages, etc.). The Widow/Orphan control option lets you specify the minimum number of lines that can be left on a page.

11.7.3 Character (Font) Formatting

Character settings enable changes to the selected font, as well as more advanced settings like sub/superscript, casing, and scaling.

Modifying Font Settings

1. With the Document displayed, right-click the text you want to modify, then choose Character.



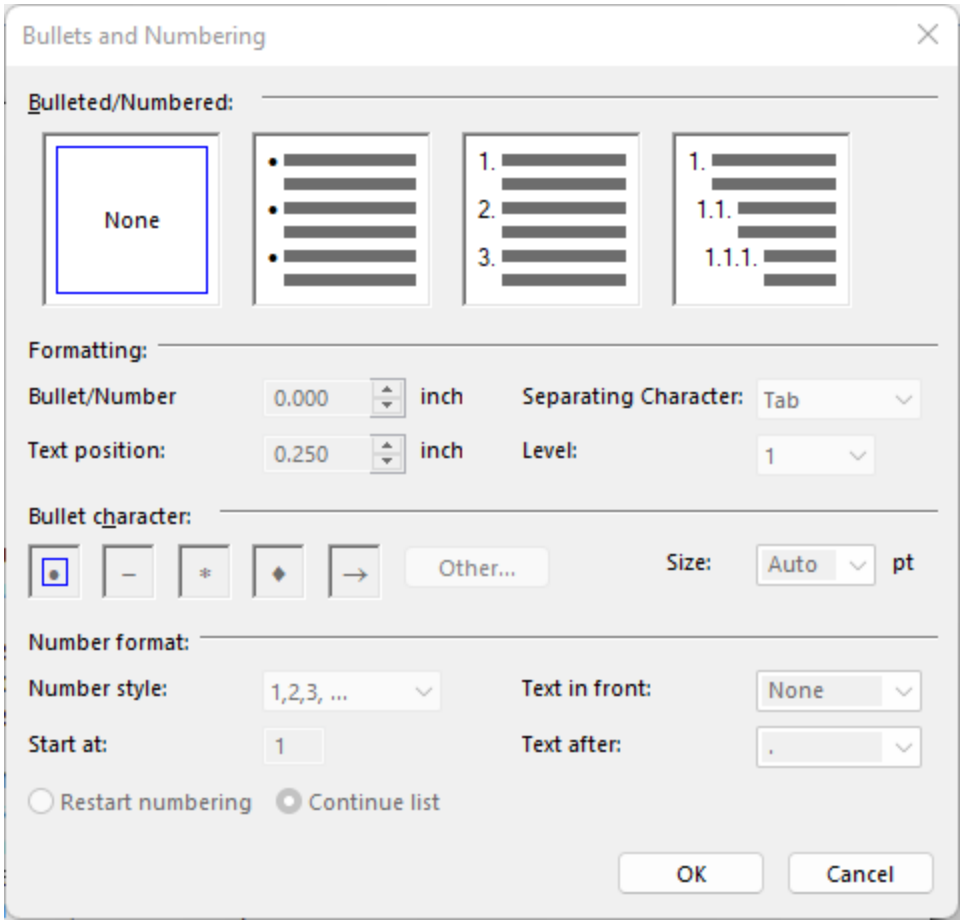
2. Make your changes and click OK to save.
   - Font and Color - controls the "look" of the text
   - Position and Effects - controls other special display settings like superscript and casing

11.7.4 Bullets & Numbering

Several options are available for creating bulleted or numbered lists of one or more levels.

Modifying Bullet and Numbering Settings

1. With the Document displayed, right-click the text you want to modify, then choose Bullets and Numbering.



2. Make your changes and click OK to save:
   - Bulleted/Numbered - controls the style of list (None, Bullets, Numbers, or Multi-Level

- Formatting - controls where the actual "bullet" displays relative to the margin and text, where the text begins after the "bullet", the character separating the bullet and the text, and the indent level.
- Bullet Character - controls the look of the bullet
- Number Format - controls the numbering style, text, the number that begins the sequence, and any text to follow the number (i.e., a period)

11.7.5 Using Images

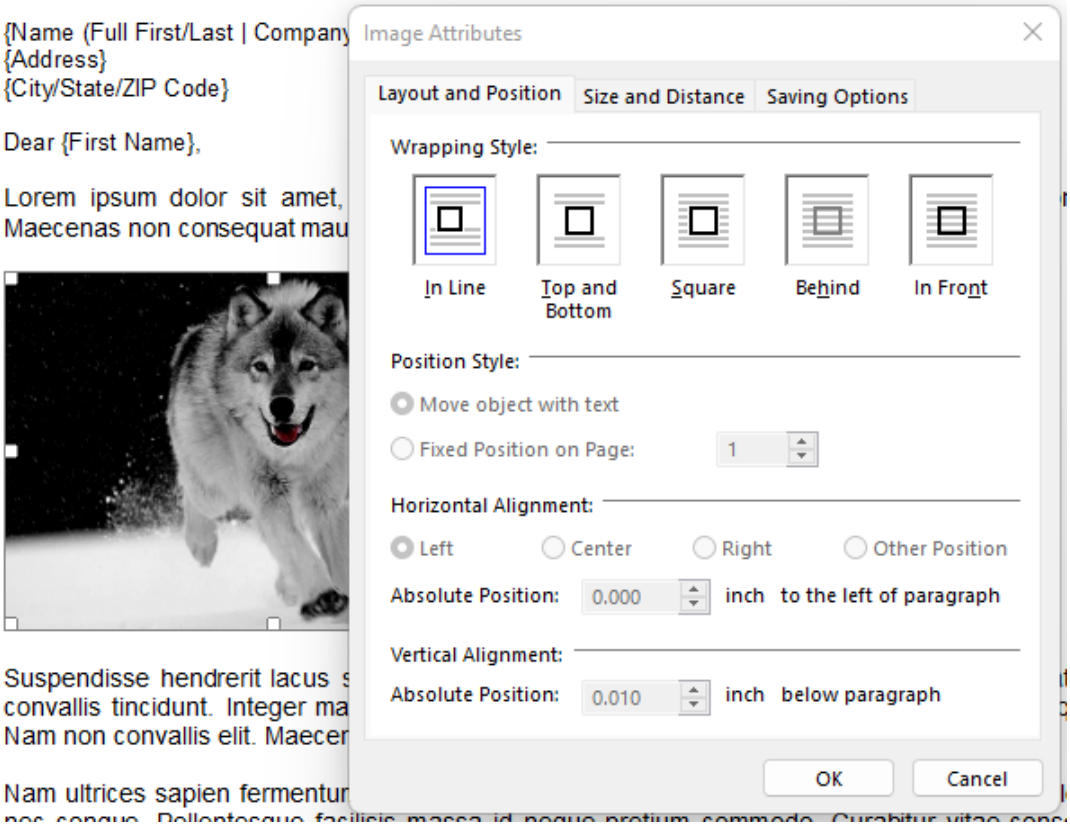
An image can be inserted into a document from a file, and stored either as part of the document (meaning the original image file is no longer needed), or as a link to the file (meaning the file must always exist in order to display in the document).

Once added to the document, various properties can be modified to change how it is displayed or saved. For example, the image can be resized, set to flow with the text, etc.

Using Images

1. With the Document displayed, place the cursor in the text where the image should be inserted, right-click and then choose Insert > Image.
2. The file Open dialog will display. Navigate to the location where your image is saved, select it, and click Open. The full-size image will appear in the document.

   Note: The Open dialog often starts with a file type of "Windows Bitmap (.bmp)" selected by default. You can change the file type, or you can type an asterisk (*) in the File Name field and press enter to force the dialog to show all files.
3. To adjust the display of the image, right-click the image and choose Format. The Image Attributes dialog will open.



4. The attributes are divided into three pages of settings:

   - Layout and Position - controls the way text flows around the image, its position, and alignment.

   - Size and Distance - controls the actual size and scale of the image, how much of a gap exists between the image and the surrounding text, and whether it is moveable or resizable.

   - Saving Options - controls whether the image data is stored as part of the document (independent of the original file) or kept as a separate referenced file.

5. Make your changes and click OK to save.

11.7.6 Using Tables

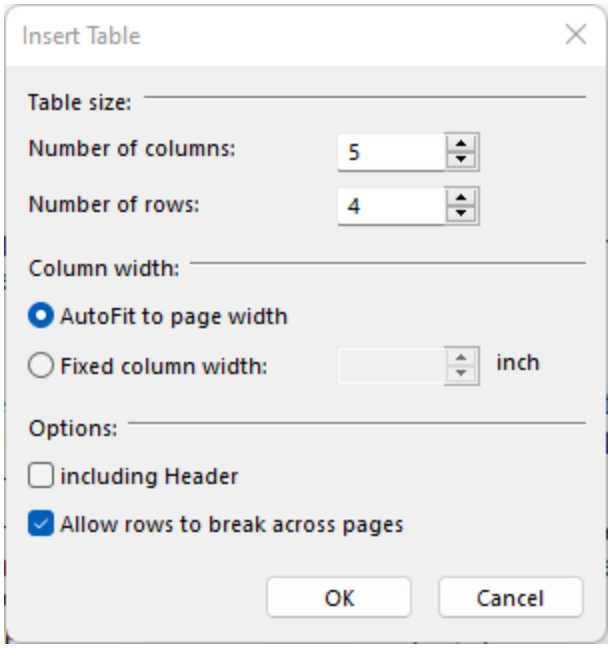
Tables can be inserted virtually anywhere in a document, and can even be inserted within other tables. By default, the grid lines that identify the borders of the table (for editing purposes) are displayed, but they can be turned off with the Grid Lines menu option.

Note: A table cannot be inserted when text is selected (i.e., it can't be used to replace selected text). In addition, if a table is inserted immediately above or below an existing table, it will become part of the existing table. There must be at least one line of normal text between tables.

Using Tables

1. With the Document displayed, place the cursor in the text where the table should be inserted, right-click and then choose Insert > Table.

2. On the Insert Table window, specify the number of columns and rows the table should have.



3. Click OK to insert the table.

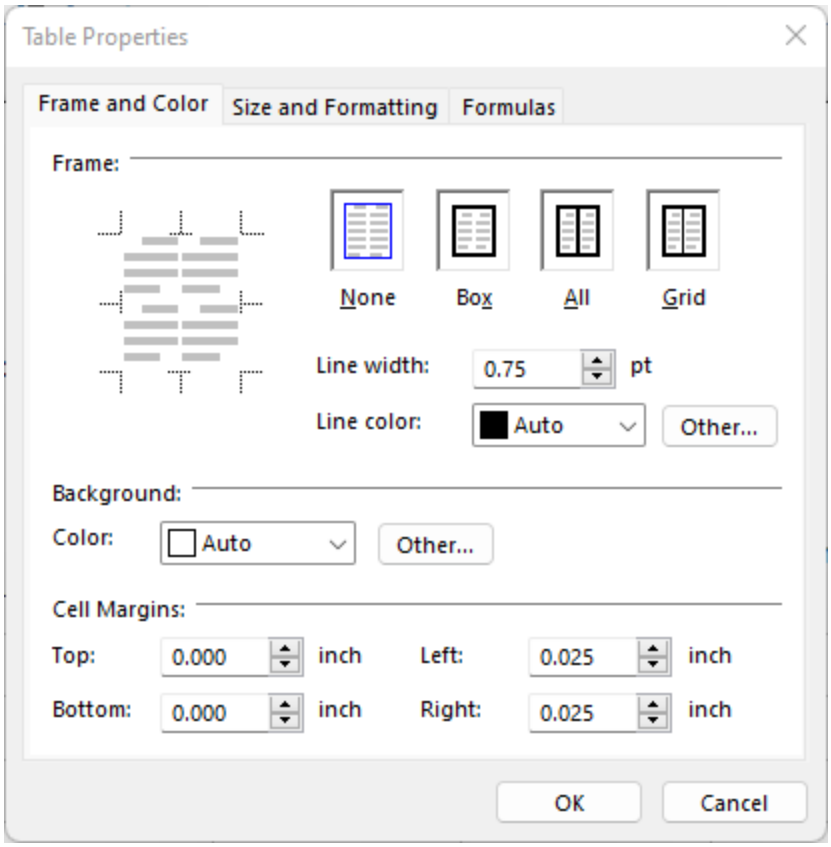
Deleting a Table

1. Right-click anywhere in the table and choose Delete > Table.

Modifying Table Attributes

Any set of cells can be modified at once, as long as the entire set of selected cells are within a single table. i.e., if the table contains another table within it, you cannot select part of both tables and modify them at once.

1. Select the cell(s) to be modified, then right-click and choose Format Table.



2. The Table Properties window includes several pages of settings:

   - Frame and Color - enables you to change the border around the selected cell(s), background color, and the amount of space between the edge of the cell and the text within.
   - Size and Formatting - enables you to set cell height, alignment, and whether the row can break across pages.
   - Formulas - enables you to define a formula in a cell

3. Make your changes, then click OK to save.

11.7.7 Using Text Frames

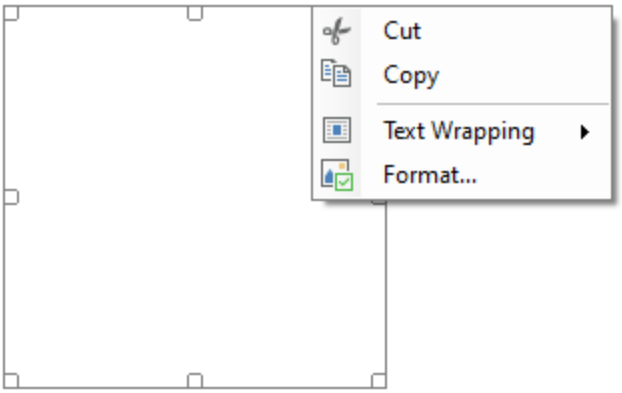
An text frame can be inserted anywhere in a document, and can be set up so that surrounding text flows around it. Text Frames are often used for precise position of images, blocks of text, etc.

Once added to the document, various properties can be modified to change how it is displayed and how text flows around it.

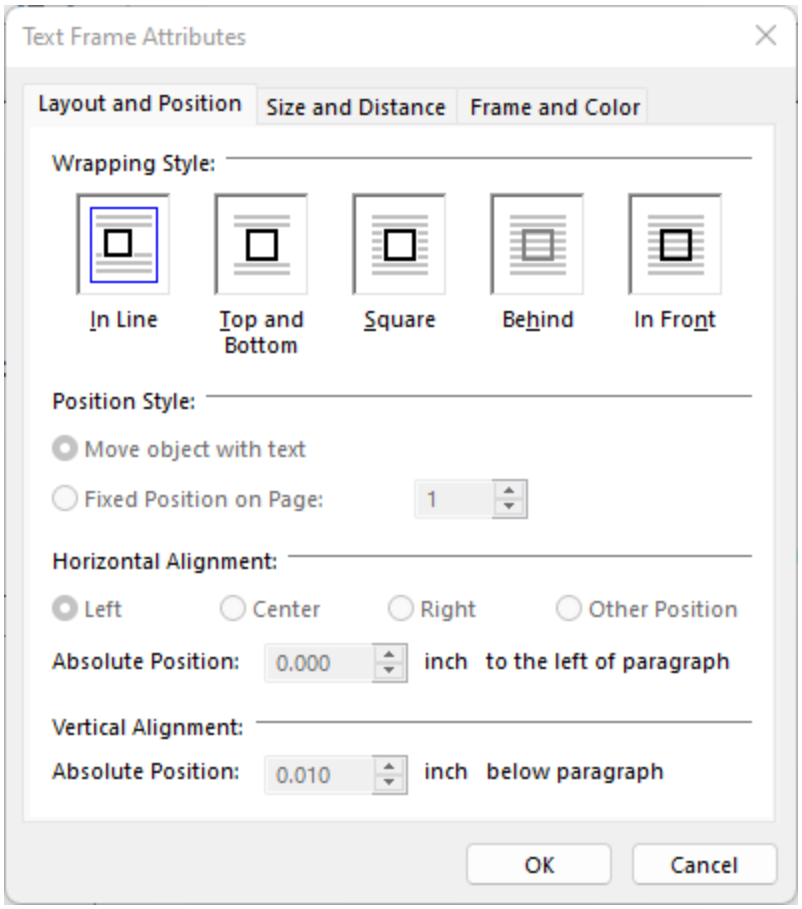
Using Text Frames

1. With the Document displayed, place the cursor in the text where the text frame should be inserted, right-click and then choose Insert > Text Frame.

2. The frame will appear immediately. To open the formatting options, first click the border of the frame to select it, then right-click and choose Format



3. The Text Frame Attributes window will open.



4. The attributes window includes several pages of settings:

   - Layout and Position - controls the way text flows around the frame, its position, and alignment.
   - Size and Distance - controls the actual size and scale of the frame, how much of a gap exists between the frame border and the surrounding text, and whether it is moveable or resizable with the mouse.
   - Frame and Color - controls the background color of the frame, the width of the border, and the internal margin (between the text in the frame and the frame itself)

5. Make your changes, then click OK to save.

11.7.8 Using Styles

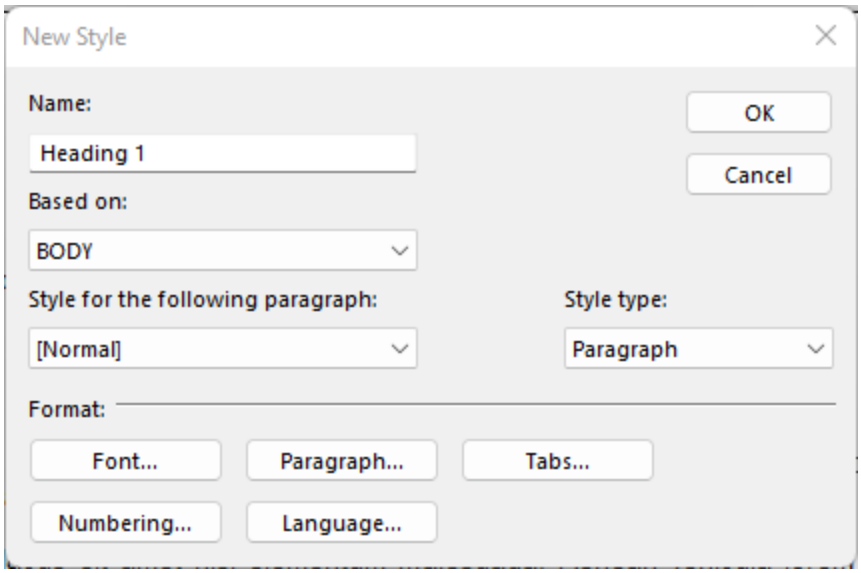
Styles allow you to create a consistent look within your document by assigning a name to a specific set of format settings. i.e., "14pt bold Arial" might be settings for the "Heading 1" style.

Once your styles are ready, you can quickly assign them to text in your document, and that text will be changed to match the style.

Styles can include formatting for the font, paragraph, tabs, and numbering.

Using Styles

1. With the Document displayed, right-click anywhere in the document and choose Styles.
2. The Styles dialog will open, showing the currently defined styles. If you only need to apply an existing style, select it and click OK. Otherwise, you can choose to add a New style, or select a style in the list and choose Modify or Delete.
3. Click New.

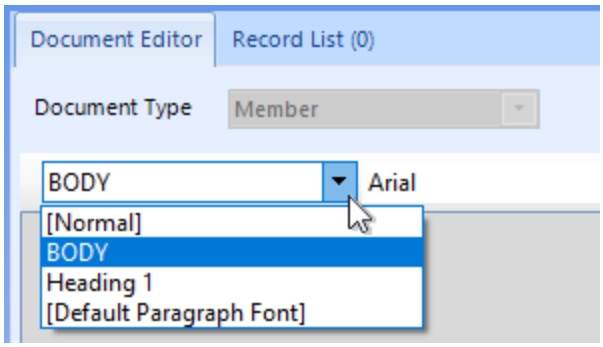


4. On the New Style window, provide a name for the style.

   Note: In this example we are creating a Heading 1 style, and we want the following paragraph to revert to "BODY". i.e., after we type our heading and press return, the system will automatically use BODY as the style for the next paragraph, rather than create another Heading 1 paragraph.

5. Click any of the buttons in the Format section to modify additional settings for the style.
6. Click OK to save the style.

7. The new style will be listed for easy selection in the Style list on the document editor.



Part XII

Email

12 Email

12.1 Sending Email

With MemberTies Professional you can send email to virtually any collection of members. You can send to all members you select on the Membership List, or all members of a group, attendees of an activity, etc. Email is sent using your own email account, so you must have an internet connection and a valid email account somewhere. When the email window opens, it will automatically populate its address list with email addresses based on where you were when you opened the window, as described below.

When email is sent, there are various ways to address the message(s). By default, the system generates an email for each recipient, so their email address shows up in the To: field of the email, rather than buried spam-like in a blind-copy list. If you wish, you can still choose to put email addresses in the "To", "CC", or "BCC" fields of the message, but it is less professional and can expose recipients' email addresses to each other.

Warning: SPAM email (also known as unsolicited commercial email) is a growing problem on the Internet today. If we determine that you are using MemberTies Professional to send SPAM, we will terminate your license and report you to the appropriate authorities. Using MemberTies Professional to send unsolicited email (SPAM), or to transmit illegal content is expressly forbidden.

Note: You must have an internet connection and your own email account in order to send email. MemberTies is not a standalone mail server.

Sending Email

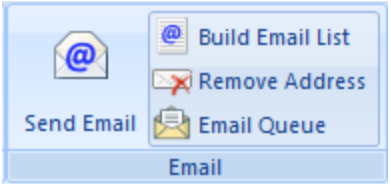
1. Choose the Members, Groups, or Activities tab from the ribbon bar.

2. In the list that opens, select the records to whom you want to address email. You can use the standard Windows selection methods.

   Note: If you choose Group, you will be prompted for whether you intend to email all members of the group, or the group contact itself.

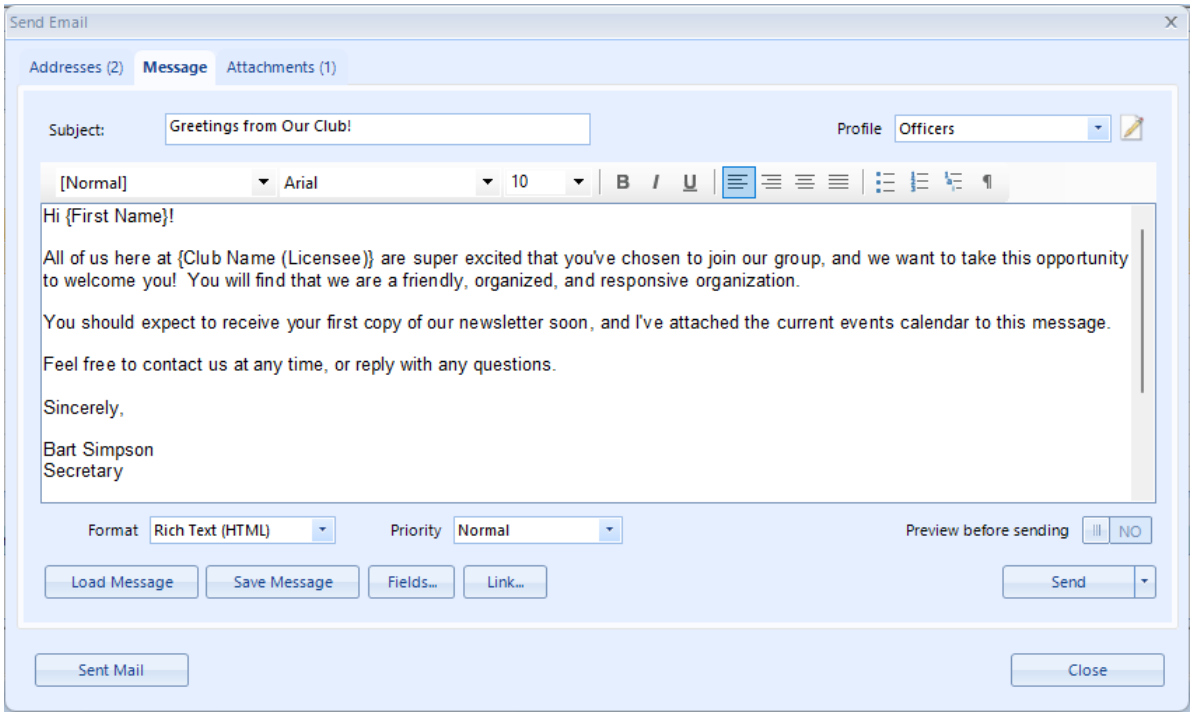
   Note: There are various places in the system where an email address is displayed as a data-entry field. When an Email icon appears next to a field, you can click the icon to open the Send Email window with the current address displayed.

3. In the Email section of the ribbon, click Send Email.



4. The Send Email window will open, defaulting to the Message tab.

The Message Tab



1. There are several fields and options available:

   - Subject - the subject line for the email
   - Profile - lists the available email profiles defined in your database. To manage the available profiles, see Working with Email Profiles.
   - Message Body - the large unlabeled area is for the actual text of the message. By default the system assumes you will create a "Rich Text" or "HTML" formatted message, since this enables the use of styles and font properties like bold, italic, etc. If you would prefer to create a plain text message, use the Format list below the message to switch.

     Note: While it is possible to cut/paste an email message from another source, such as

a word processing document, another email client, etc., you should be sure to send a test message to see how it converts. There are hundreds of character sets, fonts, and formatting tools out there, and their output may not convert neatly to HTML email. For things like bulleted/numbered lists, put the mouse cursor on a bulleted line and see if the Bullet toolbar button activates. If it doesn't, then it isn't being seen as a bulleted list and it may not display correctly. Reformat the pasted text as necessary.

- Format - Sets the text format for the message. Rich Text format provides a toolbar of formatting options that is unavailable with plain text.

  Note: If you start a message as Rich Text, add bold, italic, or other formatting and then switch to plain text, the formatting may remain in the message but since the message will not be sent as HTML it will not be used.

- Priority - the priority of the message. Note that there is no guarantee that the recipient's mail software will care about this setting.

- Load Message Button - enables you to load a saved message for editing or reuse. See Loading Email Messages for details.

- Save Message Button - enables you to save the active message, including attachments, under a unique name. Messages are stored in the database so they are accessible to all users.

- Fields Button - displays or hides the list of available fields to embed in the email text. When a field is inserted into an email message, the system will use the appropriate data for the associated member's record in place of that field. Note that database fields can only be used if you are using the Personalized Messages addressing method (see Addresses Tab below) because the system has to know what recipient’s record to use for the data. See Using Database Fields for more information.

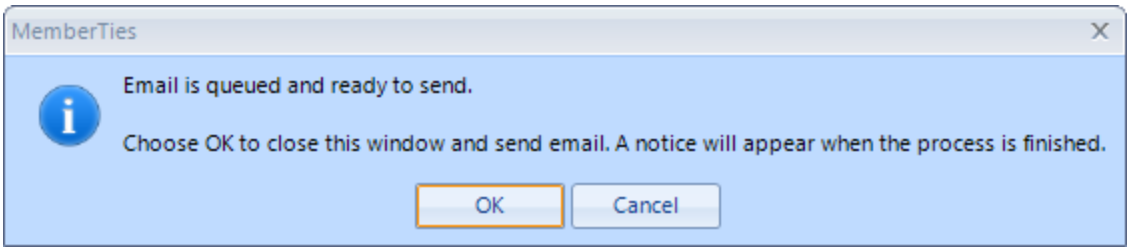
- Link Button - enables you to insert a hyperlink for a website URL into the message.

- Preview before sending - controls whether each message will be displayed in a preview window before it is sent

- Send - this button actually has two options. Click the arrow on the button to switch it from normal send mode to testing mode. In Test mode, the system does everything except actually hand the email to your mail server. So all address checking, paging, connection checks, etc., will happen, but no email will be sent.

- Sent Mail - opens the history of sent mail.

2. When the message is ready, click Send.

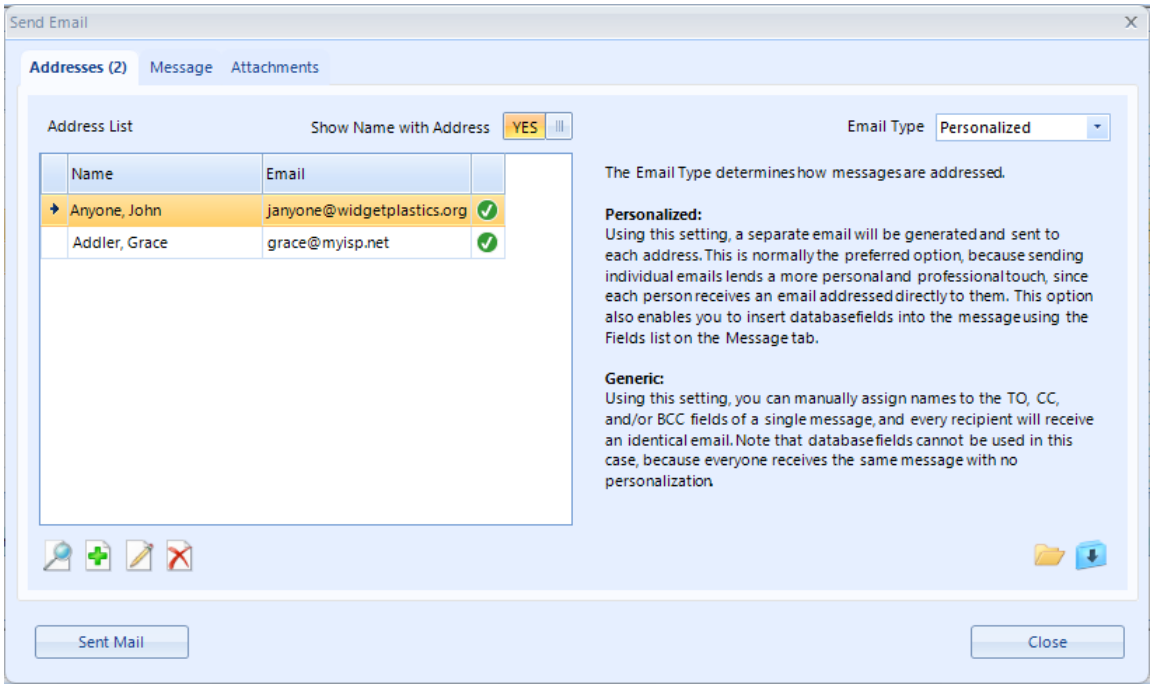


3. All email messages will be generated and sent to the email queue for background sending. At this point you can close the email window and continue working in elsewhere in the system while email is sent in the background. See Email Queue for more information.

The Addresses Tab

All recipients (everyone who will receive the email) are listed here.

Note: The text of the tab also indicates the number of recipients.



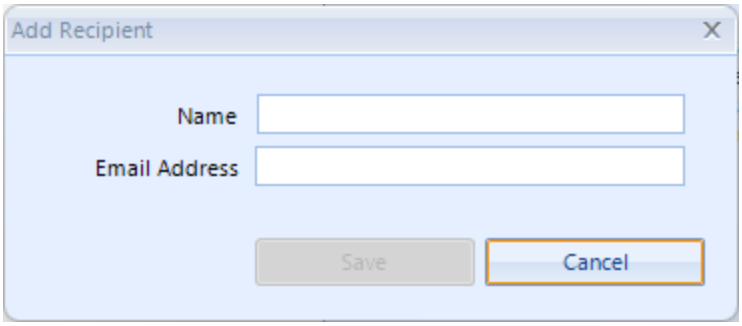
The most important setting on this tab is the **Email Type**. There are two options available:

- Personalized - this option causes the system to format a separate message for each person in the address list. When this option is selected, the list of database fields on the Message tab is available. This is the preferred option, because each person gets a uniquely addressed email, and never sees the addresses of any other recipient.
- Generic - this option enables you to choose which field (TO/CC/BCC) to use for each address. The "TO" field is normally used for the primary recipient(s) of the message;

the "CC" field is normally used for people of secondary importance (i.e., people being "copied" on the message); the "BCC" field is used for people who need to see the message but whose addresses should be invisible to all other recipients (i.e., people being "blind copied" on the message). Note that this method is often faster when sending an attachment, because the attachment only has to be processed one time, rather than once per recipient, however, it also looks more "spammy" because the receipt addresses are hidden, and it may red-flag your email by spam checkers.

After the Email Type is selected there are several additional options available

- Show Name with Address - controls whether the member name is displayed with the email address (i.e., show "John Smith <jsmith@myisp.com>" instead of just the email address)
- To search for one or more membership records and automatically add their email address(es) to the list, click the Search icon below the Address List.
- To manually add a new recipient to the list, click the Add icon. You will be prompted for the name and email address.

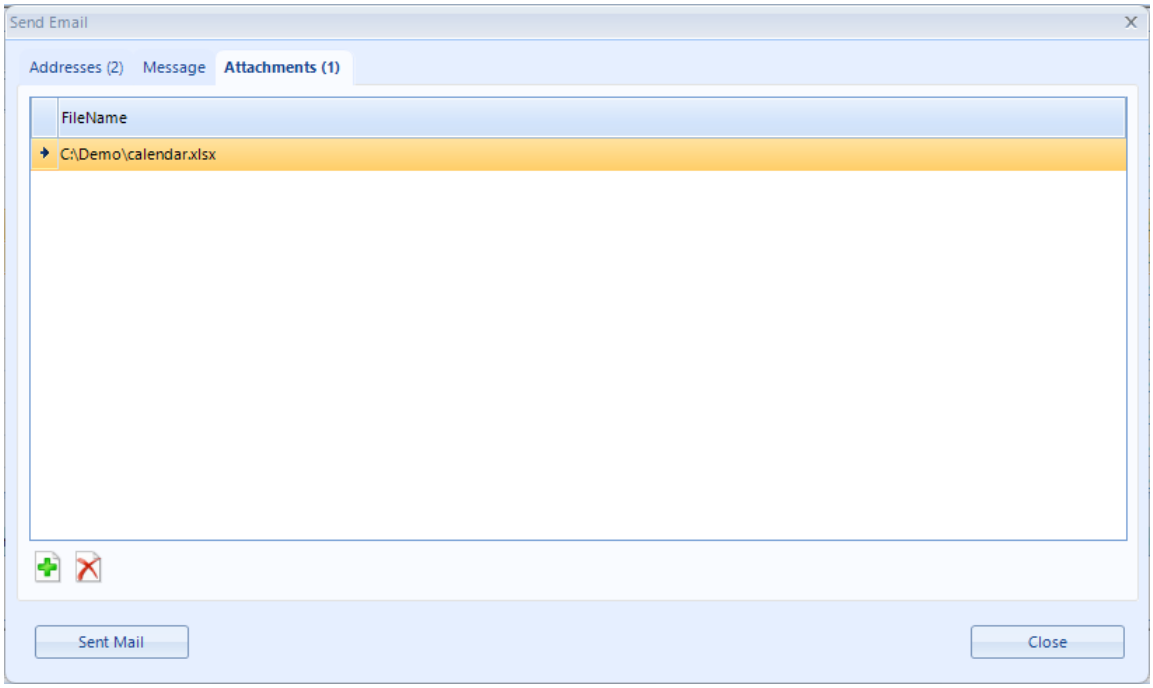


- To modify an existing recipient, select it and click Edit. Note that changes only affect the list, not the underlying member record.
- To delete an existing recipient, select it and click Delete. Note that this only affects the list. It has no effect on the underlying member record.
- To save the recipient list to a file for future reuse (including the designations for the TO/CC/BCC fields if appropriate), click the Save icon.
- To reload a saved recipient list, click the Open File icon. Note that reloading a save list causes all addresses to be appended to the existing list. This enables you to open several saved lists to create a combined list.

The Attachments Tab

All attachments that will be included with each message are displayed here.

Note: The text of the tab also indicates the number of files. i.e., "Attachments (1)" indicates there will be a single file attached to each message.



Click Add to select a file from your file system, or Delete to remove a file from the list.

Note: A common source of email delivery issues is very large attachments. With modern cameras, images can be extremely large, and attaching a newsletter PDF with dozens of high resolution images in it can mean each email message may be multiple MB in size. If you send an email that includes a 20 MB attachment, you may completely fill up their inbox space. Or the message size may be larger than their mail server allows (often defaulting to 8 MB).

If you have a large newsletter or document to send everyone, consider saving it on a public system like Box or Dropbox or any other location where you can send a link to the fine instead of the file itself. Then your recipients can download the file as needed. Your email will also be processed much more quickly.

12.2 Viewing the Email Queue

The email queue is used for sending email in the background, so the software isn't unavailable while working through a large list of messages. Many times, email will go into the queue and be sent so quickly that the queue will always appear empty. But it is used in the background for all email, no matter the number of recipients.

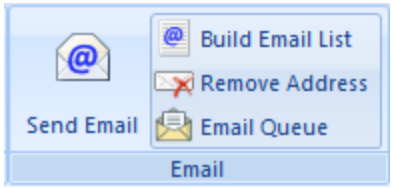
Note: The email queue cannot indicate whether or not an email message has been *delivered*, simply because the system has no visibility into or control over that. All MemberTies can do

is format the message and hand it to your mail server for processing. What happens from there is out of our control.

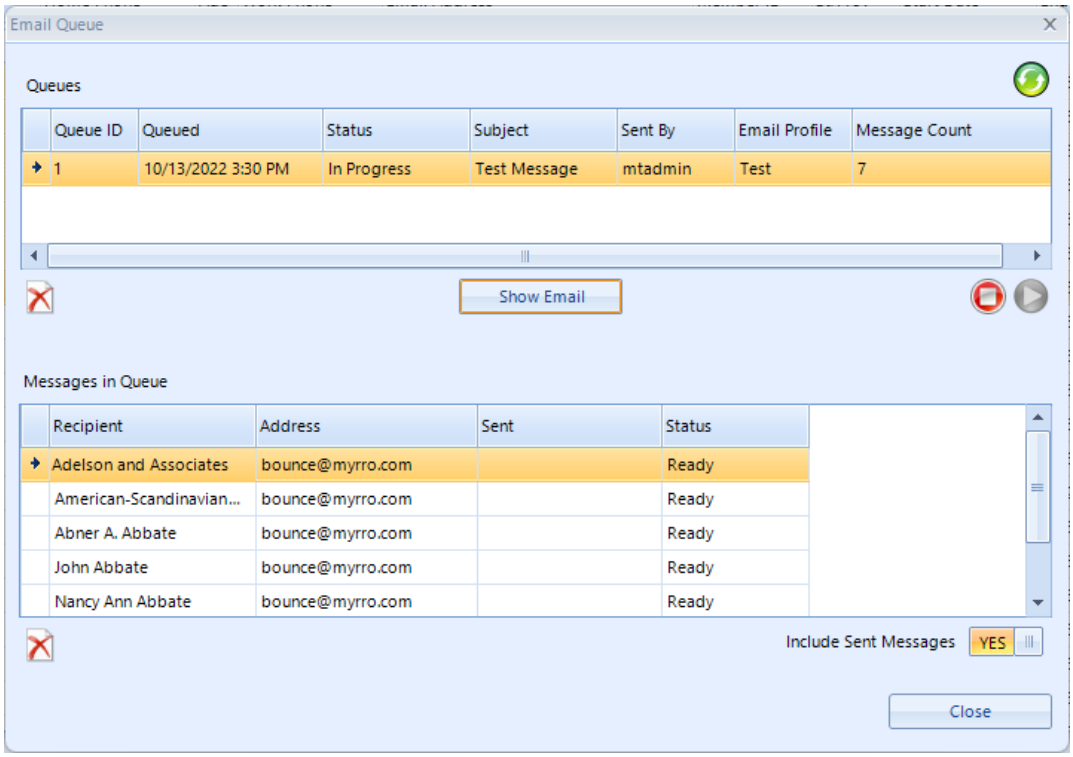
Viewing the Email Queue

1. Choose the Members, Groups, or Activities tab from the ribbon bar.

2. In the Email section of the ribbon, click Email Queue



3. The Email Queue window will open, listing any messages in the queue.



4. The queue is divided into two halves.

   - The top half lists each queue item. This "item" is an email email message that will in turn be sent to multiple people.

Show Email - Select a queue item in this list and click Show Email to list the messages in the bottom half.

- The bottom half shows each recipient of the queue item selected in the top list.

5. The queue includes the following options:
   - Refresh - queries the email queue and refreshes the display
   - Delete Queue - delete the entire queued item and all recipients within it.
   - Stop Message - stops processing of the selected queue item
   - Continue - continues processing of the selected queue item
   - Delete Recipient - deletes the selected recipient (has no effect if it has already been sent)
   - Include Sent Messages - controls whether the queue automatically hides messages as they are sent

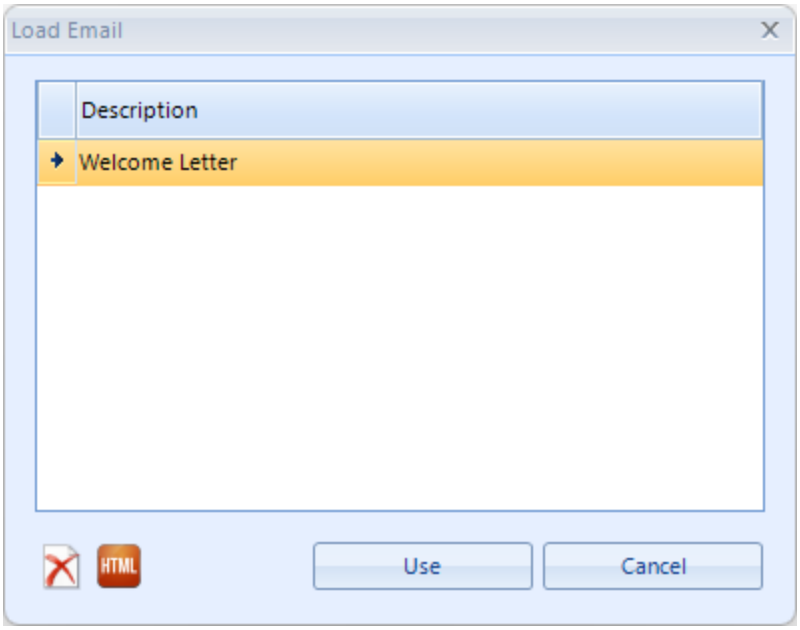
Note: If a queue fails and one or more messages do not send, you can select the queue, or individual messages, then right-click and start a new email using the selected email addresses. (The email body cannot be reloaded this way because the queue doesn't know what the unsent email was going to be.)

12.3 Loading Email Messages

Saved Email messages are stored in the database, and can be quickly reloaded to create a new message by any user.

Loading a Message

1. On the Message tab of the Send Email window, click Load Message.



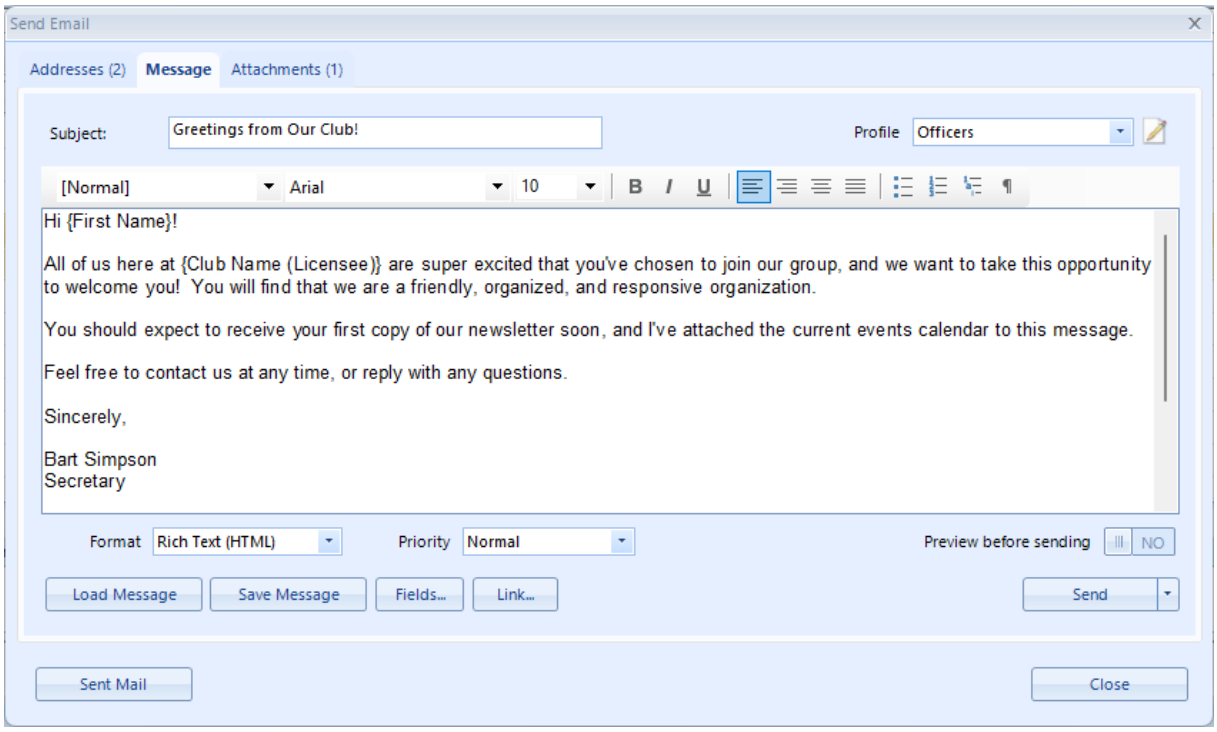
2. The Load Email window displays all previously stored messages. The following options are available:

   - Delete - permanently deletes the selected stored message
   - HTML File - enables you to load a complete HTML file that you may have created using an external HTML editing tool. Note that no link will persist between the original file and the email message, so if the external file is modified, it will need to be reloaded.

3. Click Save to load the selected message.

12.4 Using Database Fields

Inserting database field placeholders into a message means that the appropriate data for the member will be substituted for the field placeholder. In other words, you could select the First Name field from the field list as a salutation, and create something like:



In this example, the system will substitute "John" for the first name placeholder, and the name of your organization for the Club Name placeholder, when generating the email for John.

Adding Fields to a Message

1. With the email message displayed, click the Fields button to display the field list.

2. The Field List window can be dragged outside the borders of the email window to keep it available.

3. Place the cursor in your message where you want to insert the field, then click the field in the Field List. The placeholder for that field will appear in the message.

   Note: If necessary for readability, you can *carefully* modify the text of the placeholder. Click the placeholder text and change the text between the brackets. When you're finished, click the placeholder and make sure it auto-highlights. If it does not, then the system no longer knows it is a field placeholder and it will need to be redone.

   Note: Custom fields will only appear in the Field List if they have been defined as available to be used in Email.

   Note: If the only thing on a line is a field, and that field value is blank when the data is merged, that entire line will be removed. If you want to use a field that might be empty, and have the line remain even when the field is empty, there must be at least one other character of text on the line. This is controlled by the Remove Blank Lines preference.

4. If you are finished with the Fields window you can dismiss it by clicking Done. This will not affect any fields that have been used on the message.

Field placeholders will be saved if the message is saved.

12.5 Working with Email Profiles

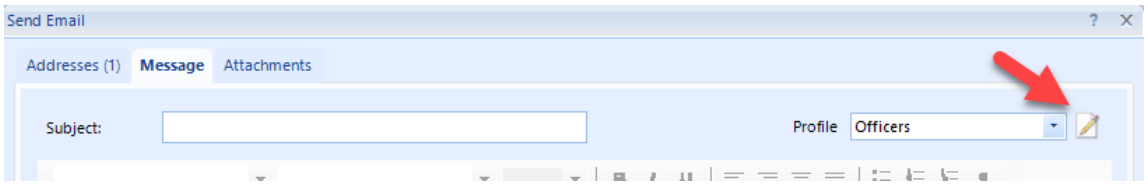
An email profile defines how MemberTies connects to your internet service provider's (ISP) email server to send email (you will need to know your log in credentials for your email account). It also specifies logging and limits to how mail is sent, as well as an signature to be used on email sent with the profile.

For help troubleshooting email issues, see Troubleshooting Email.

For some sample profile settings, see Email Profile Examples

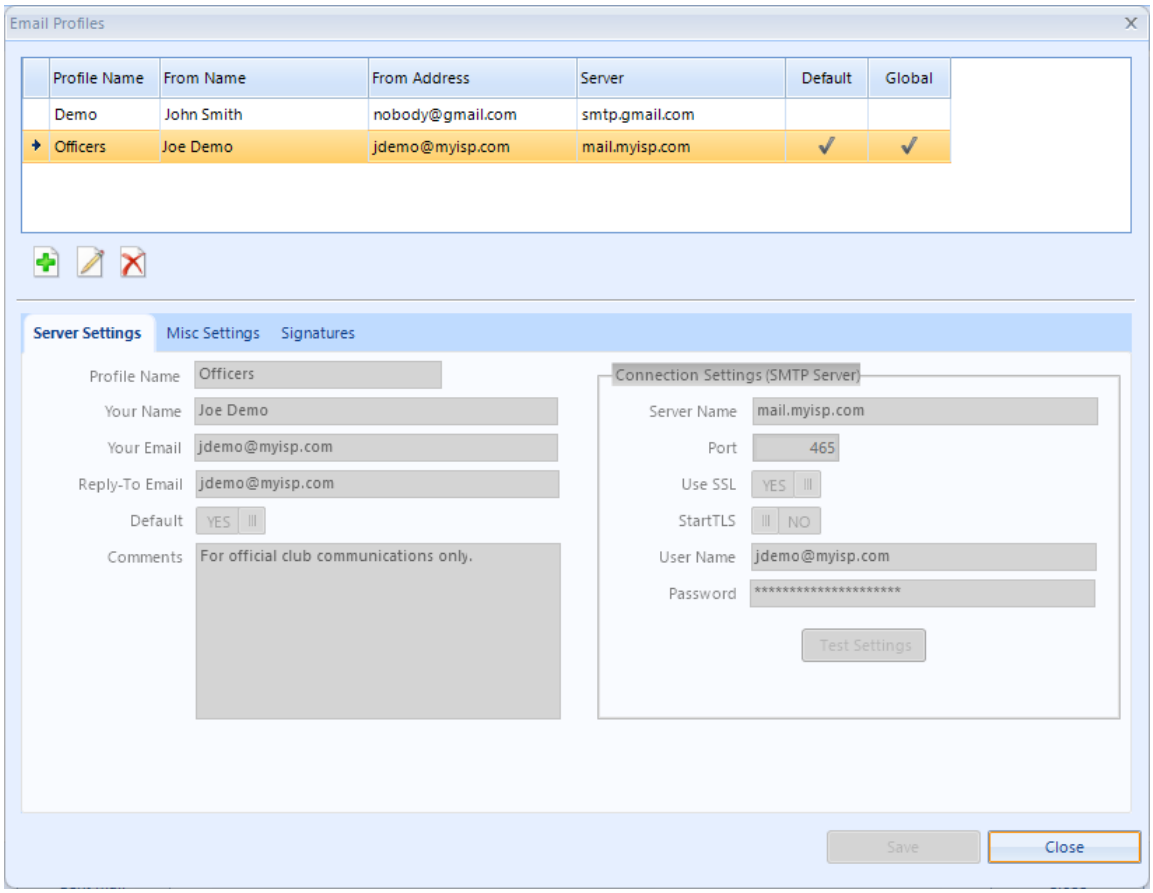
Working with Email Profiles

The email profile window is accessible from the Message tab of the email window, by clicking the Edit icon next to the profile list.



This Email Profiles window provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

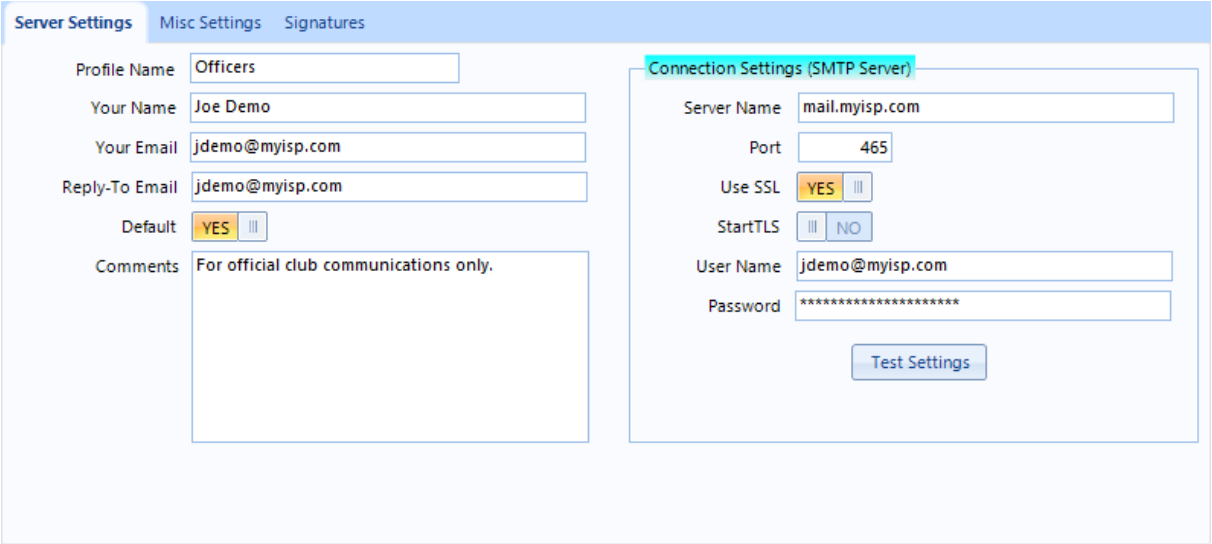
To create a new record, click Add; or, select an existing record and click Edit, or Delete.



The profile details are divided into three tabs:

- Server Settings - the information needed to connect and send mail through your mail server
- Misc Settings - logging, message limits, ad other per-message settings
- Signatures - optional plain text and rich-text email signatures

Server Settings Tab



The following fields are available:

- Profile Name - the name of the profile as it should appear in the Profiles list on the Send Email window
- Your Name - the name that should appear as the sender of the email. This is typically your first and last name, but it could also be something like, "Support" or "Sales Dept."
- Your Email - the email address that will display as the From address. This is typically your normal email address.
- Reply-To Email - the address to which any reply to your email should be sent. This is typically the same as Your Email, but not necessarily
- Default - controls whether this profile is automatically selected when the Send Email window opens
- Comments - general details about the profile
- Connection Settings
  - Server Name - the domain name or IP address of the server through which your ISP allows you to send mail. This might be something like "mail.myisp.com" or "myisp.com" or something entirely different. Contact your ISP if you do not have this information. Most service providers have a web page that explains how to configure "3rd Party Email Clients."
  - Port - the port on which the SMTP server "listens" for incoming mail. This is typically port 25 for standard transmission, or 465 for SSL encrypted transmissions.
  - Use SSL - select this option if your SMTP mail server expects you to use SSL encryption. If they don't explicitly say so, assume no SSL is involved. However, if they tell you that the SMTP port is 465, that is a common SSL port, so you'll want to turn on

SSL. Selecting this option automatically changes the SMTP port to the standard SSL port but you can change it if your server requires a different setting.

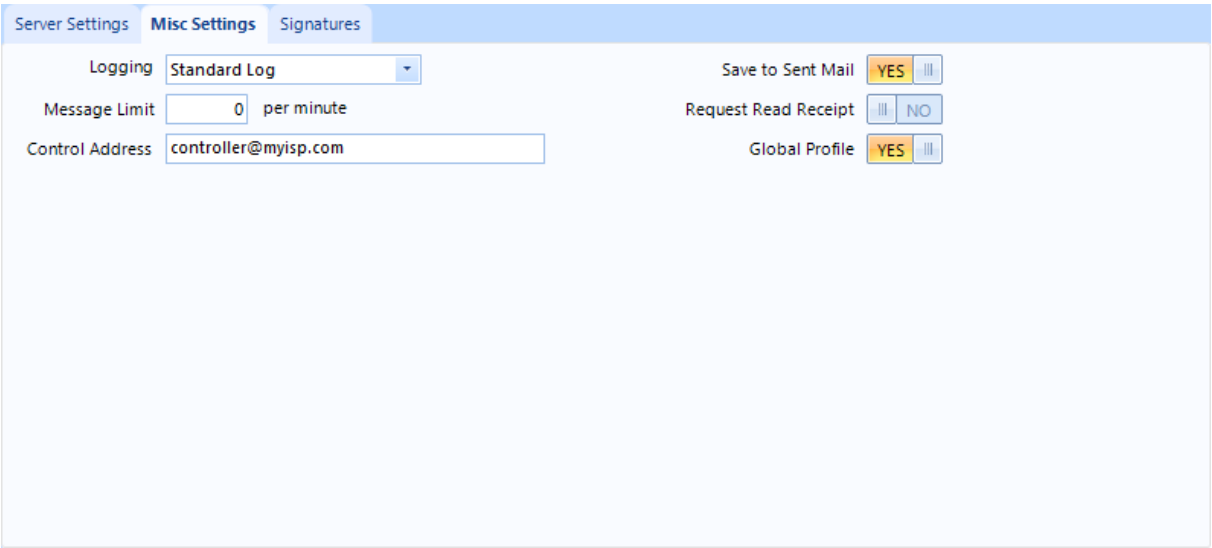
- o StartTLS - select this option if your SMTP mail server supports SSL over standard SMTP (port 25) instead of the special SSL port.
- o User Name - the user name for the SMTP account. Typically this will be your email address. This is not the same as your MemberTies user name.
- o Password - the password for the SMTP account. This is not the same as your MemberTies password.

Testing the Connection

You don't have to attempt to send an email to see if your settings are valid. When you are finished entering connection settings, click Test Settings. The system will attempt to make a connection to your mail server and will report the results.

Note: If the Test Settings button fails, it will not be possible to send email using the profile.

Misc Settings Tab



The following fields are available:

- Logging - choose whether to use a standard log, which records limited data, or the detailed log that records every message returned by the mail server. For tracking down email errors, the Detailed Log is best, but this log may become very large.
- Message Limit - the maximum number of messages that should be sent per minute. Once the maximum is reached, the system stops sending for the rest of the minute, and then reconnects to begin the next batch.

- Control Address - a final email address to which to send the message. This instructs the system to send a final email to a specific address as a check to verify that all messages were processed. The email will be addressed to a person called, "Control Address" at the address you specify.

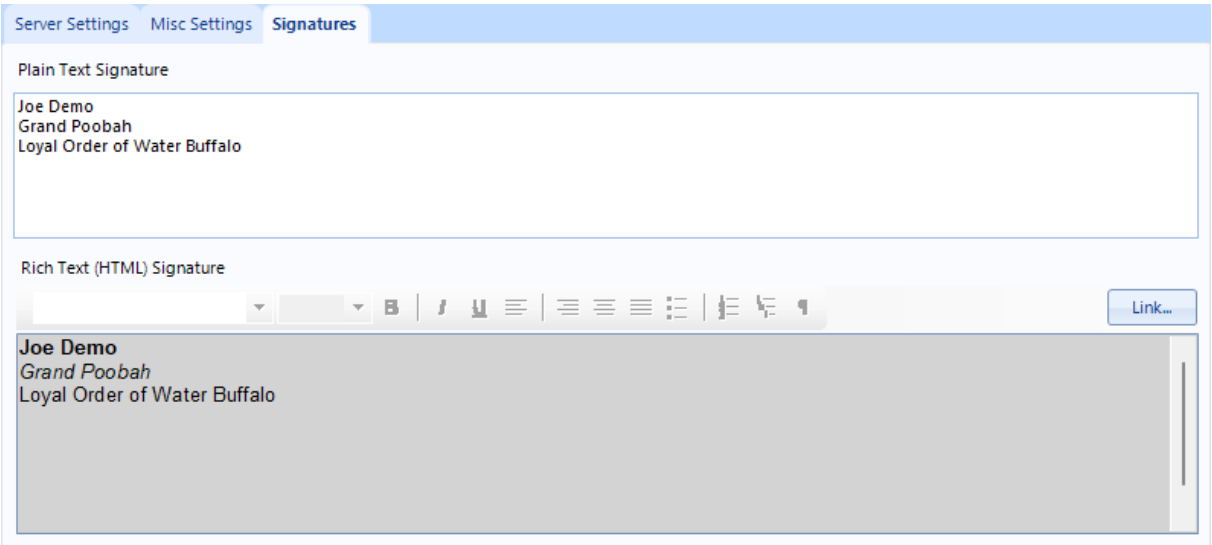
- Save to Sent Mail - controls whether a copy of the mail message will be saved to the Sent Mail list. Note that it is important to understand that a message will be saved to the Sent Mail list regardless of whether it is successfully delivered. All the system knows is that the message was sent to the specified mail server for delivery. It does not know whether the server ever delivered it, whether it bounced back, or whether or not it was read.

- Request Read Receipt - controls whether the email will be flagged with a read receipt request. This is a request that the receiving email program notifies you when the message is opened/viewed. Note that this is NOT fool-proof, and does NOT guarantee in any way that a message has or has not been received. Many people turn off read-receipts because automatically returning receipts is guaranteed to increase the amount of junk email you receive (because that automatic reply tells the spammer that your address is a real or "live," and therefore a good candidate for even more junk mail). But if the recipient has their email software configured to allow receipts, this option will request one.

- Global Profile - controls whether this profile is available to any logged in MemberTies user, or only the user who created it

Signature Tab

You can create a plain text and/or HTML signature. The system will use the appropriate signature based on the way you create the email message. If you never send plain text email, there is no need to create a Plain Text Signature.



12.6 Email Profile Examples

Here are some profile settings for some common email services.

For the most accurate settings for any email system, go to their support site and search for "3rd party email client" or "smtp settings" or something similar. Most providers will have a page that details the exact SMTP server, port, and SSL settings to use.

The idea solution for sending email will always be to own or rent your own email server somewhere. The volume of unsolicited mail (SPAM) continues to grow, and providers (especially *free* email services) are doing everything they can to make it harder and harder to send mail through their services with anything but their own email clients.

Hotmail (aka Windows Live)

- Your Email - you@hotmail.com
  Note: If your address is @live.com or some other flavor of Hotmail/Windows Live, substitute the appropriate email address in the example.
- Server - smtp.live.com
- Port - 25
- Use SSL - Yes
- Use StartTLS - Yes
- User Name - you@hotmail.com
- Password - your hotmail password

Gmail

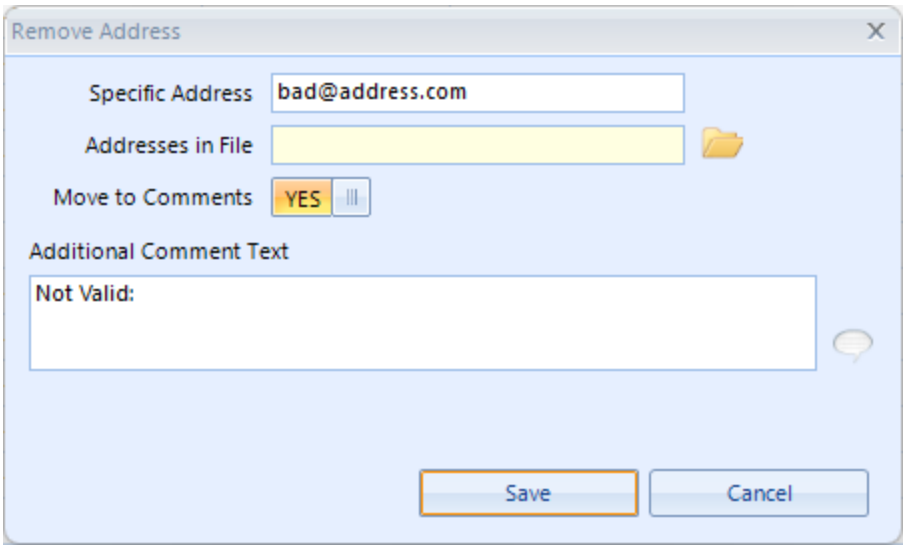
- Your Email - you@gmail.com
- Server - smtp.gmail.com
- Port - 465
- Use SSL - Yes
- Use StartTLS - No
- User Name - you@gmail.com
- Password - your gmail password - see below

Note: Gmail's requirements are constantly changing. You may need to create an "app password" in your google account, and use that as the password for your email profile. More information about app passwords is available on the google site, as of this writing, the URL is: https://myaccount.google.com/apppasswords

12.7 Removing Email Addresses

If you send an email and receive a "bounce" back indicating the address is not valid, you can use the "Remove Address" window to automatically search for the member and/or group records containing the invalid address, move the address to the Comments field, and even precede the new comment with text like, "Not Valid:"

Note: MemberTies does not receive email itself. Any bounce back messages will arrive at the "reply to" address in whatever email software you normally use.



The following fields are available:

- Specific Address - a specific address to find and remove
- Addresses in File - if you have a text file containing a list of invalid addresses (one per line), click the Browse icon and choose the file. All addresses in the file will be processed.
- Move to Comments - controls whether the found address is copied to the Comments field of the Member/Group record.
- Additional Comment Text - additional text to add to the comment, preceding the email address. For example, if this field contains "Not Valid:", the comment stored on the record will be similar to "Not Valid: bad@address.com"

Removing Addresses

1. Enter the address or open a list of addresses to remove
2. Click Save to begin the process of finding and removing addresses. The total number removed will display in the lower left when the process is complete.

3. Repeat the process for any other addresses or lists.
4. Click Cancel when finished.

12.8 Building an Email List

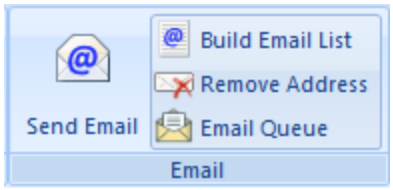
You can build an email list from a selection of records. The list can be saved as a text file, or copied directly to the clipboard so you can paste it into an email program. Only unique email addresses are included in the list. If more than one record has the same address, the address will only appear in the list once.

When the email list is created, only records containing an entry in the Email field will be used. If you select records that do not contain an email address, the list will be empty.

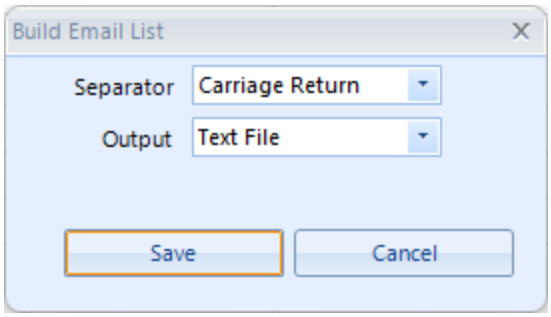
Building an Email List

1. Choose the Members, Groups, or Activities tab from the ribbon bar.

2. In the list that opens, select the records to to be added to the list. You can use the standard Windows selection methods.
3. Click Build Email List from the Email section of the ribbon.



4. The Build Email List window will open.



5. The following fields are available:
   - Separator - the type of separator, or delimiter, to place between names in the list. The list will be generated as one long line (unless you choose a carriage-return separator), with each email address separated from the previous one by the

separator you choose. The type of separator to choose will depend upon what you want to do with the list and/or what your email software requires.

- Output - Choose the way you want to handle the finished list. You can copy the list immediately to the clipboard, so you can open your email program and paste the whole list into an address field, or you can save the list to a text file for future use.

  For example, if your email program expects a semicolon between each address, you would use the semicolon separator, and then you could choose an output to the clipboard so that you could immediately paste the results into the "To:" field of your email program.

6. Click Save to generate the list as requested.

12.9 Viewing Sent Mail

With MemberTies Professional a copy of each email you send can be saved in a Sent Mail list. The message, the address list, and the attachment list is saved just as it was defined on the Send Email window.

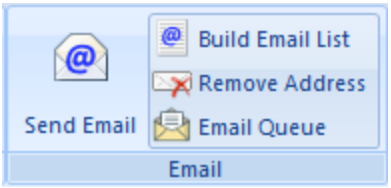
Sent Mail is accessible from the Send Email window. The sent mail list enables you to reload a message for resending, or to reload only certain addresses, attachments, or the subject and body of the message.

Note: Due to the potentially large volume of sent mail messages, the windows shows sent mail for the past 30 days by default. You can adjust the date range to something different if you wish, as described below.

Viewing Sent Mail

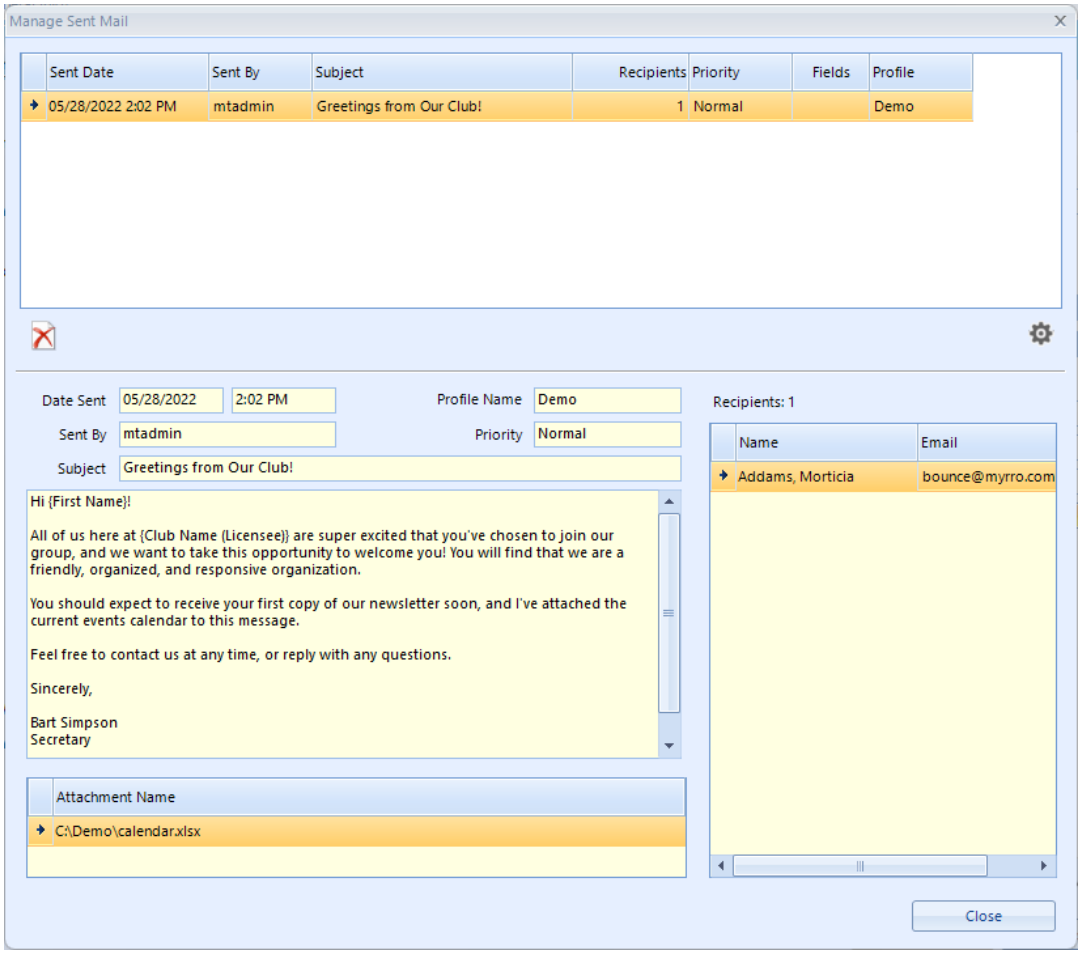
1. Choose the Members, Groups, or Activities tab from the ribbon bar.

2. In the Email section of the ribbon, click Send Email to view all sent mail.

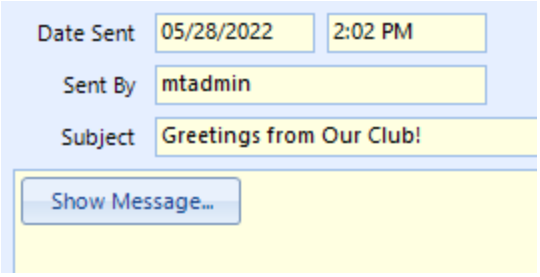


Alternatively, open a member record and click the Sent Mail icon next to the email field, to open this window for that specific member.

3. The Manage Sent Mail window will open



By default, messages are only loaded into the sent mail list. To display the body of the message, click the Show Message button located in the body text area. (In the above example, we've already clicked this button, so the button is hidden.)



Deleting Messages

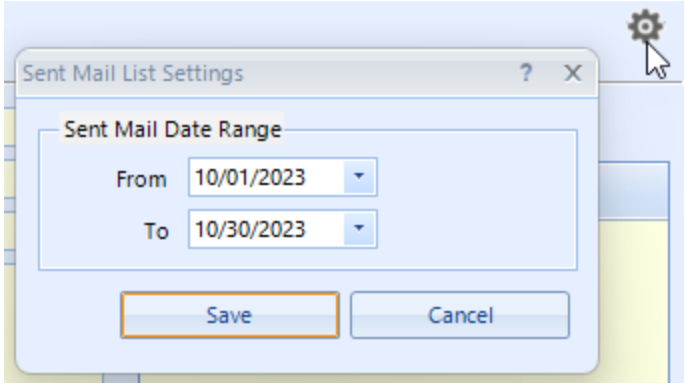
To permanently remove one or more messages from the Sent Mail list, select the messages you want to remove, then click Delete.

Reloading a Message

Click the Copy as New Email button to load the message into the active Send Email window. This will load the subject and body text, all attachments and all recipients.

Filtering the List

By default this window includes the past 30 days of sent mail. However, the Settings icon enables you to control this date range:



The following options are available:

- From - the earliest sent message date to include. If you delete the value in this field, it will automatically use the date 30 days in the past.
- To - the latest sent message date to include. If you delete the value in this field, it will automatically use the current date.

12.10 Troubleshooting Email Delivery

The vast majority of email issues can be traced back to an incorrect email profile. When you send email, the profile you use tells MemberTies what server to use, how to log in, how to authenticate, and how to send. If anything is wrong, your mail server, not MemberTies, will reject the message.

Basic Checks

Here are the most common email mistakes:

- Did not click the Test button on the Email Profile window to test the settings. If the test fails, it will be impossible to send email.
- Did not set a user name/password for SMTP Connection Settings

- Used the MemberTies user name and password instead of the user name and password provided by your Internet Service Provider for your mail server.
- Set the "From" and/or "Reply To" values on the email profile to normal names, rather than email addresses. i.e., used "John Smith" instead of jsmith@myemail.com
- Did not enabled SSL when the mail server requires it.

Most ISPs will have a website with a support area that provides the information you need to create a valid email profile. They will provide the SMTP server name, the port to use, whether to use SSL and StartTLS, etc.

The best way to troubleshoot other email errors is to edit your email profile and set Logging to "Detailed." This will record every communication to and from the mail server. You should only use this for troubleshooting, because the logged data may include your user name and password, and potentially other details that shouldn't be left laying about.

Enabling/Using the Log

1. Enable the Detailed Log on your email profile (see Working with Email Profiles for details)
2. Send an email message.
3. After sending completes, open the log file. The log will be saved to your Log directory, typically Documents\MemberTies\Logs\mt_email_log.txt.

   Note: If your computer does not know how to open .log files, right-click the file and choose Open With, and then pick Notepad or your favorite text editor.
4. Review the log. Typically you will see an entry that tells you what is wrong. For example, this message appeared in the log even with Standard logging, when we didn't use an app password for a Gmail account:

```
03/02/2022 1:59:09 PM: ********************************************************
03/02/2022 1:59:09 PM: Processing Email Queue 3
03/02/2022 1:59:09 PM: ********************************************************
03/02/2022 1:59:09 PM: Standard logging enabled.
03/02/2022 1:59:09 PM: Connecting...
03/02/2022 1:59:09 PM: Connection successful.
03/02/2022 1:59:09 PM: Unable to login to server account: An application specif
Refer to the help pages for your email provider for instructions to create an a
for your email profile.
03/02/2022 1:59:24 PM: Connecting...
03/02/2022 1:59:25 PM: Connection successful.
03/02/2022 1:59:25 PM: Queue 3 completed with status: Failed. Sent: 0 Failed: 1
03/02/2022 1:59:25 PM: *** End ***
```

   This message sequence makes it clear what we need to do. After changing the password to a google app password, we sent a message successfully:

```
03/02/2022 2:08:23 PM: ********************************************************
03/02/2022 2:08:23 PM: Processing Email Queue 4
03/02/2022 2:08:23 PM: ********************************************************
03/02/2022 2:08:23 PM: Standard logging enabled.
03/02/2022 2:08:23 PM: Connecting...
03/02/2022 2:08:24 PM: Connection successful.
03/02/2022 2:08:24 PM: Sending message.
03/02/2022 2:08:24 PM: Connecting...
03/02/2022 2:08:24 PM: Connection successful.
03/02/2022 2:08:24 PM: Sending message.
03/02/2022 2:08:25 PM: Queue 4 completed with status: Sent. Sent: 1 Failed: 0
03/02/2022 2:08:25 PM: *** End ***
```

There are, of course, a lot things that can go wrong when sending email. If none of the above helps, send an email to support@myrro.com with a copy of the email log and a screen shot of your email profile, and we'll try to help.

12.11 Troubleshooting Email Display

If your email arrives and contains bizarre characters that don't look like what you sent, it normally means that something in the message could not be converted into HTML (formatted). If a message is typed directly in the email window from scratch, it should all display correctly; but, if the message has been copy/pasted from another source, like a word processing document, PDF file, or even another email program, things can go wrong. Incompatible formatting, unknown fonts, and character set and code page issues can cause lots of problems that we cannot control.

The best thing to do when using copy/pasted email text is to send a test message to yourself first. Don't test the output by sending a message to 5,000 members! Go to the Addresses tab and remove any addresses there, add one entry for yourself, and send the message.

In some cases, you can tell whether or not a message is going to convert neatly by putting the cursor in the message and looking at the formatting toolbar above the message. If the cursor is in a line that is bulleted and the Bullet toolbar button doesn't activate, then the text probably isn't recognized as a bullet and it should be reformatted.

Remember -- when you're unsure, send a test message first!

Part XIII

Group Records

13 Group Records

13.1 Group List Overview

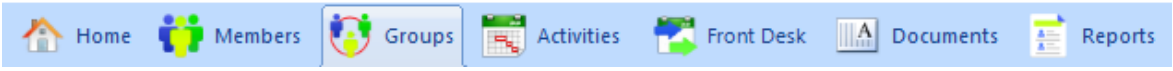
The Group List lets you access all of the group records in the database. A dedicated ribbon of commands enables you to access group-related functionality.

A *group* is any collection or subset of your membership. it might be a committee, a team, an email group, etc. Since you can relate any member to any group, this provides a useful means of arranging members for various purposes. When members are assigned to a group you can set a group-specific start and end date as well.

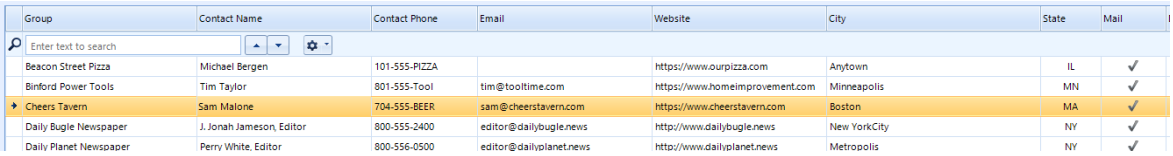
You can add multiple members to a group directly from the Membership List. See Adding Members to a Group for details.

Opening the Group List

1. To open to the Group List, choose the Group tab from the ribbon bar.



2. The Group List will display.



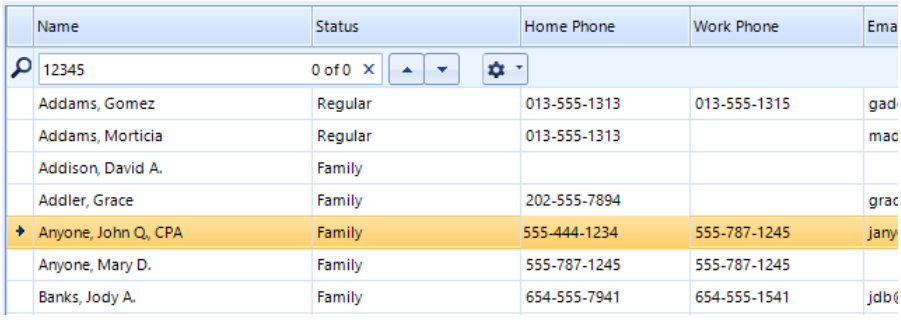
Group	Contact Name	Contact Phone	Email	Website	City	State	Mail
Enter text to search							
Beacon Street Pizza	Michael Bergen	101-555-PIZZA		https://www.ourpizza.com	Anytown	IL	✓
Binford Power Tools	Tim Taylor	801-555-Tool	tim@tooltime.com	https://www.homeimprovement.com	Minneapolis	MN	✓
Cheers Tavern	Sam Malone	704-555-BEER	sam@cheerstavern.com	https://www.cheerstavern.com	Boston	MA	✓
Daily Bugle Newspaper	J. Jonah Jameson, Editor	800-555-2400	editor@dailybugle.news	http://www.dailybugle.news	New YorkCity	NY	✓
Daily Planet Newspaper	Perry White, Editor	800-556-0500	editor@dailyplanet.news	http://www.dailyplanet.news	Metropolis	NY	✓

If you're not familiar with selecting records in lists, please see this topic on how to select records from lists in Windows.

Finding a Record in the List

When the list is displayed, you can quickly find a record by typing in the search field at the top of the list. Any text typed in the field will be sought throughout all data displayed in the list. Press CTRL+F or click in the search field to activate it. Any text typed in the field will be sought throughout all data displayed in the list.

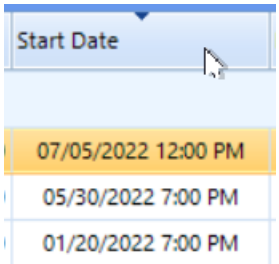
Note: A group preference controls whether the field is activated automatically when the list is refreshed.



Name	Status	Home Phone	Work Phone	Ema
12345	0 of 0			
Addams, Gomez	Regular	013-555-1313	013-555-1315	gad
Addams, Morticia	Regular	013-555-1313		mac
Addison, David A.	Family			
Addler, Grace	Family	202-555-7894		grac
Anyone, John Q., CPA	Family	555-444-1234	555-787-1245	jany
Anyone, Mary D.	Family	555-787-1245	555-787-1245	
Banks, Jody A.	Family	654-555-7941	654-555-1541	jdb(

Changing the Sort

Click the column heading of any column to sort the list by that column. The following example shows a date column being sorted in descending order, so the most recent dates are at the top.



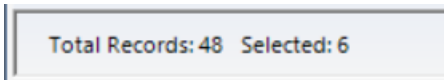
The first click will sort the column in ascending order, the second click will sort the column in descending order,and a small arrow icon will indicate the current sort direction.

Widening a Column

If you need to read especially long entries, just position your mouse pointer between the column headings until the cursor changes to a double-headed arrow, then drag the column to the size you want.

Refreshing the Data

When you add a record or change data on the list, the system will try to refresh the modified row so that you see the change immediately. If the change doesn't appear for some reason, you can press F5 or click the Refresh button on the ribbon to re-retrieve data from the database. Note that the number of records shown on the list, and the current number of selected rows is always displayed in the status area below the list.



Exporting Data

You can easily export (save) data from the view in various formats, including PDF for easy printing. See Exporting Data for details.

Working with Records

The ribbon bar provides access to everything related to the list records.

13.2 Group Ribbon Bar

The ribbon enables you to access all functionality that isn't specific to a single record (for which you would need to open a record from the list). The available icons may vary based on standard vs professional version, and security settings.

The Group Ribbon

The general use of each button is described below. Click any option to go to the help for that area.

- Search - open the search window to change find specific records for the list
- Export - save the list data to a PDF file or other format
- Refresh - re-retrieve the list data from the database
- Add - or press CTRL+N to create a new record
- Edit - or press CTRL+Enter to open the selected record for editing
- Copy - or press CTRL+D to duplicate the selected record
- Delete - or press CTRL+DEL to delete the selected records
- Views* - choose or create a different layout of columns for the list
- Previews* - choose one or more blocks of data to display below the list
- Send Email* - send email to the selected records
- Build Email List - export a list of email addresses from the selected records
- Remove Email Address - automatically find and remove an email address from any record containing it (this is not restricted to the Group list)
- Email Queue* - display the list of emails currently queued to be sent (this is not restricted to the Group list)
- Add Postings* - add a posting to all selected records
- Delete Postings* - delete postings from records based on criteria
- Toggle Flag - update the Include in Mailings or Auto-Relate flag on all selected records

- Website - open the your default web browser to the website on the record

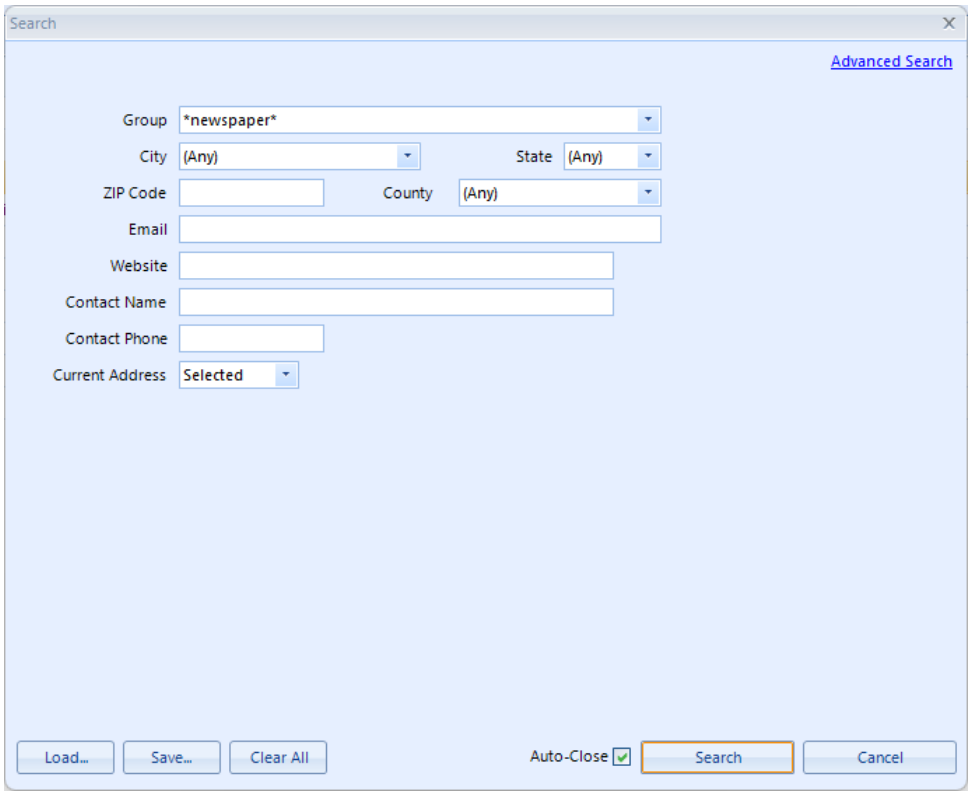
*Professional version only

13.3 Searching for Records

The search function enables you to search for a subset of group records to display on the list. If you only have a few dozen records, this may never even be necessary.

Searching for Records

1. On the Group ribbon, choose Search.



See the Search Overview for more details about using the Search window.

2. Enter your search criteria or choose Load to reload a previously saved search.

Note: The search window always opens with the Basic search layout. You should think of a basic search as a "this and this and this" style of query. In other words, i the example above we selected "*dinner*" for the activity name (meaning the name has to include the word "dinner" somewhere) and chose Location Type = "Hotel/Motel". So the search essentially find all dinners held at hotels, but not dinners held anywhere

else. So if an activity is called "Monthly Dinner" but the location type is "Beach", it will not be found.

If you would rather create a more complex advanced search, click Advanced Search in the upper right to change the layout.

See the search overview for complete details about using basic and advanced searches.

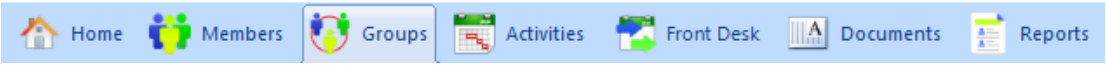
3. When you have entered or loaded your search criteria, click Search. The results will appear on the list behind the window, and if it looks good, you can close the window. (If the Auto-Close box was ticked before you clicked Search, the window will close automatically.)

13.4 Copying a Group

When copying a group from the Group List, a few options are available to control how much of the group is actually duplicated.

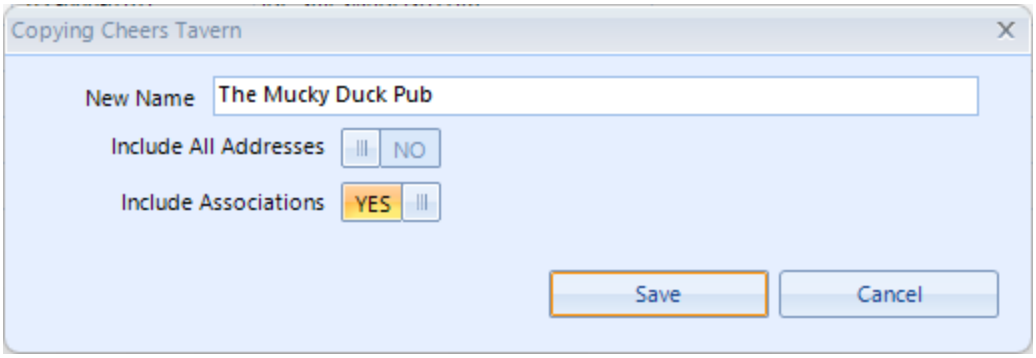
To Copy a Group

1. Choose the Groups tab from the ribbon bar.



2. In the Records section of the ribbon choose Copy.

3. The Copy window will open so you can set the new name and options:



4. The following fields are available:

- New Name - the name for the new group
- Include All Addresses - controls whether non-active addresses of the existing group are copied to the new group. If this is off, only the active address is copied.
- Include Associations - controls whether all associated members are associated to the new group

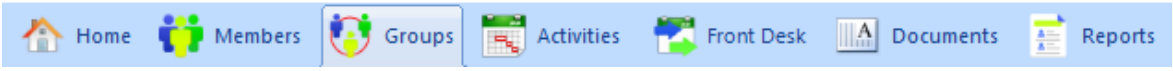
5. When ready to copy, click Save.

13.5 Toggling Flags

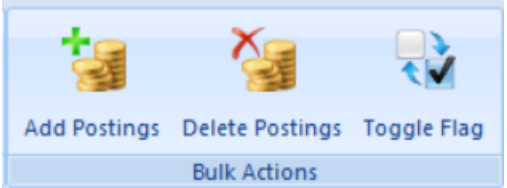
There are several "flags" on the group record that can be updated across all selected records from the group list.

Toggling Flags

1. Choose the Groups tab from the ribbon bar.



2. In the list that opens, select the records to be updated. You can use the standard Windows selection methods.
3. In the Bulk Actions section of the ribbon, click Toggle Flag.



4. The Toggle Flag window will open.

5. Choose the flag to update, then click Save. The system will switch the selected flag from its current setting to the opposite.

Note: A refresh of the list may be required to see the updates.

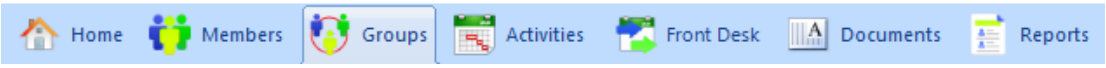
13.6 Working with Groups

13.6.1 Group Overview

New group records can be added to the database whenever the Groups List is active.

Working with Groups

1. Choose the Groups tab from the ribbon bar.



2. In the Records section of the ribbon choose Add to create a new group, or select an existing group in the list, and choose Copy, Edit or Delete.

3. The Edit Group window will open with the General Info page selected. If this is a new record, you must complete the General Info page before you can switch to other pages. See below for descriptions of each page:

   - General Info - provides the basic contact information for the group
   - Assigned Items - lists all items (category/item combinations) assigned to this group
   - Membership - lists all membership records assigned to this group
   - To Do List - lists all open and closed to-do items for this group
   - Dues Postings* - lists all postings applied to this group
   - File List - lists any associated files or documents
   - Custom Fields - displays all custom fields defined for groups

4. Complete all appropriate information, then click Save.
5. When finished, click Close.

Notes

- Your changes to the group may not appear in the Group List until it is Refreshed.
- If you're using MemberTies Professional, deleting a group will also remove all associated Income and Expenses, as well as all associations between members and that group. However, deleting the group has no affect on the membership records themselves.
- An Auto-Save preference controls whether the system prompts you to save or cancel changes when changing pages.

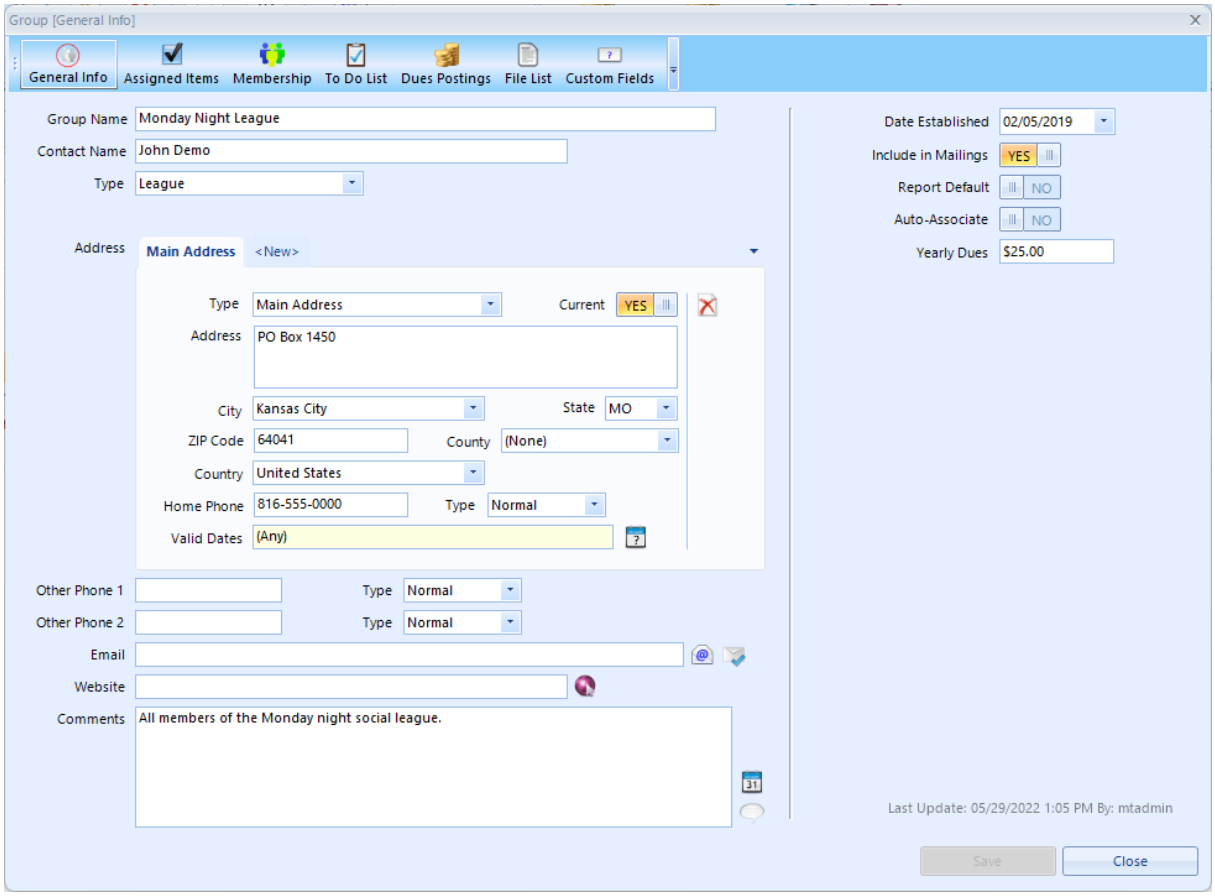
Changing the Page Order

If there are pages you never use, or pages that you use more than others, you can control which pages appear on the window. See Changing Page Order for more details.

* Professional Version Only

13.6.2 General Info Page

This page contains basic contact information for the group.



The following fields are available:

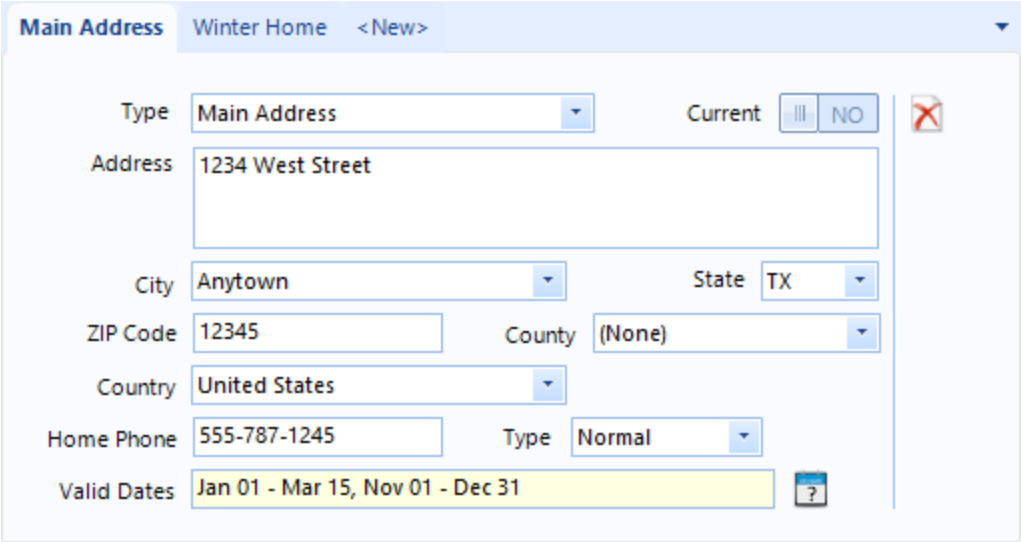
- Group Name - the name of the group
- Contact Name - a primary contact name
- Type - the general type or category of the group. Values can be preloaded, but new entries can also be entered and you will be prompted to add the new entry to the list. See Group Types for more information.
- Address - the group address. See Address Overview for details about entering addresses.
- Other Phone 1 & 2 - groups provide for two additional phone numbers in addition to the standard number saved with the address
- Email - the group general email address
- Website - the group website
- Comments - general details about the group
- Date Established - the date the group was initially created
- Include in Mailings - indicates whether the group should be selected on mailing label reports
- Report Default - indicates whether the group should be the default selected group on reports that include the group name as criteria. Only one group can be identified as the default.
- Auto-Associate - indicates whether all new member records should be associated to the group automatically
- Yearly Dues - the yearly dues amount for membership in the group

13.6.2.1 Address Overview

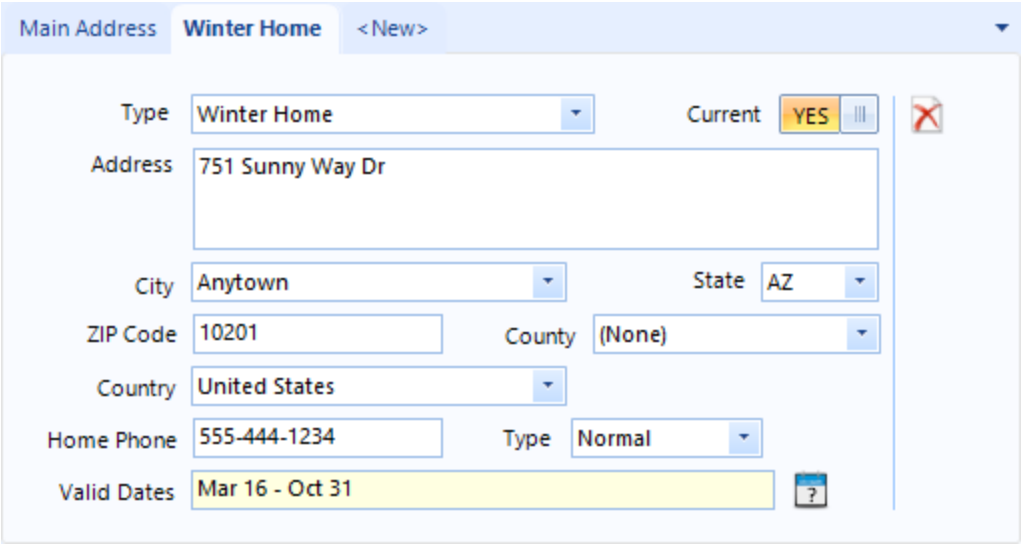
Member and Group records support addresses.

The standard version tracks a single address. The professional version enables you to create multiple addresses by clicking the "<New>" tab. In this case we created a second address called Winter Home.area that supports a single address (for the standard version) or multiple addresses (for the professional version).

The two versions of the address area are shown below



Standard Version Address



Professional Version Address

Note: The word "State" changes to "Province," and "ZIP Code" changes to "Postal Code" if the Language preference is not US English.

The following fields on the address need a little more explanation:

- Type - each address must be given a type that can be used as report criteria. (This is most useful in MemberTies Professional where multiple addresses can be created for each membership record, because it enables you to run a report to find anyone with a "Work Address" located in "My Town", for example.

  - In the Standard version, the type is assigned in the Address Type miscellaneous preference.

- In the Professional version, a you can choose from the list of Address Types. See Address Types for more information.

- Address - the complete "street address," excluding geographic data like city, state, etc. Multiple lines are allowed. For example,

```
100 Main Street
Apt 6
```

- City - lists all cities that are defined in the database. Values can be preloaded, but new entries can also be entered and you will be prompted to add the new entry to the list. The city marked as the default will be used automatically on new address records. See Cities for more information.

- County - lists all counties defined in the database. Values can be preloaded, but new entries can also be entered and you will be prompted to add the new entry to the list. The county marked as the default will be used automatically on new address records. See Counties for more information.

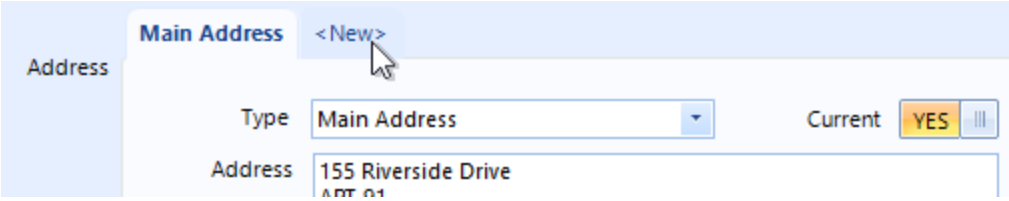
- State - lists all states/provinces defined in the database. The State marked as the default will be used automatically on new address records. See States for more information.

- Country - lists all countries defined in the database. The Country marked as the default will be used automatically on new address records. See Countries for more information.

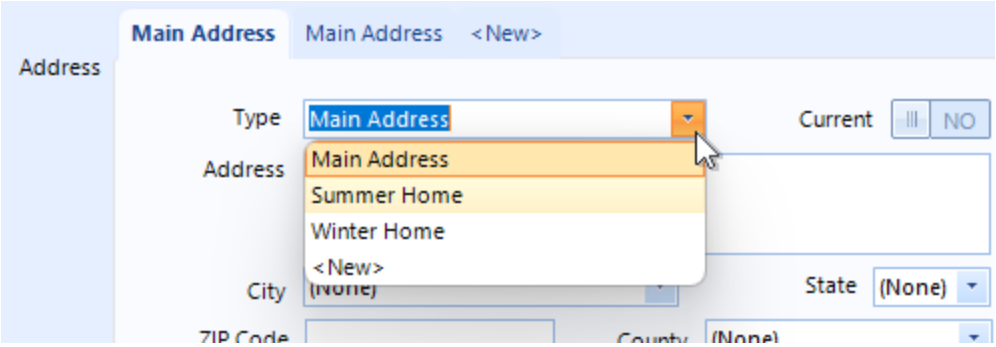
- Date Ranges* - If a record has addresses that are valid only at certain times of the year, you can have the system automatically keep the proper address current by creating one or more date ranges within which each address is valid (see below).

Adding a New Address

Each address displays in its own tab. To add a new address, click "<New>" and a new tab will appear.



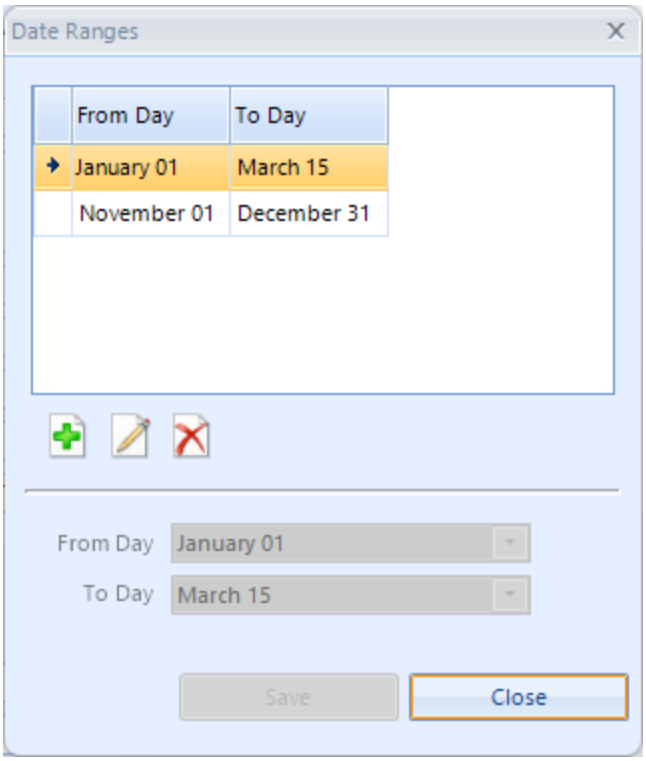
The new address is created with the default Type. Change the type to whatever is appropriate.



Using Date Ranges*

In some cases, the additional addresses may be specific to a summer/winter home, or home/school address, where you know an address is valid during a certain period of the year. Clicking the calendar icon next to the Valid Dates field enables the assignment of the date range. Once set, the system will use the date range to decide which address is active.

This window provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.



Crossing Years

When a date range crosses one year to the next, i.e.,

```
November 01 - March 15
```

the system will notice this when you save, and it will automatically split it into two entries:

```
November 01 - December 31
January 01 - March 15
```

Note: if you use a date range for **any** address on the record, you must ensure that **all** days of the year are covered with one address or another.

Ensuring that all days are covered allows the system to automatically set the appropriate address as Active based on the day of the year. Addresses using date ranges are re-evaluated every time you log in.

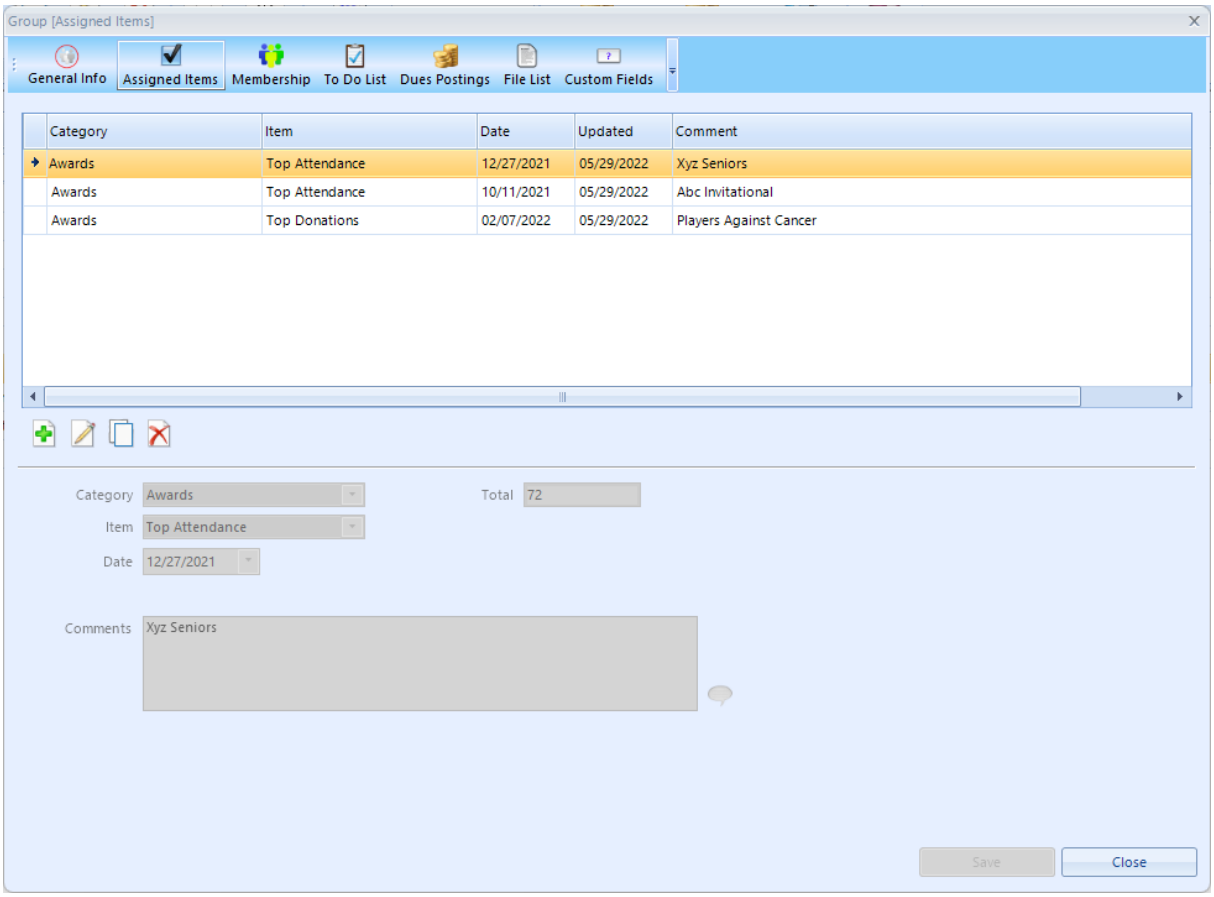
* Professional Version Only

13.6.3 Assigned Items Page

You can create a system of categories and items that can be assigned to members and groups (or both). This page contains enables management of assigned items for a Group. See Categories & Items for details about setting up categories and items.

This page provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

To create a new record, click Add; or, select an existing record and click Edit, Copy, or Delete.



The following fields are available:

- Category - lists all categories available to Groups. This selection controls the available Items.
- Item - lists all items available for the selected Category
- Date - a date to associate with the assignment
- Comments - general comments for the assignment

Note: In this example, we've activated one of the optional numeric fields, and named it "Total" so that it is available when adding items. See Categories & Items for details.

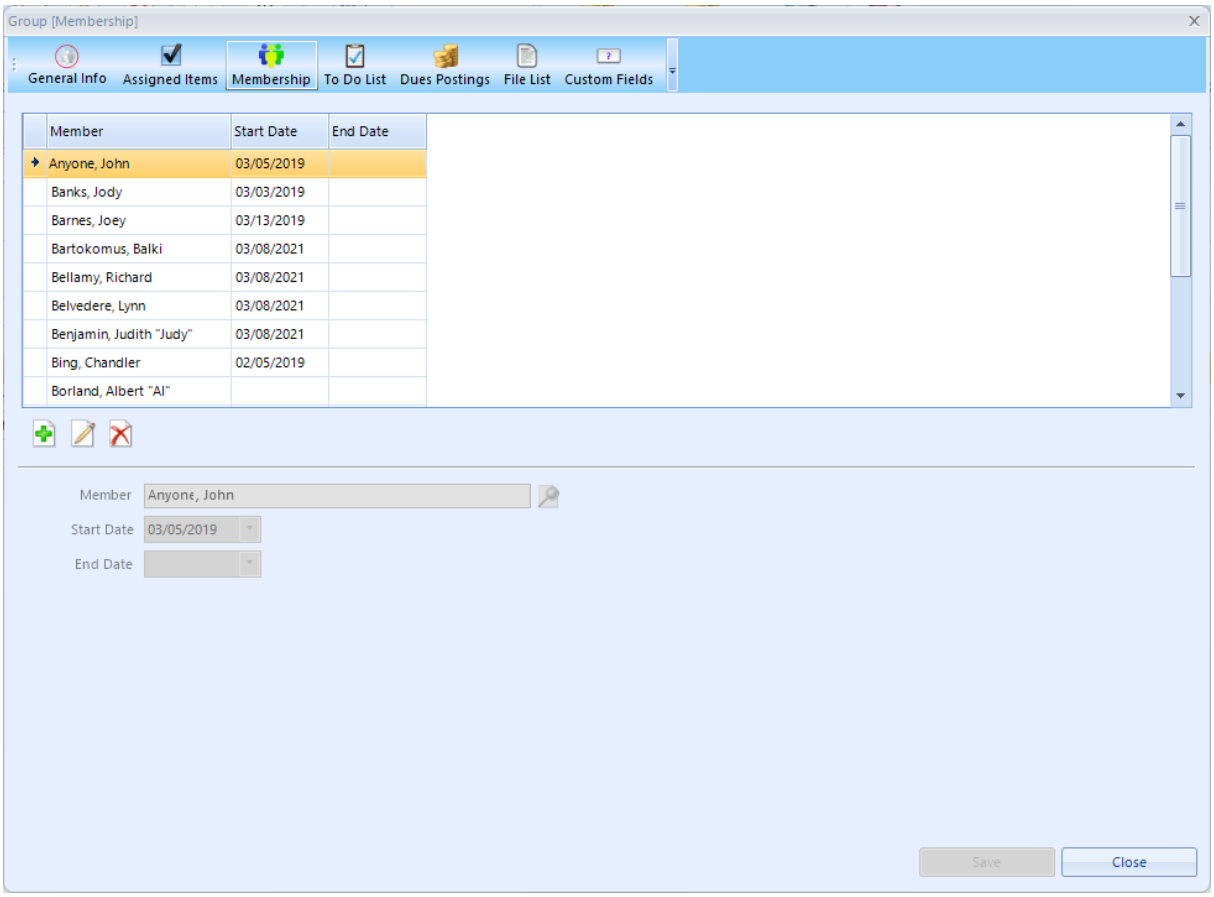
13.6.4 Membership Page

You can assign any subset of your membership to any group.

Note: This help topic explains how to add members from the Group record itself. You may also add multiple members to a group directly from the Membership List. See Adding Members to a Group for details

This page provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

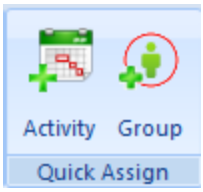
To create a new record, click Add; or, select an existing record and click Edit, Copy, or Delete.



The following fields are available:

- Member - the member assigned to the group. Use the Search icon to the right of the field to select an existing member.

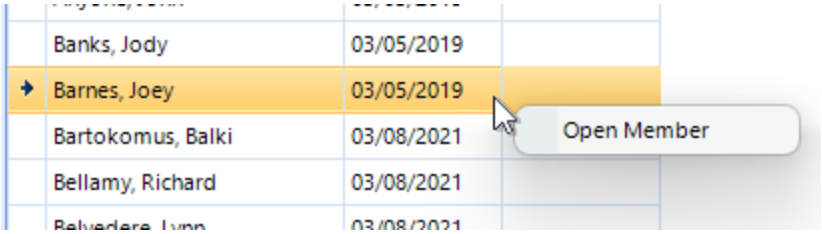
  Note: You can quickly add multiple members to a group by selecting them on the Membership List and using the Group quick assign button. See Adding Members to a Group for details



- Start Date - an optional begin date for the group membership
- End Date - an optional end date for the group membership

Opening a Member

You can quickly open a member from the list by choosing "Open Member" from the right-click context menu.

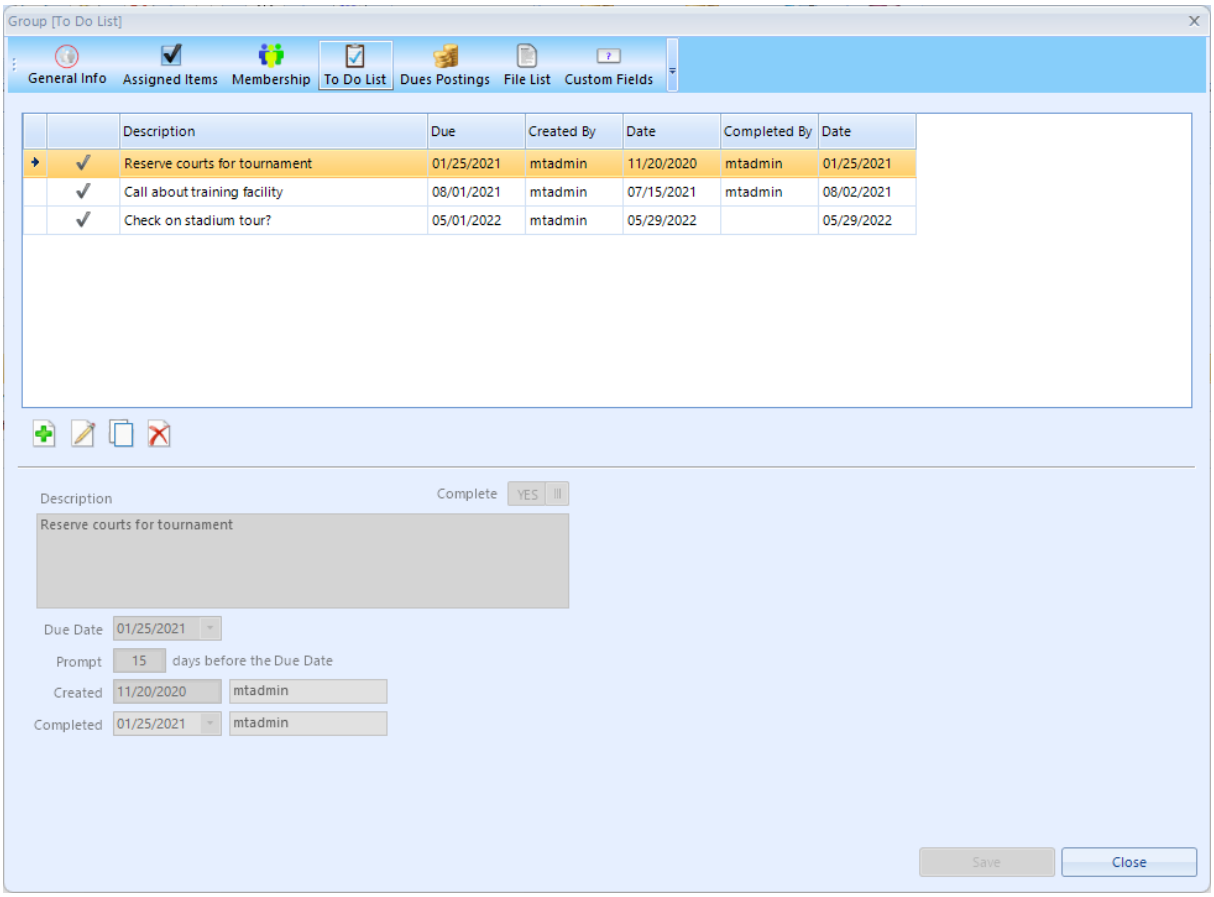


13.6.5 To Do List Page

To-Do lists enable you to track anything you need "to do" related to a group.

This page provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

To create a new record, click Add; or, select an existing record and click Edit, Copy, or Delete.



The following fields are available:

- Description - the thing "to do"
- Complete - indicates the item has been completed. Turning this on will automatically set the Completed Date to the current date.
- Due Date - the date the item will appear on the To Do list that displays at log in (assuming the Prompt days is left as zero)
- Prompt N days before the Due Date - causes the item to appear on the To Do list that displays at log in the specified number of days before the Due Date
- Created Date/By - the date and user name of the user who first added the To Do item
- Completed Date/By - the date and user name of the user who completed the To Do item. Note that the date can be modified if necessary (for example, if you forget to go in and mark an item completed for a couple days after the actual due date)

13.6.6 Dues Postings Page

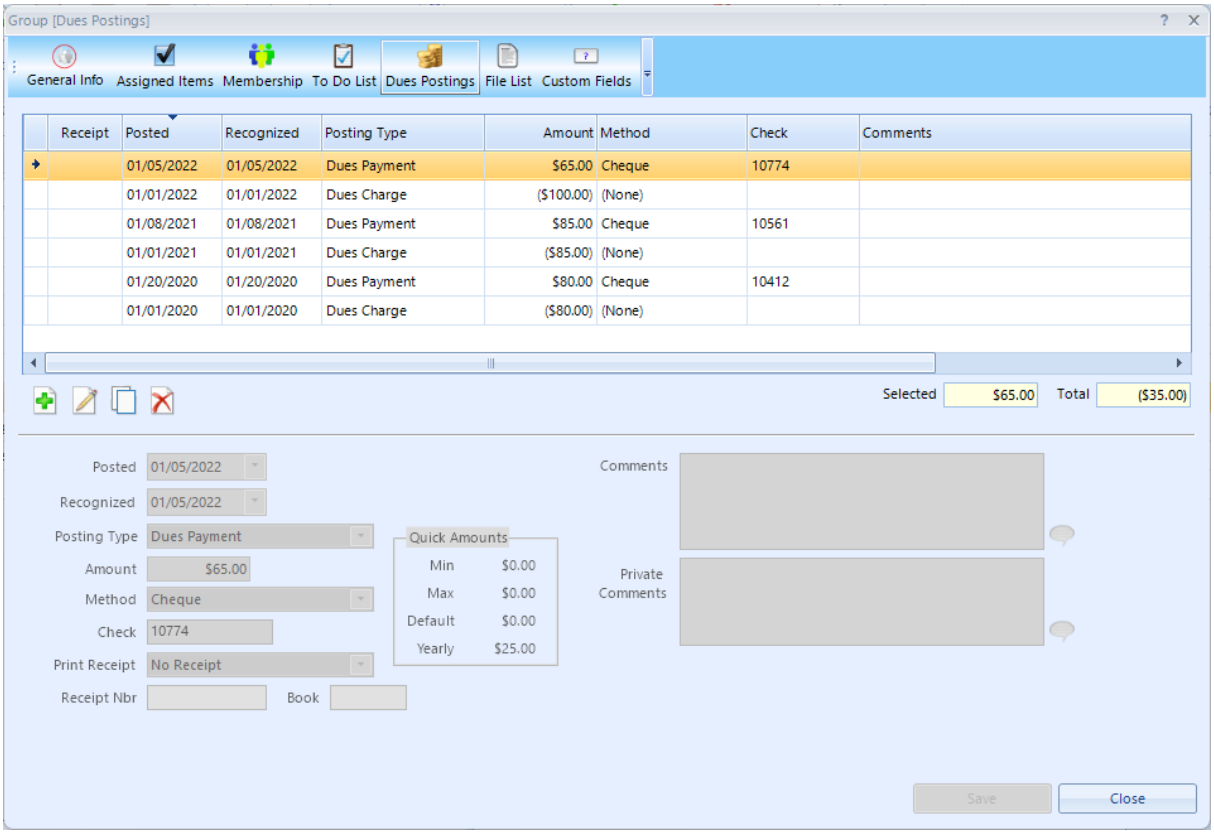
Postings are generally only used with members and activities, but they are available for Groups as well. Some organizations create a group that represents the "organization itself" and use it as a kind of checkbook for the main organization account.

This page provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

The two fields below the list quickly show balances:

- Selected - sums all selected rows
- Total - sums all rows, selected or not

To create a new record, click Add; or, select an existing record and click Edit, Copy, or Delete.



The following fields are available:

- Posted - the date on which the entry is being recorded
- Recognized - the date on which you want the amount to apply to your organization. Since most activities tend to start and end in a short time period, the date recognized

will normally be the same as the date posted. But if you need to prepare for an activity during the latter part of one year but actually account for it the following year, you can use the date recognized to identify these entries. That way, a report run for the first quarter of next year will show an entry that was actually posted the year before.

- Posting Type - the posting type to be applied to this entry

  Note: The posting type will be defaulted to the default Group posting type specified in the Posting Types list, if available. If no default has been set, the type will be blank. See Maintaining Posting Types for more information.

- Amount - The amount to be recorded. Only positive numbers may be used. The posting type determines whether the amount is applied as a debit or credit to the account.

  Note: The Quick Amounts section shows any minimum, maximum, or default amount defined for the selected posting type. These amounts can be quickly entered by clicking the amount.

- Method - the payment method used. See Maintaining Payment Methods for more information.

- Check - the cheque number or other payment identifier

- Print Receipt -controls when a receipt should be printed for the entry:

  - No Receipt - indicates that no receipt needs to be printed at all

  - Mark for Printing - indicates that the record should be marked so that you can run a receipt report from the Reports window, and use Print Receipt as part of your report criteria to print all marked receipts at once.

  - Print on Save - indicates that a receipt will be automatically printed when the OK button is clicked to save the entry. Note that the system will automatically switch the setting to "No Receipt" after printing.

- Receipt Nbr/Book - these fields are enabled whenever the selected posting type is one that has been defined to generate a receipt number. The fields are disabled for all other posting types. The Receipt Number is a sequential number generated by the system. The Receipt Book is the value set in preferences.

  Note: The receipt number is not automatically generated until the record is saved or a Receipt is printed via the Receipt button. This ensures that the next receipt number is not used until it is needed.

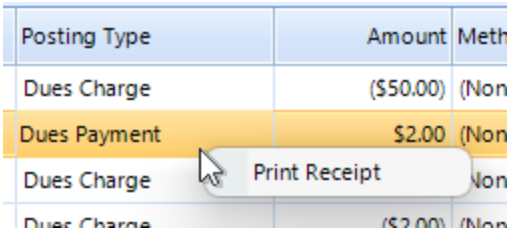
  Note: if the receipt icon is displayed next to the Book field, it enables you to force the system to generate the next receipt number immediately. Note that once a receipt number has been generated, it is "used" permanently, even if you choose not to save the entry. The only way to reset it is via the Receipt Book Numbers preference. If you want to "regenerate" a new number for an entry that already has a receipt number, you

must clear the field first, then click Assign Now to generate a new number. If you do not want the Assign Now option to be available at all, it can be turned off via the Display Assign Now preference.

- Comments - general comments about the entry
- Private Comments - comments that will not appear on any system report

Additional Dues Capabilities

- If the posting uses a Posting Type that can generate a receipt, you can right-click the entry in the list to print the receipt directly.



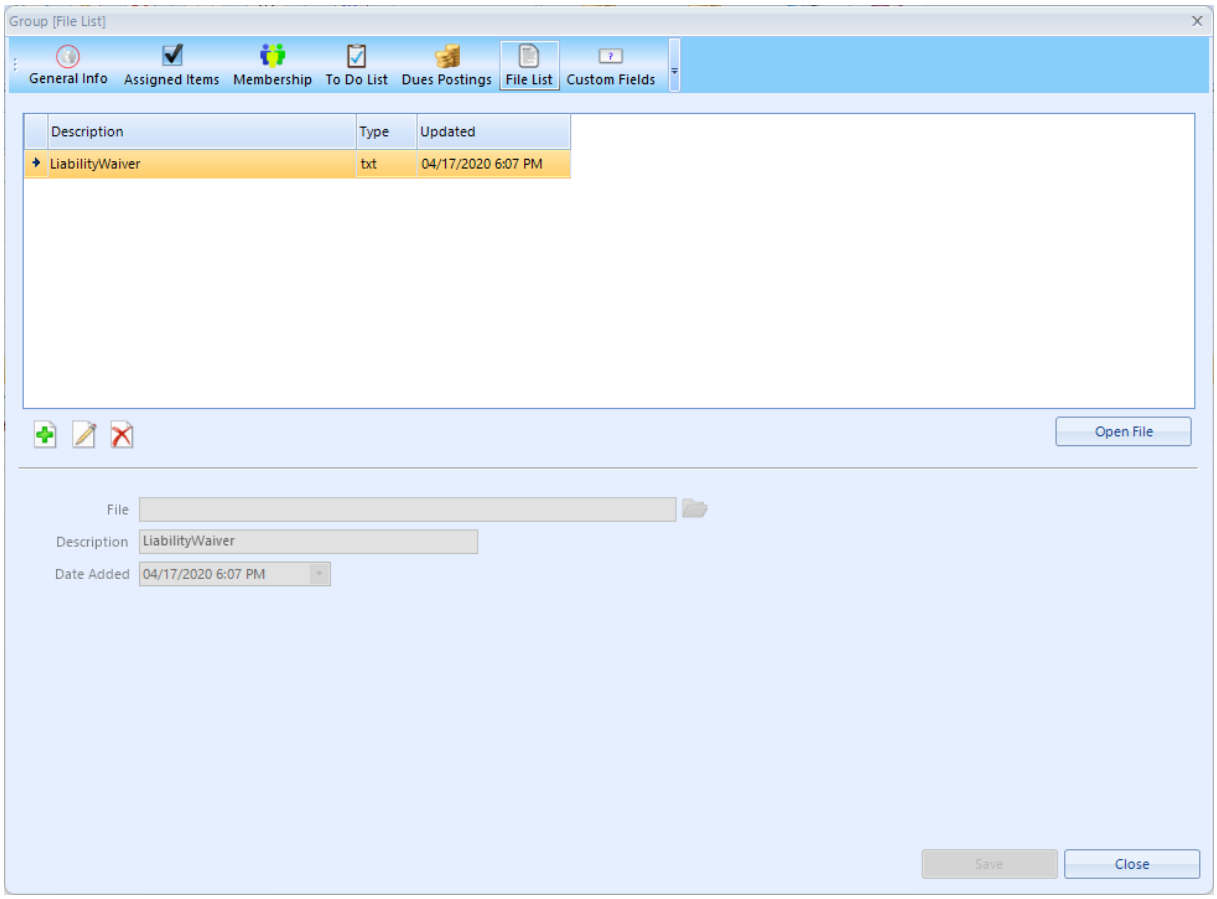
13.6.7 File List Page

You can link one or more files to a group. This is convenient for things like ledgers, notes, maps, or any other file stored on your PC.

Note: Any file stored on your computer can be associated with the record. The file is either stored as a link to the physical file, or stored in the database, depending on the File & Photo Storage database preference. If you are storing files and photos in the database, be sure to keep file sizes as small as possible to avoid dramatically increasing the database size.

This page provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

To create a new record, click Add; or, select an existing record and click Edit, or Delete.



The following fields are available:

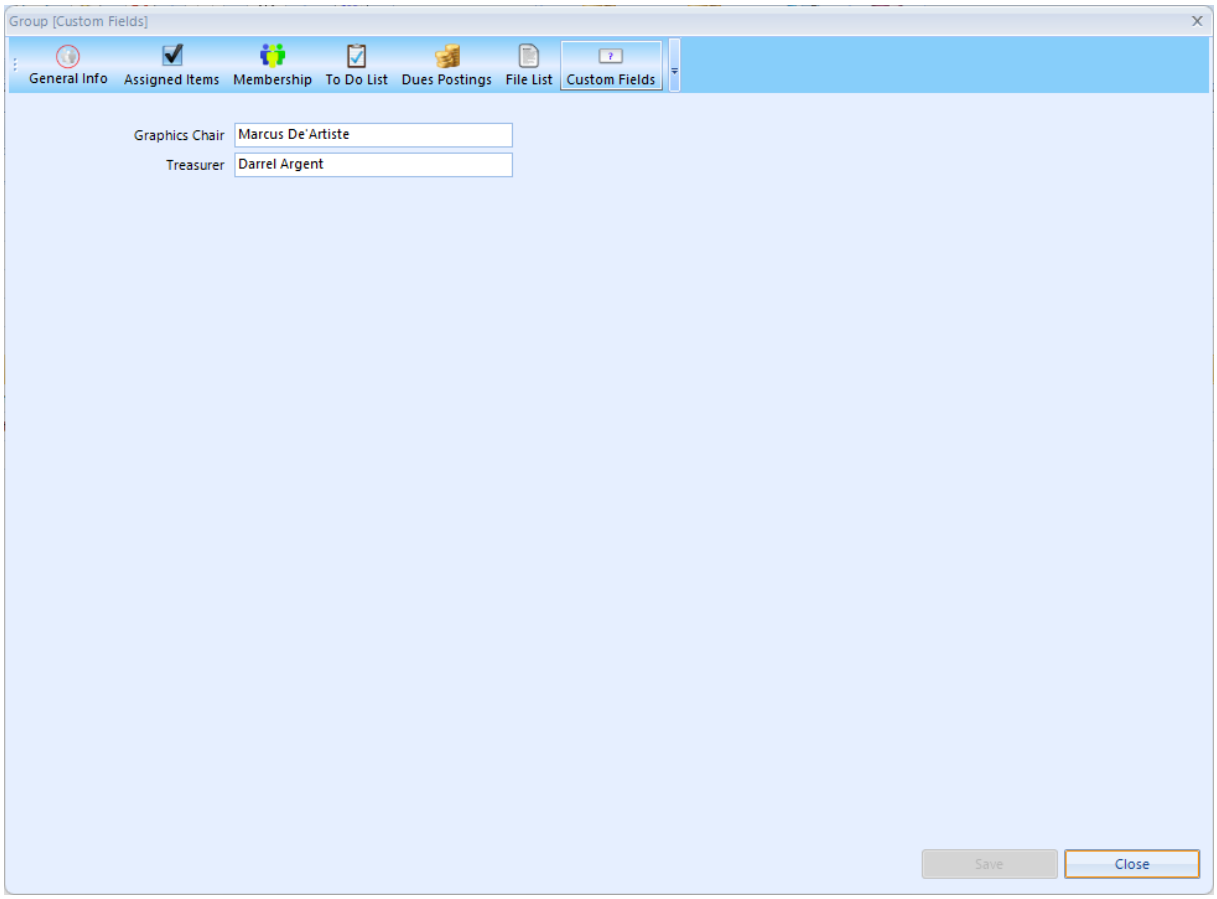
- File - click the folder icon to the right of the field to select a file from your computer or network. After selecting, the system will try to use the file name as the description, and the full path will appear in the field.
- Description - you can keep the suggested name or enter your own description for the file
- Date Added - defaults to the current date, but can be changed.

When you save your changes, the system checks your File and Photo Storage preference. If the preference is set to store the file in the database, the file size is checked against the limit set in the preference, and if acceptable, the file is converted, stored and "(Database)" displays as the new file name to indicate the storage location. If the preference is set to keep the file on your computer, the full path will remain.

Note: If a record is deleted from the File List it will not affect a physical file located on your computer. The deletion only removes the database record.

13.6.8 Custom Fields Page

Custom fields can be used for nearly any sort of data you wish, and they can be customized to become lists, editable lists, switches, currency, dates, and ordinary text fields.



You can create up to 50 custom fields, and you can choose where and how they will be used and displayed. This example shows simple text fields, and they're actually at the top of the first of two possible "columns" of custom fields. If you actually define all 50 fields, a scroll bar will also appear so you can get to them all.

See Maintaining Custom Fields for information about adding or changing custom fields.

Part XIV

Importing Data

14 Importing Data

14.1 Importing Data

Several types of data can be imported into the database from a delimited text file. "Delimited" means that each "chunk" or field of data is separated from the previous chunk by a character of some kind. The best formats are called "tab-delimited" (often with a .txt extension) and "comma-delimited" (often with a .csv extension).

You can usually look at the data to tell how it has been saved. The file should be plain text (if you see funny black or white squares in the text -- remove them).

Tab-delimited data is often better, because you may have legitimate commas within the text of a field, and these commas could confuse the import engine into thinking a new field has been started.

For example, tab-delimited data might look like this:

John Smith Anytown PA 75074 United States

But comma-delimited data would look like this:

John,Smith,Anytown,PA,75074,United States

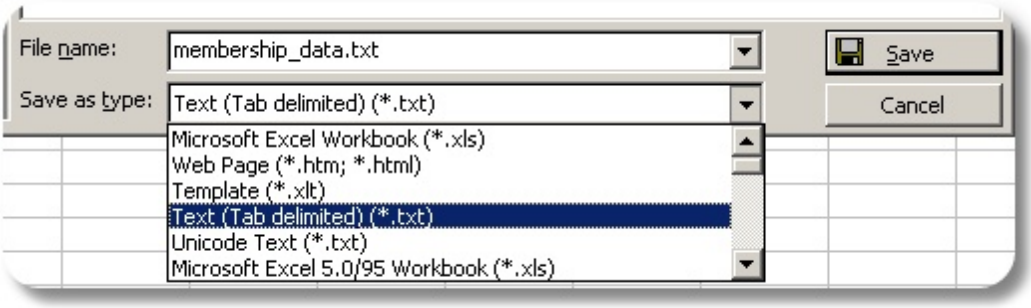
The first rule to remember about importing data is that if the data you are importing is not consistent, you will probably have trouble getting a clean import. The better the data coming in, the less cleanup you'll have to do afterward. Sometimes it is a good idea to open your entire data file in something like Microsoft Excel, so you can view all the rows and columns of data at once. Scan through it and look for inconsistencies, stray characters, missing data, names with new-line or carriage returns in them, etc. Clean it up as best you can, then save the data to text again.

It is also important to remember that the system assumes the record being imported is the way you want it to be. The only data that is automatically added if not found is for fields that are required in the system. A good example is the Start Date. There is a preference to default the start date to the current date or some specific date, but it does not apply to imports because the Start Date is not required.

Importing from an Excel File

Before you can import data from an Excel file, you must first convert it to a plain text file. This is done from within Excel itself, as follows:

1. Open the file in Excel.
2. Choose File > Save As.
3. Depending on your version of Excel, there should be an option at the bottom of the Save As window to set the File Type. Choose "Text (Tab Delimited)" as shown below:



4. Now the data is in a format that can be imported.

Blank Rows

Make sure your import file doesn't have any blank lines in it. The import may stop when it finds the blank row, thinking it has reached the last record in the file.

Updates vs New Records (Membership Data Only)

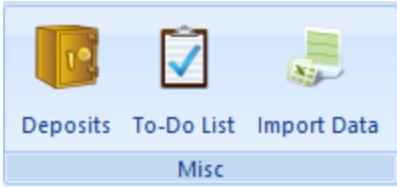
When you import data, the system will make a decision as to whether the data is new, or an update to an existing record. This is done by looking for the Member ID field in your import map file. If you are importing a Member ID, the system will check the database for a matching Member ID on an existing record. If found, data will be used to update the existing record rather than create a new record.

If the data for a field being imported is blank, the system ignores it and does not change the membership record being updated. However, if you really **want** to import blank data to clear existing data in a field, import the text `=CLEAR` (that's an equal sign followed by the word 'clear' with no spaces). The system will respond by clearing any existing data in the target field.

Note: It is a good idea to verify the available State/Province, Country, Phone Type, and Status codes before attempting an import if your data needs to match these values. Each of these code lists are available via the Home ribbon > Lists window. This is important, because if you import a status called, "Family" and do not have a status in the system by that name, the default status will be used -- possibly generating incorrect data.

Importing Data

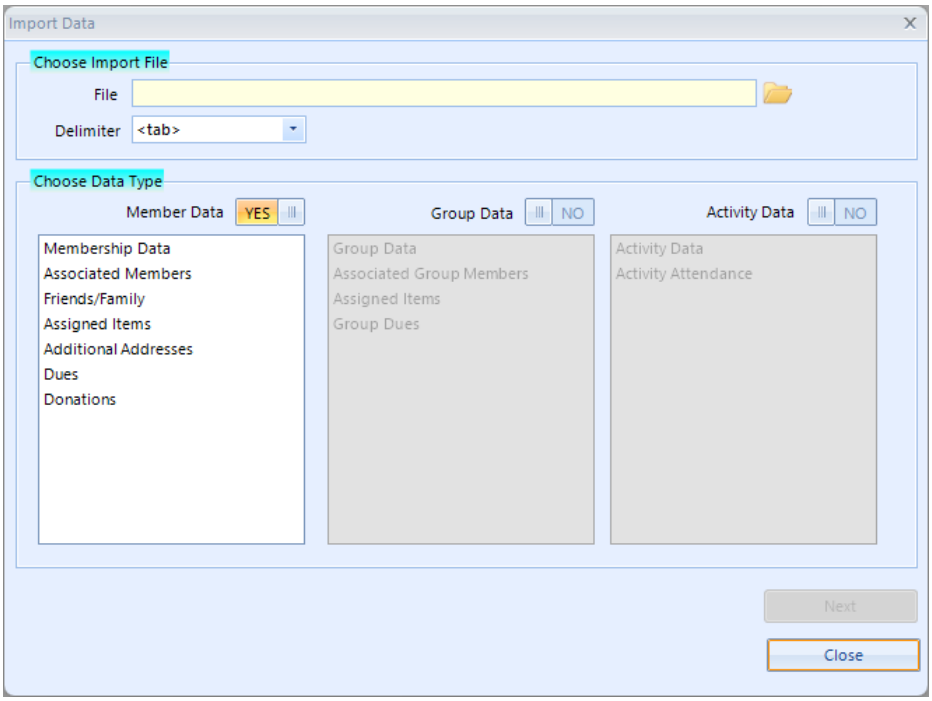
1. On the Home ribbon, choose Import Data from the Misc section.



2. When the window opens, it is divided into two sections. In the Choose Import File box, the File field lets you choose the text file containing your data. Click the browse icon to

the right of the field and select your file, then choose the appropriate Delimiter for your data.

Note: If you receive an error that the file is in use or otherwise cannot be opened, make sure you don't still have it open in Excel, or some other program that was used to create or view the file.



3. Specify the primary type of data you are importing (Member, Group, or Activity). This will enable the sub-category list so you can be more specific. These choices will determine the fields available for import and also which, if any, fields are required to be part of your import file.

Member Data choices

- **Membership Data** - enables you to import new, or update existing, membership records, including General, Status, and Custom data.
- **Associated Members** - enables you to import member-to-member relationships, including the Association Type, date, and comment. The following fields are required in the import file:

  Member ID - Must be an ID that matches an existing membership record.

  Associated Member ID - Must be an ID that matches an another membership record.

- **Friends/Family** - enables you to import friend/family records to existing membership records. The following fields are required in the import file:

  Member ID - Must be an ID that matches an existing membership record.

  First Name - The first name of the person being added

  Last Name - The last name of the person being added

- **Assigned Items** - enables you to import assigned item data. The following fields are required in the import file:

  Member ID - Must be an ID that matches an existing membership record.

  Assigned Category Name - Must be the name of an existing Group item category.

  Assigned Item Name - Must be the name of an existing item under the specified category.

- **Additional Addresses*** - enables you to import additional (non-current) addresses to existing membership records. The following fields are required in the import file:

  Member ID - Must be an ID that matches an existing membership record.

  Address Type - The address type to use for the new address record. Be sure the address type you import actually exists.

  Country - The country on the address. This can be a country name or code, i.e., "United States" or "USA" that exists in the list of current country codes.

- **Dues*** - enables you to import dues entries to existing membership records. The following fields are required in the import file:

  Member ID - Must be an ID that matches an existing membership record.

  Date Posted - The date for the dues entry

  Amount Posted - This will be set to 0.00 if not provided

  Posting Type - Must be a posting type in the format, "Dues Charge (D)", i.e., the posting type name, followed by a D or C (debit or credit) in parenthesis, just like it appears on the list on a membership record.

- **Donations*** - enables you to import donation entries to existing membership records. The following fields are required in the import file:

  Member ID - Must be an ID that matches an existing membership record.

  Date Posted - The date for the dues entry

Amount Posted - This will be set to 0.00 if not provided

Posting Type - Must be a posting type in the format, "Donation (C)", i.e., the posting type name, followed by a D or C (debit or credit) in parenthesis, just like it appears on the list on a membership record.

Group Data choices

- **Group Data** - enables you to import a new Group record, including any field on the General and Custom tabs of the group record.
- **Associated Group Members** - enables you to import new member-to-group relationships. The following fields are required in the import file:

  Member ID - Must be an ID that matches an existing membership record.

  Group Name - Must be a name that matches an existing group record.
- **Assigned Items** - enables you to import new assigned item data. The following fields are required in the import file:

  Group Name - Must be a name that matches an existing group record.

  Assigned Category Name - Must be the name of an existing Group item category.

  Assigned Item Name - Must be the name of an existing item under the specified category.

Activity Data choices

- **Activity Data** - enables you to import a new activity. The following fields are required in the import file:

  Activity Name - The name for the activity

  Activity Location - The name of an existing activity location.
- **Activity Attendance*** - enables you to import attendance (and associated postings) for an existing activity. The following fields are required in the import file:

  Activity Name - Must be the name of an existing Activity.

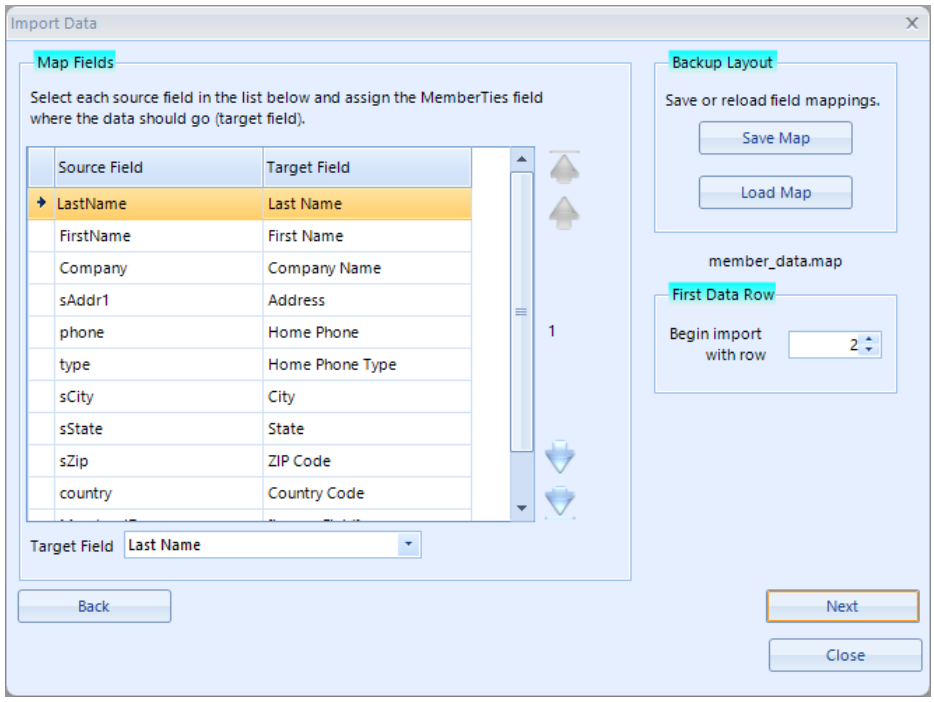
  Member ID - Must be an ID that matches an existing membership record.

  If posting data is imported as well, the following additional fields are required:

  Posting Type - Must be a posting type in the format, "Activity Income (C)", i.e., the posting type name, followed by a D or C (debit or credit) in parenthesis, just like it appears on the list on an activity record.

Note: If the import results in an activity now having more attendees than the specified activity capacity, a notice will be displayed in the results area. The system will always import all records regardless of capacity.

4. Click Next



5. Data will be read from your file held for display as sample data in the "Map Fields" section. You can page through this data one record at a time using the arrows next to the list. Depending on whether your data has a header row or not (i.e., the first row contains the field names), you will either see headers or your first line of data.

   Note: The system automatically looks for a saved map file with the same name as your import file. i.e., if your import file is **mydata**.txt, the system looks for mydata.**map** in the same location. If found, it is loaded automatically.

   Note: If you see a blank line and have to click the down-arrow a couple of times to get to the data, you need to fix your import file. Blank lines in an import file can cause the import to stop prematurely, so you should remove them. The first line of data should either be headers or actual data.

6. This page enables you to specify a target field for each piece of data you are importing. Click each row in the grid, and choose the Target Field from the list below. In the example above, we're showing row 2 of the data (the first row of actual data), and have selected "Last Name" as the Target Field for the first field that contains "Smith" as data. For each row, you must select to either:

- Ignore it - If you don't want to import data for this field for some reason, either leave the target blank, or choose "[Ignore Field]"
- Map to a Specific Field - If the field contains data that belongs in a specific field, such as "last name", you can simply select the specific target field (i.e., "Last Name")
- Split Data to Two Fields - A split is needed when your field contains combined data like, "Smith, John". In this case, you don't want to move the contents to either the Last Name field or the First Name field; you want to divide it between them. In this case, you would select "[Split First-Last Name]" and then specify which part of the split comes first. Splits are available for dividing a Name, or a Work phone number/extension. If you have other combined fields, you will need to modify your data to separate them into their own columns.

Note: If you are importing data to custom fields, you must set up your custom fields first so they are defined for the proper kind of data. All existing custom fields will appear in the Target Field list. When creating the custom fields, remember to mark them as available for imports! Also, a custom field defined as a checkbox will recognize import values of Y/N, Yes/No, True/False, On/Off, and 1/0.

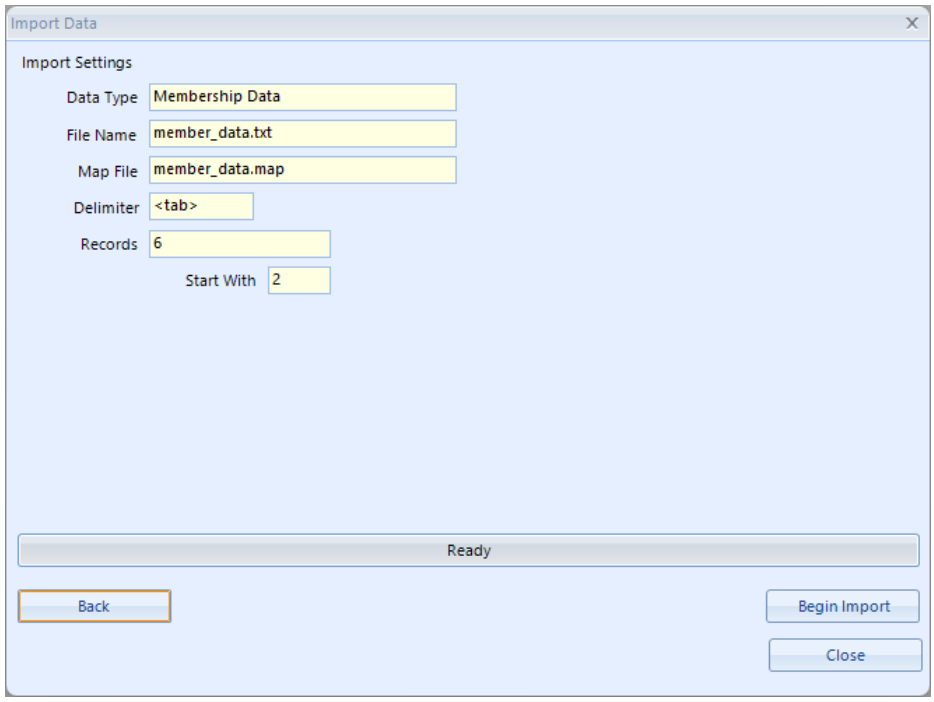
Note: Some things are required by the database, and have to be imported in order to have a valid record to save. For example, every record has a Country, every phone number has a Phone Type, etc. If your import file does not include this data, the default set on your database will be used. All of the default values can be verified on their respective lists via Home ribbon > Lists.

7. The "Backup Layout area enables you to save your work and reload it later. Creating a correct map can be time-consuming. You can save your work at any time by choosing "Save Map." Once saved, you can reload it at any time. (This can really help if your first import map doesn't work and you need to adjust it.)

   Note: You should save your map file with the same name as your import file, but with the .map extension. That way the system will automatically find and reload it whenever you open the same import file.

8. The "First Data Row" area is used to specify which row is the first row of "real" data in your file. For example, if your import file begins with a row of column headings (which is very common), you would want to start the import with row 2, not 1.

9. When you're ready to import, click Next.



10. Review the Import Settings and if everything looks good, click Begin Import. The system begin the process of moving all of your data to the database.

11. If any errors or warnings occur, they will be written to a log file and a message will offer to open the file for review. The log file will always be saved to your Documents\MemberTies\Logs folder.

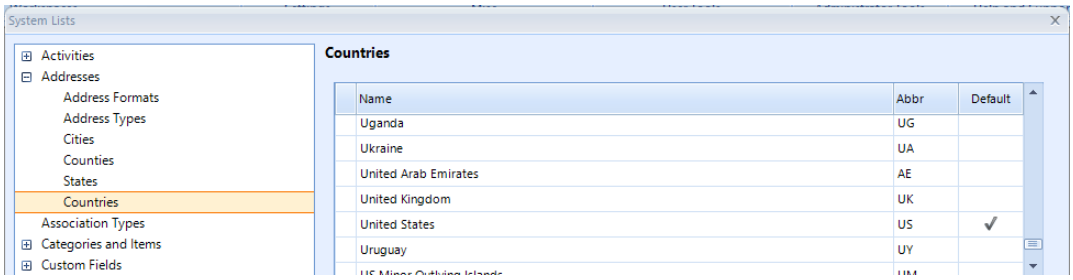
    Here is an example of an import file showing an error:

```
Reading file member_data.txt
File contains 6 records.
Import will start at row: 2
Import is limited to 19 records because the software is not registered.

Row: 1 - Skipped

Row: 2 - Processing as New
Row: 2 - HomePhoneType list record found for "Normal."
Row: 2 - City list record found for "Dallas."
Row: 2 - State list record found for "Texas."
Row: 2 - [WARNING] No matching Country list record found for the value "USA". This is a required field.
Total records processed: 5
```

    In this example, we used "USA" as the country, but if we look in the Country list, the code for USA is actually "US", which explains why it was not found. Since the Country is a required field, the record was skipped. We just need to update our import file and use "US" as the country (or United States) and it will work.

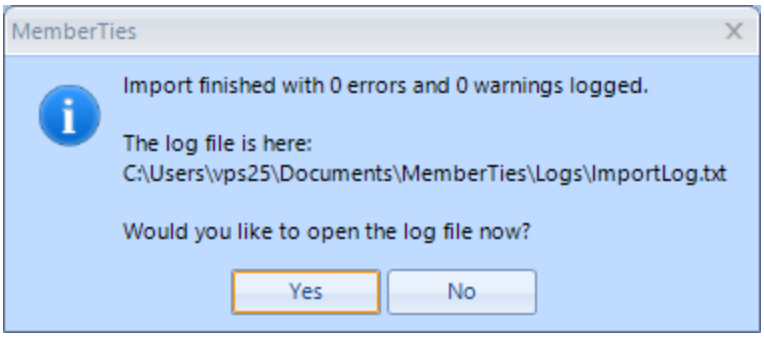


Other common errors that may be reported include:

- A member ID was not found when importing a secondary address, so the data couldn't be linked to an existing record and imported.
- Invalid data, such as mapping a phone number to a birth date field, or something similar.

The error messages should be fairly self explanatory, and will include the row number in question so you can find the original data.

12. If the import is successful, a message similar to the following will display:



13. Choose Yes or No as desired. When you return to the Import Data window, the "Begin Import" button will be disabled because the import process has completed.
14. Click Close and verify the data within the system. If you find problems, you can delete all the imported data, modify your map or data, and try again.

* Professional Version Only

Part XV

Membership Records

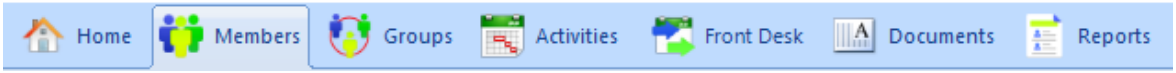
15 Membership Records

15.1 Membership List Overview

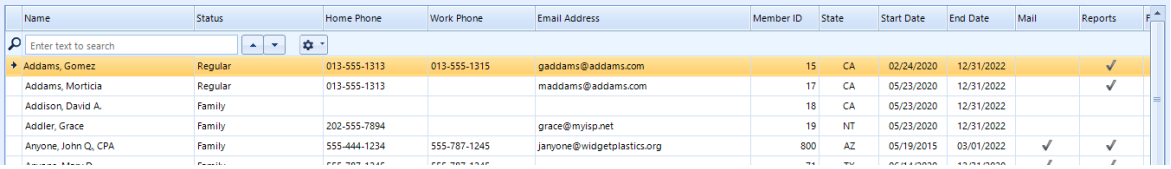
A membership record represents a person relevant to your organization. Despite the name, "membership record," the record does not necessarily have to represent an actual "member" in terms of a class of membership. In other words, a prospective member, as well as a "person who gets our newsletters," is a candidate for a membership record.

Opening the Membership List

1. To open to the Membership List, choose the Members tab from the ribbon bar.



2. The Membership List will display.



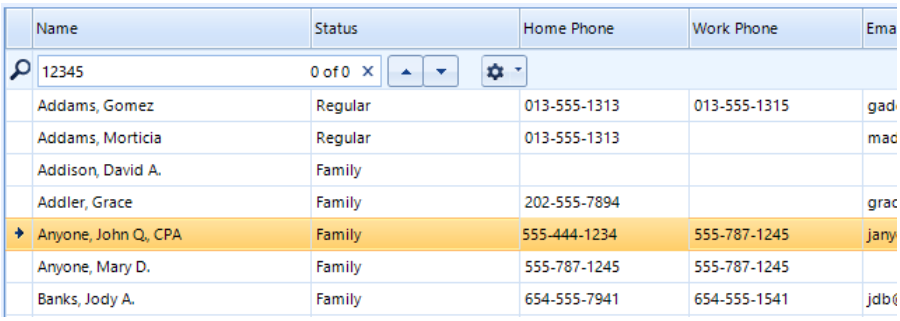
Name	Status	Home Phone	Work Phone	Email Address	Member ID	State	Start Date	End Date	Mail	Reports
Enter text to search										
Addams, Gomez	Regular	013-555-1313	013-555-1315	gaddams@addams.com	15	CA	02/24/2020	12/31/2022		✓
Addams, Morticia	Regular	013-555-1313		maddams@addams.com	17	CA	05/23/2020	12/31/2022		✓
Addison, David A.	Family				18	CA	05/23/2020	12/31/2022		
Addler, Grace	Family	202-555-7894		grace@myisp.net	19	NT	05/23/2020	12/31/2022		
Anyone, John Q., CPA	Family	555-444-1234	555-787-1245	janyone@widgetplastics.org	800	AZ	05/19/2015	03/01/2022	✓	✓

If you're not familiar with selecting records in lists, please see this topic on how to select records from lists in Windows.

Finding a Record in the List

When the list is displayed, you can quickly find a record by typing in the search field at the top of the list. Press CTRL+F or click in the search field to activate it. Any text typed in the field will be sought throughout data displayed in the list.

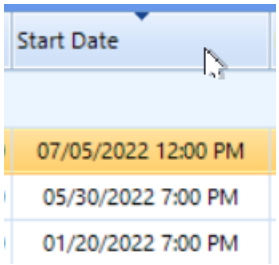
Note: A membership preference controls whether the field is activated automatically when the list is refreshed.



Name	Status	Home Phone	Work Phone	Ema
12345	0 of 0			
Addams, Gomez	Regular	013-555-1313	013-555-1315	gad
Addams, Morticia	Regular	013-555-1313		mac
Addison, David A.	Family			
Addler, Grace	Family	202-555-7894		grac
Anyone, John Q., CPA	Family	555-444-1234	555-787-1245	jany
Anyone, Mary D.	Family	555-787-1245	555-787-1245	
Banks, Jody A.	Family	654-555-7941	654-555-1541	jdb@

Changing the Sort

Click the column heading of any column to sort the list by that column. The following example shows a date column being sorted in descending order, so the most recent dates are at the top.



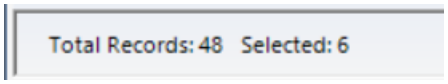
The first click will sort the column in ascending order, the second click will sort the column in descending order,and a small arrow icon will indicate the current sort direction.

Widening a Column

If you need to read especially long entries, just position your mouse pointer between the column headings until the cursor changes to a double-headed arrow, then drag the column to the size you want.

Refreshing the Data

When you add a record or change data on the list, the system will try to refresh the modified row so that you see the change immediately. If the change doesn't appear for some reason, you can press F5 or click the Refresh button on the ribbon to re-retrieve data from the database. Note that the number of records shown on the list, and the current number of selected rows is always displayed in the status area below the list.



Exporting Data

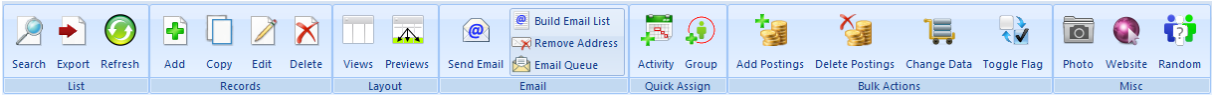
You can easily export (save) data from the view in various formats, including PDF for easy printing. See Exporting Data for details.

Working with Records

The ribbon bar provides access to everything related to the list records.

15.2 Member Ribbon Bar

The ribbon enables you to access all functionality that isn't specific to a single record (for which you would need to open a record from the list). The available icons may vary based on standard vs professional version, and security settings.



The general use of each button is described below. Click any option to go to the help for that area.

- Search - open the search window to change find specific records for the list
- Export - save the list data to a PDF file or other format
- Refresh - re-retrieve the list data from the database
- Add - or press CTRL+N to create a new record
- Edit - or press CTRL+Enter to open the selected record for editing
- Copy - or press CTRL+D to duplicate the selected record
- Delete - or press CTRL+DEL to delete the selected records
- Views* - choose or create a different layout of columns for the list
- Previews* - choose one or more blocks of data to display below the list
- Send Email* - send email to the selected records
- Build Email List - export a list of email addresses from the selected records
- Remove Email Address - automatically find and remove an email address from any record containing it (this is not restricted to the Group list)
- Email Queue* - display the list of emails currently queued to be sent (this is not restricted to the Group list)
- Activity - assign one or more members to an activity
- Group - assign one or more members to a group
- Add Postings* - add a posting to all selected records
- Delete Postings* - delete postings from records based on criteria
- Change Data - update multiple fields on multiple members at once

- Toggle Flag - update the Include in Mailings or Auto-Relate flag on all selected records
- Photo - display the photo assigned to the member (if any)
- Website - open the your default web browser to the website on the record
- Random - chooses a subset of random members from the current membership list (such as for a prize drawing)

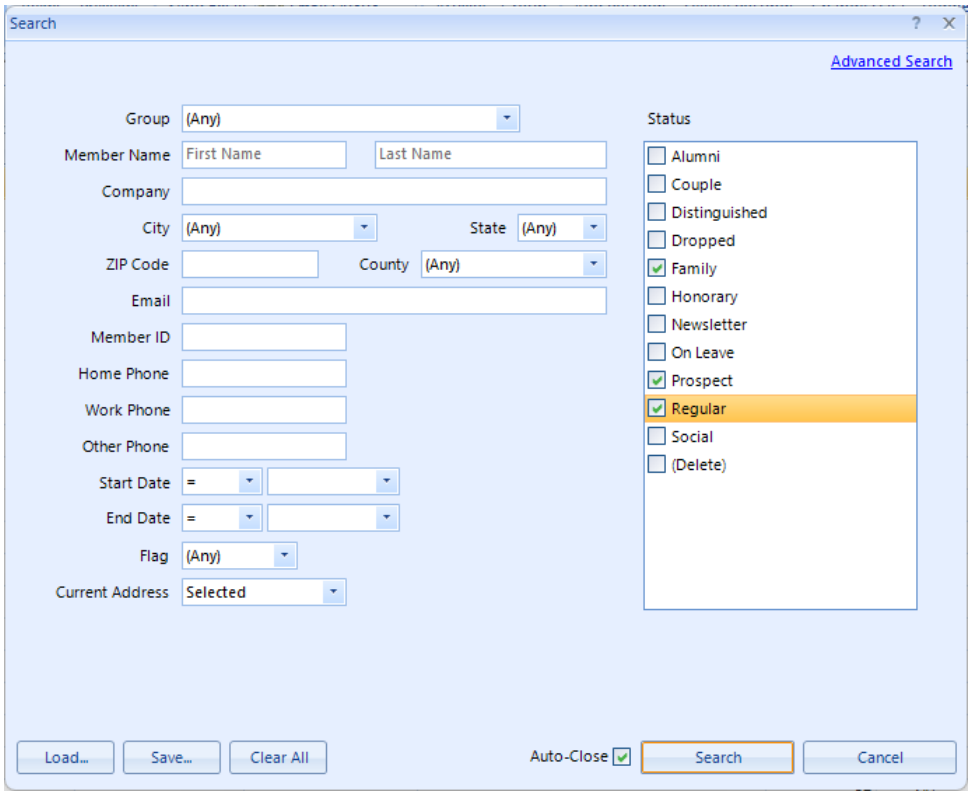
*Professional version only

15.3 Searching for Records

The search function enables you to search for a subset of records to display on the list. If you only have a few dozen records, this may never even be necessary,but after a few hundred members are in the list the search will become very useful.

Searching for Records

1. On the Members ribbon, choose Search.



See the Search Overview for more details about using the Search window.

2. Enter your search criteria or choose Load to reload a previously saved search.

   Note: The search window always opens with the Basic search layout. You should think of a basic search as a "this and this and this" style of query. In other words, i the example above we selected "*dinner*" for the activity name (meaning the name has to include the word "dinner" somewhere) and chose Location Type = "Hotel/Motel". So the search essentially find all dinners held at hotels, but not dinners held anywhere else. So if an activity is called "Monthly Dinner" but the location type is "Beach", it will not be found.

   If you would rather create a more complex advanced search, click Advanced Search in the upper right to change the layout.

   See the search overview for complete details about using basic and advanced searches.

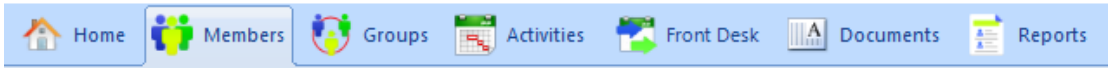
3. When you have entered or loaded your search criteria, click Search. The results will appear on the list behind the window, and if it looks good, you can close the window. (If the Auto-Close box was ticked before you clicked Search, the window will close automatically.)

15.4 Copying a Member

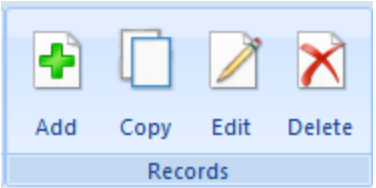
When copying a member from the Membership List, a few options are available to control how much of the record is actually duplicated.

To Copy a Member

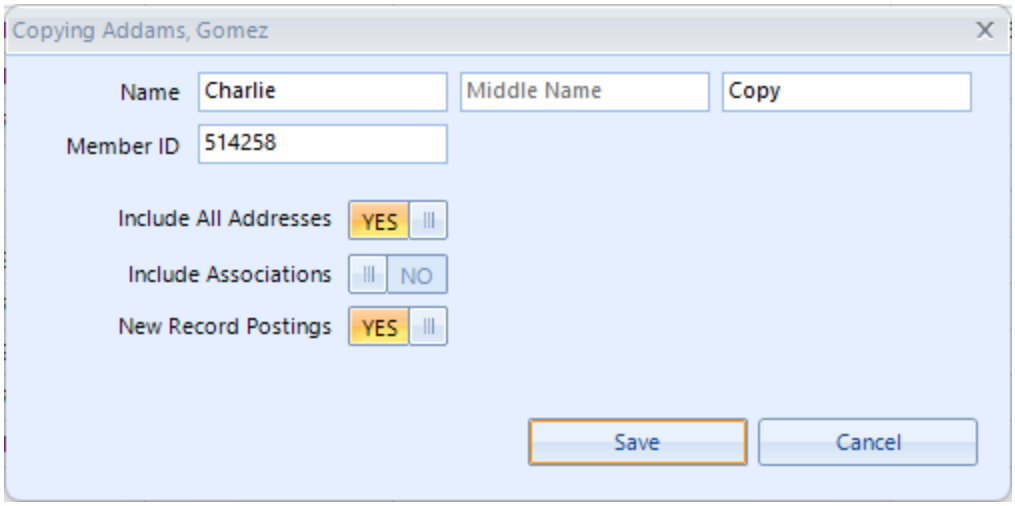
1. Choose the Members tab from the ribbon bar.



2. In the Records section of the ribbon choose Copy.



3. The Copy window will open so you can set the new name and options:



4. The following fields are available:

   - New Name - the first/middle/last name for the new member
   - Member ID - the member ID for the new member
   - Include All Addresses - controls whether non-active addresses of the existing member are copied. If this is off, only the active address is copied.
   - Include Associations - controls whether all associated members are associated to the new member
   - New Record Postings - controls whether to apply any "On New Record Save" postings tied to the status being copied to the new record

5. When ready to copy, click Save.

15.5 About Member IDs

The Member ID field, specifically the way it is populated, is a frequent source of confusion. The goal of this topic is strictly informational -- to explain what the field is for, how it is populated, and why it looks odd sometimes.

Some Basic Facts

1 The Member ID is a required field, and it must be unique. You can put anything you like into this field, but by default the system will assign a unique number to the field that matches the internal id of the membership record. This is done simply to save you the trouble of deciding on a unique value if you don't care about the contents of the field.

2 The internal system ID is a "database sequence." A sequence is essentially a running counter that is maintained internally by the database engine. It never "backs up" and

there is no "undo" button. Every time a new record is created and saved, the database increments the appropriate counter and assigns that value. The next time a new ID is needed, it will increment the number again. If you subsequently delete the record, the system does not "re-use" the number.

3 Because internal ID numbers are just dumb counters, they cannot be relied on as a means to determine how many members are in the system. To get an accurate count of members, you should use statistics reports, or simply look at the total records on the Membership List after querying for all records.

What Causes Confusion?

Suppose you add 10 members one after another in a new database. Their internal IDs will be 1 - 10. Likewise, the defaulted member ID numbers will be 1 - 10. At this point everything looks good.

Now let's say you realize that member number 5 actually never joined, and shouldn't even be in the database. Thus, you delete that member. Now the problems begin...

When you add another member, what should the system do? There are currently 9 records, lowest ID is 1, highest ID is 10. Should the system:

- Assign the number 11 to the new record, because that's the number immediately following the largest ID? Ok, but there really aren't 11 members, there are only 10.
- Assign the number 10, because there are currently only 9 members, and this is the 10th? Ok, but that would mean there are now two number 10s in the database, which is wrong.
- Reassign number 5, because it's an empty slot? Ok, now the count matches the actual number of members, but number 5 really didn't come before number 6, it came after number 10. Now the sequence doesn't make sense anymore. This gets even more complicated if you delete two or three members.

The Solution

The only logical solution was to leave it up to you to tell us what you want to see. Therefore, if you don't want to use a random value for the Member ID, and don't want to type it in each time, we let you build your own list of "preloaded" member IDs. This enables you to define a list of IDs for the system to use. You can set up a simple list of 1 - 10000, or a more complicated list like, "13JEU4R5, 12JEU4R6, 12JEU4R7", or whatever you wish). The system won't care what the IDs are, it will just use one after another as you create new members. (See Preloaded Member IDs for more information.)

Every time you add a new member, the system looks at the preloaded ID's table and if there is anything available, uses the next value. You can even manually mark Preloaded IDs as active or used (they're automatically marked as Used when the system picks one). More importantly, if you start a new record, then cancel it, the system will go back and reset the ID it started to use, making it available again.

In addition, there is a Recycle Preloaded IDs preference that controls whether the system should recycle old IDs when the records that used them are deleted. (This is the scenario described above when record 5 was deleted.) If the preference is on, then when record 5 was deleted the system would find the entry in the Preloaded IDs table and mark it as available again. Then it would be used again by the next record.

Before You Ask...

The obvious question then is, "why don't we just do this automatically instead of expecting you, the user, to populate preloaded ID numbers?"

There are several reasons:

1 Not everyone cares about the member ID.

2 Not everyone uses numeric IDs.

3 Not everyone uses sequential IDs.

4 Some people **want** the ID to match the internal system ID.

Hopefully this information helps clarify how and why the Member ID field behaves the way it does.

15.6 Sample Statuses

Several sample statuses are loaded in MemberTies. You can keep these statuses, modify them, or delete them entirely and add your own. See Statuses for more information.

Name	Code	Expire On	Next Status	Grace	Dues	Prorate	Custom Amt	Hide	Default
Alumni	A	Never			$0.00	(None)			
Couple	C	Never			$50.00	(None)			
Distinguished	D	Never			$0.00	(None)			
Dropped	X	Never			$0.00	(None)			
Honorary	H	Never			$0.00	(None)			
Newsletter	N	Never			$30.00	(None)			
On Leave	L	Never			$0.00	(None)			
Prospect	P	Never			$15.00	(None)			✓
Regular	R	Never			$40.00	(None)			
Social	S	Never			$0.00	(None)			
(Delete)	DEL				$0.00	(None)			

The following explains the intended use for each of the default statuses,

- Alumni - an inactive regular member whose normal term of membership ended. This is essentially an entry in the membership archives. This is a member we want to keep track of, but is someone who no longer attends events regularly. The alumni status would not be set up to expire or pay dues, and is marked as Inactive.

- Couple - one of a pair of active members. The couple status is setup to require an association to at least one other member or group record.

  Note: Each record in a relationship is controlled by its own End Date. If a record with one date is related to another record with a different End Date, they will expire and change statuses (if appropriate) as their individual dates arrive, not together.

- Distinguished - an active member whose dues are paid for life by the organization.

- Dropped - members who have reached their End Date, but are not to be deleted from the database. Prospect, Newsletter, and Social members would typically be set to change to Dropped members when their End Date is reached.

- Honorary - a person affiliated with the group, but who does not pay dues and cannot vote. They are still considered active members in every other way.

- On Leave - a member whose membership is "on hold". We don't want to make them Alumni, or Dropped, because we expect them to return, but they aren't really active right now.

- Prospect - a new potential member. If they do not choose to join, typically they would be set up to change to Dropped a short while after the End Date passes.

- Newsletter - a non-member newsletter subscriber. If they do not choose to join, typically they would be set up to change to Dropped a short while after the End Date passes.

- Regular - a normal active member. If a Regular member does not renew their membership, they would typically be set up to change to Alumni after 90 days.

- (Delete) - a system-defined status that cannot be changed or removed. Any membership record set to (Delete) will be automatically deleted by the system. You can set statuses to expire and change to this status if you want to purge them automatically. Note that certain Log Off preferences affect the process of automatic deletion of these records.

Note: As mentioned above, many active membership status types would typically be set up with Expiration Behavior such that when the End Date is reached, possibly including a grace period, the status changes to Alumni or another inactive status. None of the sample statuses are set up this way to avoid unpleasant surprises for users who are unaware of how statuses can behave. If you want to add Expiration Behavior, simply modify the settings of a status. See Statuses for details.

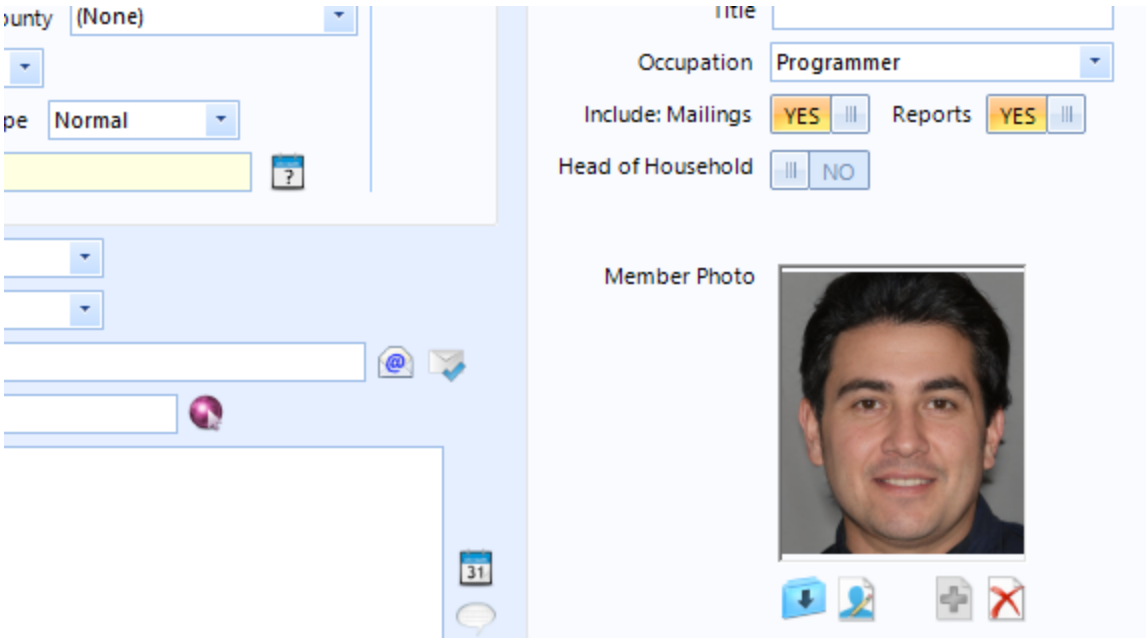
15.7 Photos

You can associate a .bmp, .gif, .jpg, or .png photo file to any membership or friend/family record.

The database will either contain the path to the file, or the actual file itself, based on the File and Photo Storage preference. If you choose to store the path to the file it is important to remember to move all photo files if the database is ever moved to another machine. This also means that updating an existing photo is as easy as putting the new file in your photos directory. As long as the name is the same, it will appear on the member's record automatically. Despite this, the recommended method is to store the file in the database, to ensure that it cannot be lost (and if you are running multiple installations, it may be the only way other users can see the same photo).

On a Member Record

The photo is displayed in the lower right of the member or friend/family record. The example below is a member record.



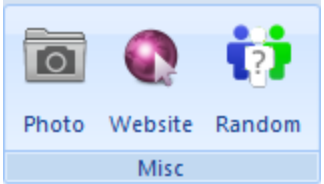
The icons below the photo enable you to save it to a file, edit it in the Image Editor, add a new photo, or delete the existing photo.

Notes:

- You can store any size of photo and display it, but a portrait-shape will work best because that will fit the layout of the image component of reports.
- Phones and digital cameras take very high resolution photos capable of filling a large computer monitor with a razor sharp image. This is great for photos that may be enlarged or printed, but it will require a lot of storage and is overkill for an ID card. We strongly recommend using the built-in Image Editor tool to resize photos to approximately 2" x 3" (144 x 216 pixels, 5.0 x 7.6 cm). This is enough for excellent clarity while only requiring about 50 KB of storage or less. Saving the photo as a .jpg format will also reduce the size.

Viewing a Photo from the Membership List

1. Click the Photo button in the Misc section of the Members ribbon.

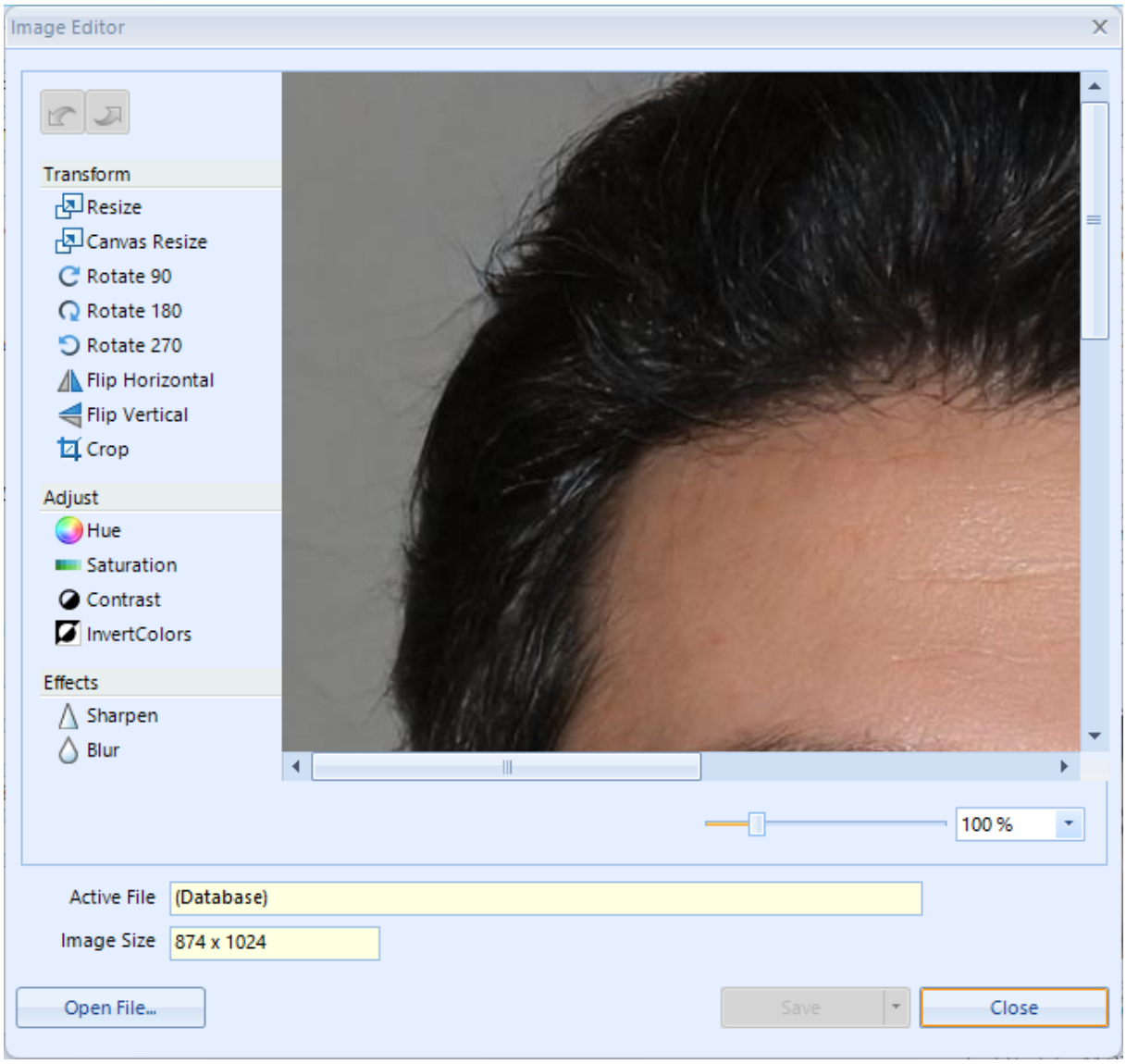


2. The full-size photo will display

Using the Image Editor

The image editor enables you to quickly resize any existing image, or open and resize an image on your file system.

In this example, the photo has already been saved to the database, but is fairly large (874 x 1024 pixels) as shown below the image.



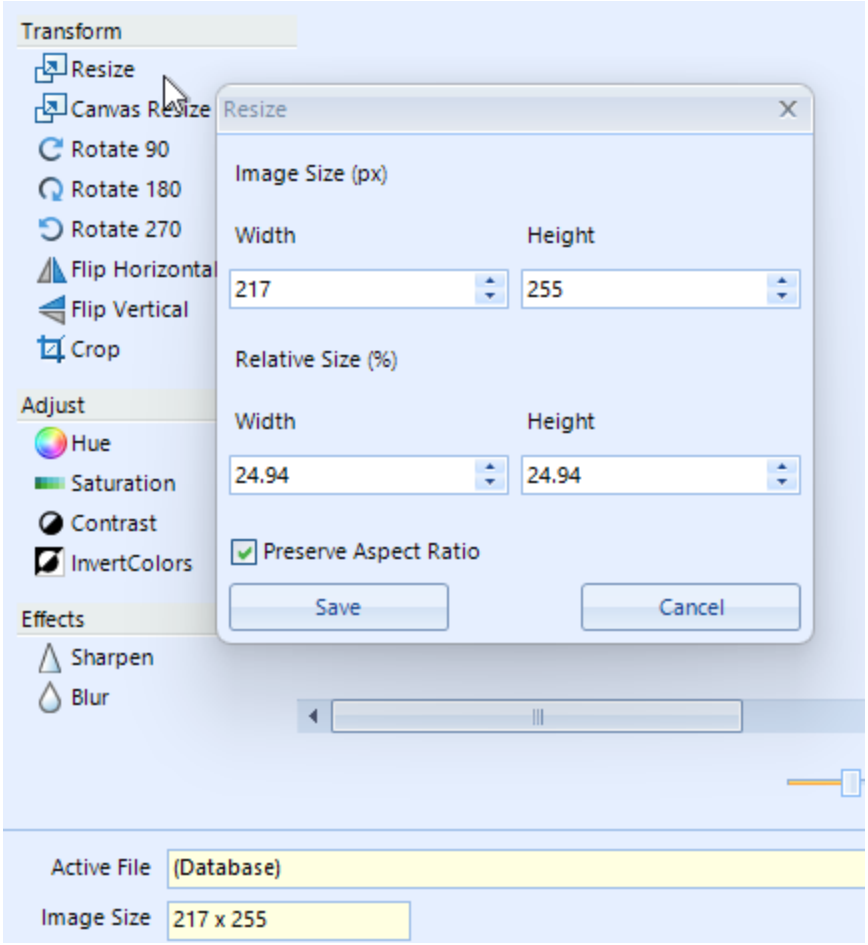
The following options are available:

- Undo/Redo
- Transform
  - o Resize - resizes the entire image
  - o Canvas Resize - resizes the canvas containing the image
  - o Rotate 90
  - o Rotate 180
  - o Rotate 270

- o Flip Horizontal - flips the image left-to-right
- o Flip Vertical - flips the image top-to-bottom
- o Crop - enables you to select a portion of the image to keep

- Adjust
  - o Hue - shifts the entire image across the color wheel from 0 to 360 degrees
  - o Saturation - shifts the color intensity of the image
  - o Contrast - adjusts the difference between the darkest and lightest parts of th eimages
  - o Invert Colors - reverses colors across the image
- Effects
  - o Sharpen - attempts to add definition to image details. Note that only the image resolution can truly sharpen an image. Nothing can make a blurry image magically crystal clear.
  - o Blur - attempts to reduce definition of image details
- Open File

To resize the image, click "Resize" under the Transform section.



Changing the Width to 25% (the system uses 24.94 based on its own calculations) immediately and the new size appears on the window below (217x255).

Click Save to accept the resize changes, and then Save again to return to the main member window with the updated photo. Then save the main record to write the new photo to the database and replace the old one.

Other options on the image editor tool are self-explanatory and can be freely experimented with, because you can always cancel the editor without saving changes.

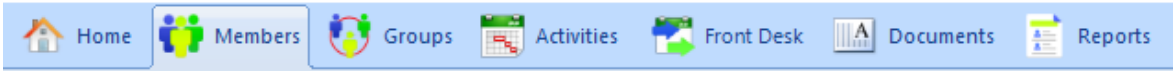
Note: The Image Editor has a "split" save button that allows Save and Save As. Choosing Save will save the new image to the same location as the existing one (database or file), whereas the Save As option will always save the image to the file system as a new file. This enables you to open and modify multiple images, saving each to the file system, potentially without ever modifying the image on the actual record.

15.8 Adding Members to Activities

With MemberTies Professional , you can assign one or more members, including an activity posting and amount, to one or more activities, directly from the Membership List.

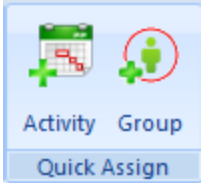
Assigning Members to an Activity

1. Choose the Members tab from the ribbon bar.

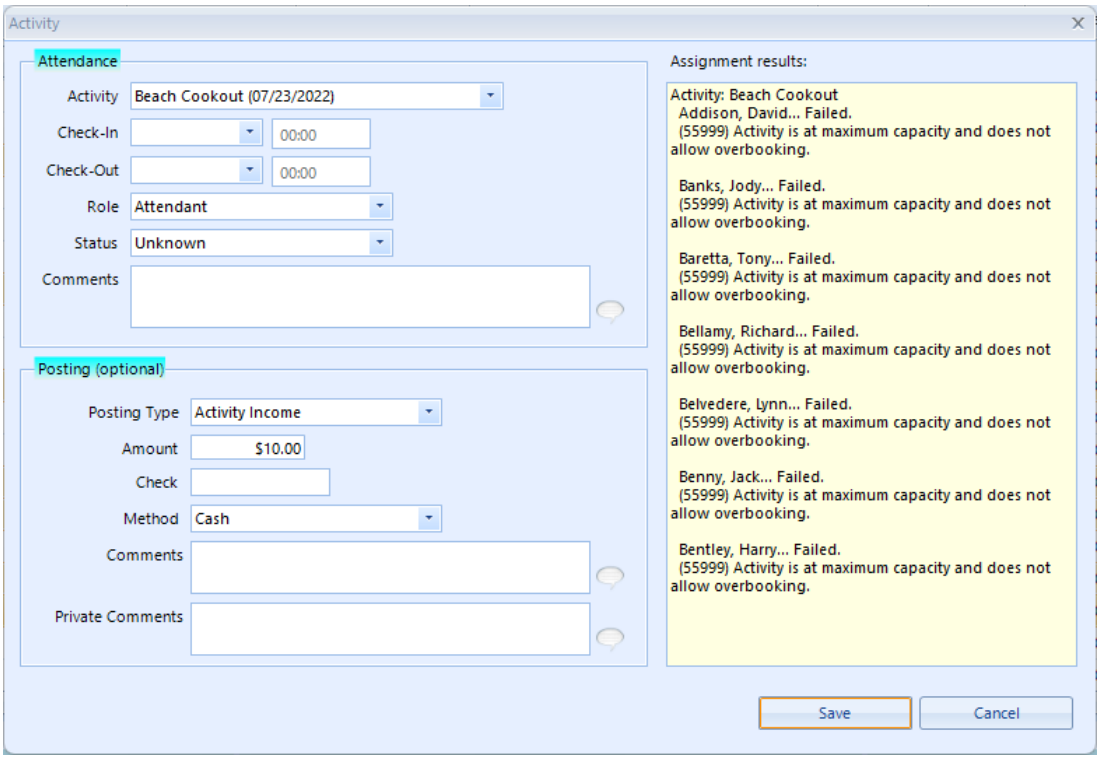


2. In the list that opens, select the records to be assigned to the activity. You can use the standard Windows selection methods.

3. In the Quick Assign section of the ribbon, click Activity.



4. The Activity window will open.



5. The following fields are available:

- Attendance
  - Activity - the activity to assign
  - Check-In - the date (and optional time) to assign as the check-in date

  - Check-Out - the date (and optional time) to assign as the check-out date
  - Role - the activity role to assign. See Activity Roles for details.
  - Status - the attendance status to assign. See Attendance Statuses for details.
  - Comments
- Posting (Optional)
  - Posting Type - the posting type to assign. See Posting Types for details.
  - Amount - the amount to post
  - Check - the cheque number or other payment identifier
  - Method - the payment method. See Payment Methods for details.
  - Comments - general comments about the entry
  - Private Comments - comments that will not appear on any system report

6. When the assignment is ready, click Save. The system will process all selected members and attempt to assign them to the selected activity. The Assignment Results area will indicate the results. In the example above, you can see that the first three members were assigned, and then the activity reached maximum capacity.

System Overrides

It is possible that the system will override some entries provided on this window to ensure that activity settings are enforced if applicable. In addition, it is possible that some members will not be successfully assigned to one or more activities. If errors occur, they will be displayed in the log file available after the process completes.

Some things that will cause the system to override settings include:

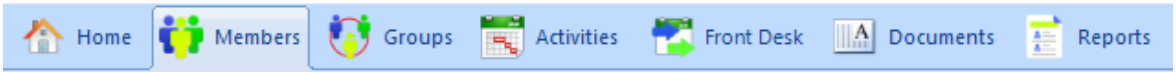
- If the activity has a specific capacity (and does not allow over-booking), and the capacity is reached either before or during the assignment process, all subsequent members will be ignored.
- If a member has a status that is not allowed to attend activities, the member will be ignored.
- If the Start or End Date provided falls outside the range required by the activity, the Start and/or End Date of the activity will be substituted for all members for that activity
- If the Start or End Date of the activity is to be copied to the attendance record, the Start and/or End Date of the activity will be substituted for all members for that activity

15.9 Adding Members to a Group

Whenever the Membership List is open, you can assign one or more members to one or more groups with just a few clicks.

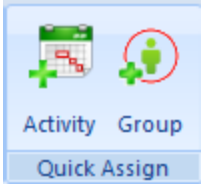
Assigning Members to a Group

1. Choose the Members tab from the ribbon bar.

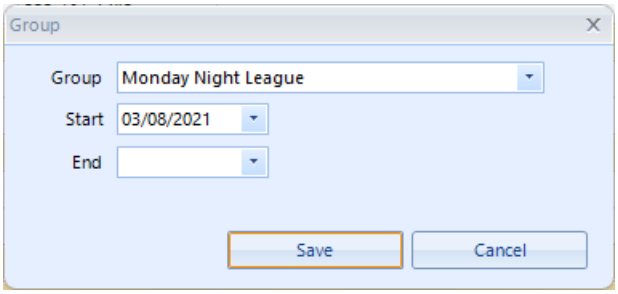


2. In the list that opens, select the records to be assigned to the group. You can use the standard Windows selection methods.

3. In the Quick Assign section of the ribbon, click Group.



4. The Group window will open.



5. The system assigns each selected member to the group (unless they're already members), and displays the total assigned.

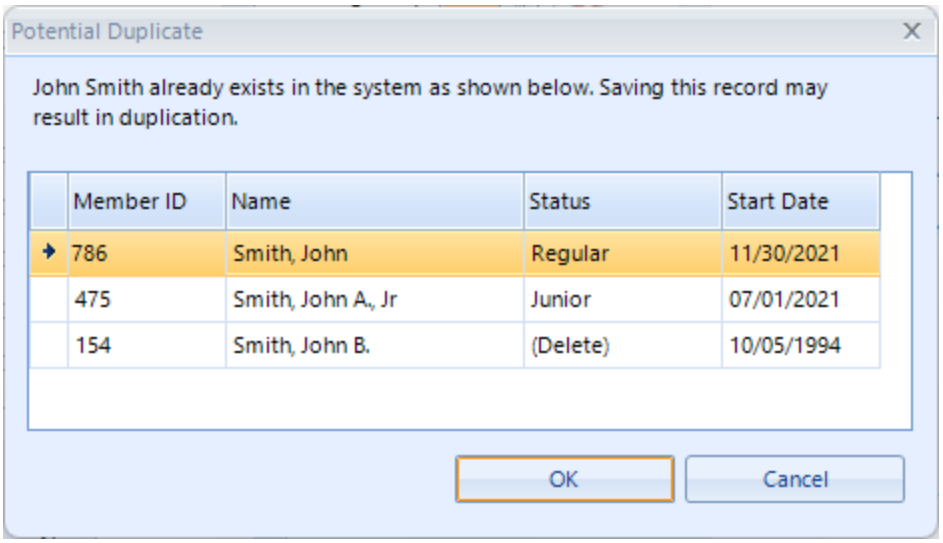
15.10 Checking for Duplicates

When adding a new member record, the system will check for potential duplicates using the new record's First and Last name. Other parts of the name, such as prefix, suffix, and middle initial are not included in the check.

The Check for Duplicates membership preference controls whether the system will make this check.

Checking for Duplicates

If one or more potential duplicate is found, a window displays the matches.



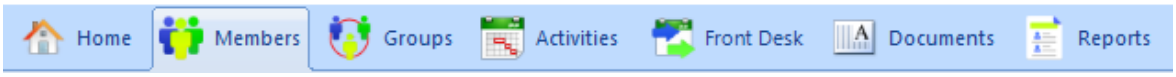
Choose OK to continue the save, or Cancel to abort.

15.11 Changing Data (Mass Change)

The Change Data window enables you to change data in multiple fields at once, for multiple records at once, directly from the Membership List.

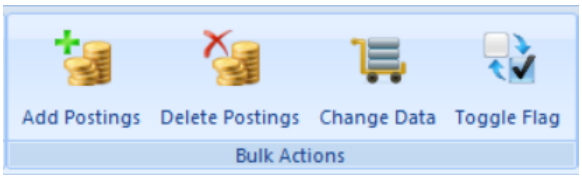
Changing Data

1. Choose the Members tab from the ribbon bar.

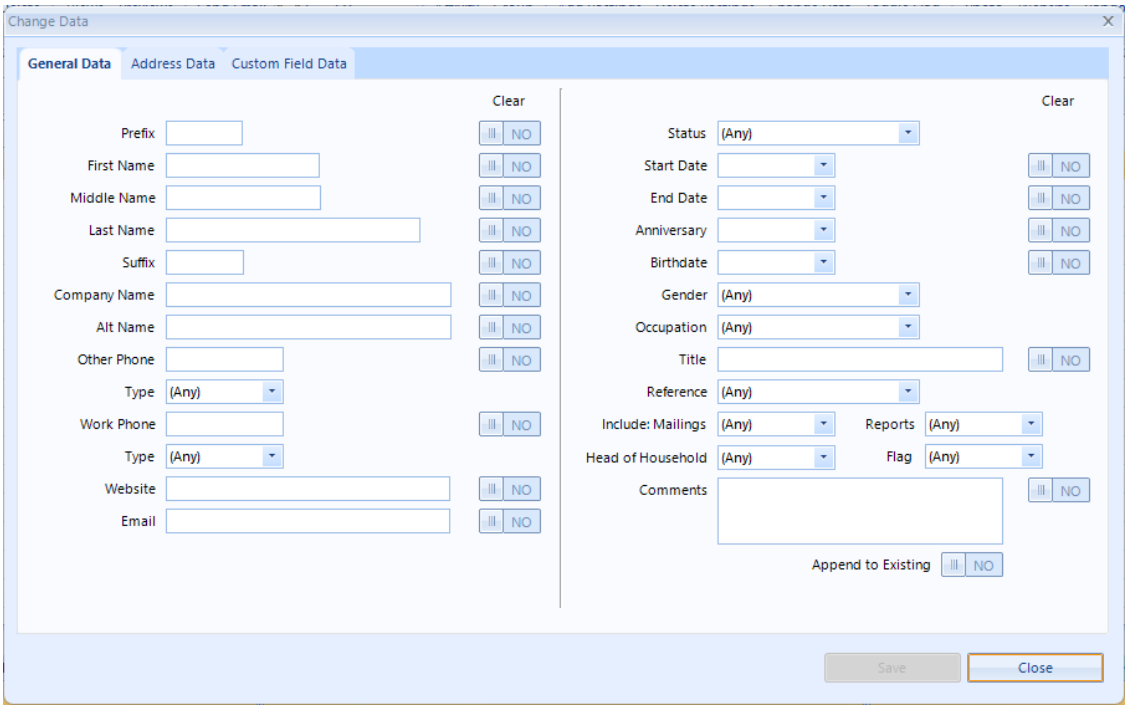


2. In the list that opens, select the records to be modified. You can use the standard Windows selection methods.

3. In the Bulk Actions section of the ribbon, click Change Data.



4. The Change Data window will open.



5. The window is divided into three tabs. You can make changes on any or all tabs, and then click Save to apply those changes to all selected records.

Note: To clear a field, turn on the "Clear" switch to the right of the field. If no switch is available, the field may be a required system field, defined as required (for a custom field) or may require a choice from a list of options.

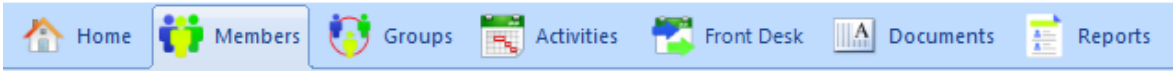
Note: Each membership record must have either a first and last name, or a company name. If you choose to clear one of these fields, the system will not update the record if doing so would violate this rule. i.e., if you try to clear the company name, and one of the selected records has no first or last name, the update will be ignored on that record.

15.12 Toggling Flags

There are several "flags" on the member record that can be updated across all selected records from the membership list.

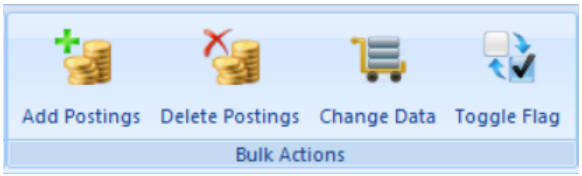
Toggling Flags

1. Choose the Members tab from the ribbon bar.



2. In the list that opens, select the records to be updated. You can use the standard Windows selection methods.

3. In the Bulk Actions section of the ribbon, click Toggle Flag.



4. The Toggle Flag window will open.

5. Choose the flag to update, then click Save. The system will switch the selected flag from its current setting to the opposite.

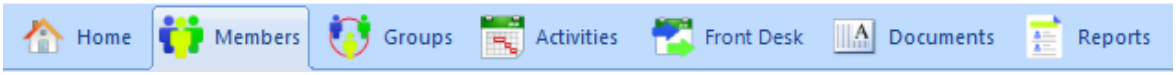
Note: A refresh of the list may be required to see the updates.

15.13 Choosing Random Members

The Choose Random Members window enables you to have the system randomly select a specific number of members from the currently displayed membership list. For example, if you select a monthly winner from amongst all members who have donated more than $100, or all members who attended a specific activity, you can search for those members on the membership list, then use this window to pick a random winner from those results.

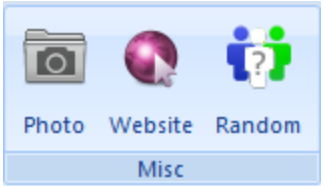
Choosing Random Members

1. Choose the Members tab from the ribbon bar.

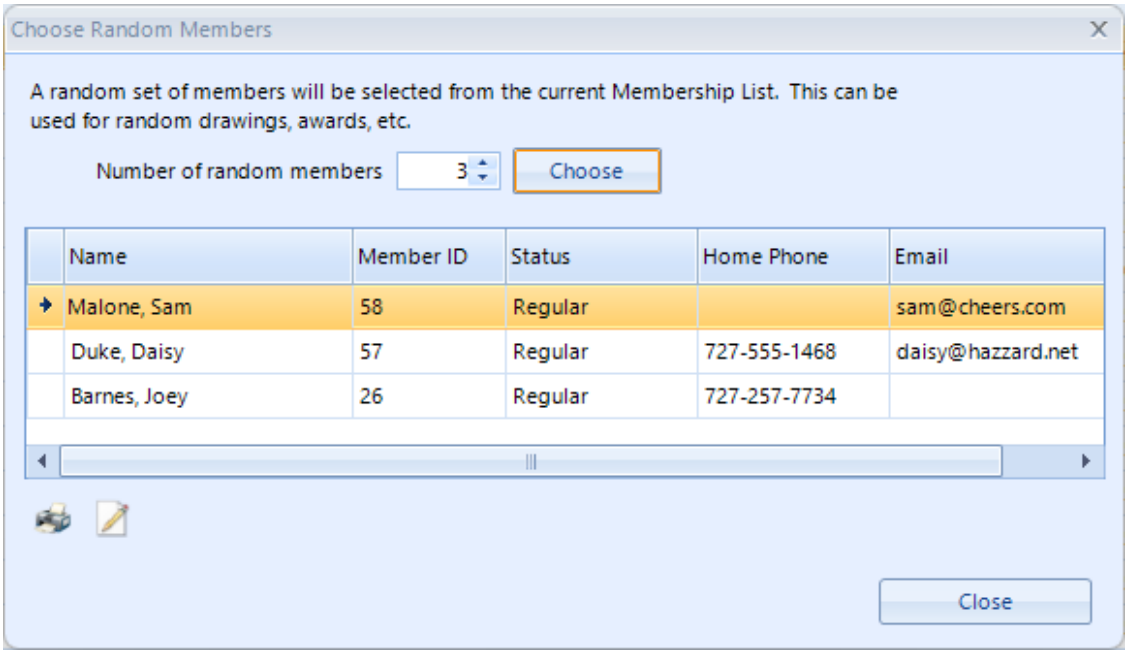


2. In the list that opens, search for the set of records you want to select from, if necessary. See Searching for Records for details.

3. In the Misc section of the ribbon, click Random.



4. The Choose Random Members window will open.



5. Enter the desired number of records and click "Choose."
6. The selected records will be displayed in the list.
   - To print the list, click Print.
   - To open any of the records for editing, select the desired record and click Edit.
7. When you're finished, click Close.

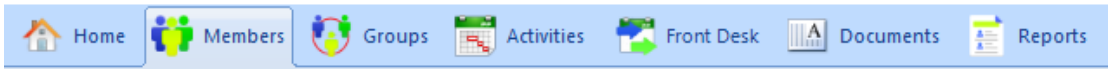
15.14 Working with Members

15.14.1 Members Overview

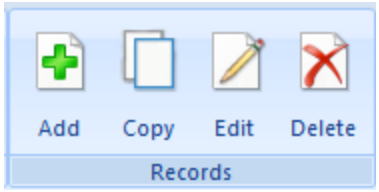
New records can be added to the database whenever the Membership List is active.

Working with Members

1. Choose the Members tab from the ribbon bar.



2. In the Records section of the ribbon choose Add to create a new member, or select an existing member in the list, and choose Copy, Edit or Delete.



3. The Edit Member window will open with the General Info page selected. If this is a new record, you must complete the General Info page before you can switch to other pages. See below for descriptions of each page:

   - General Info
   - Dues Postings
   - Donations Postings*
   - Friends & Family
   - Associated
   - Groups
   - Assigned Items
   - To Do List
   - File List
   - Activities*
   - Custom Fields

4. Complete all appropriate information, then click Save.

5. When finished, click Close.

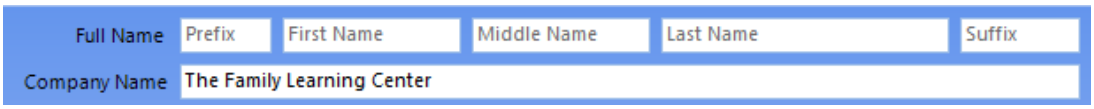
Notes

- Your changes to the activity may not appear in the Activity List until it is Refreshed.
- If you're using MemberTies Professional, deleting an activity will also remove all associated Income and Expenses, as well as all associations between members and that activity. However, deleting the activity has no affect on the membership records themselves.

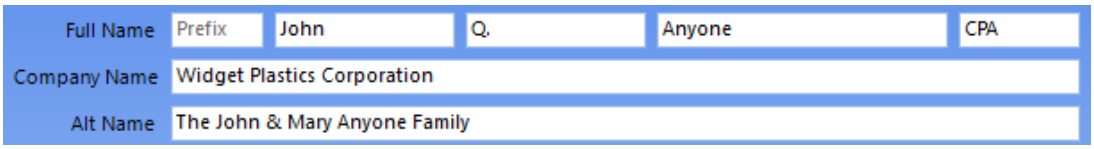
- An Auto-Save preference controls whether the system prompts you to save or cancel changes when changing pages.

Membership Record Basics

- **Name** - Each membership record must have *either* a First and Last Name, or a Company Name. If you want to have the system display the Company Name instead of the first and last name, leave the name fields blank and enter only a company name as shown:



Another common need is to enter the normal first and last name, but to send mailings to a "family" name. This is done with the Alt (alternate) Name field as shown below. The value in the field will be automatically used instead of the name or company name on system defined mailing label reports.



- **Member ID** - The Member ID is a required field, and it must be unique. You can put anything you like into this field, but by default the system will assign a unique number to the field that matches the internal id of the membership record. This is done simply to save you the trouble of deciding on a unique value if you don't care about the contents of the field. You can also build a list of Preloaded Member IDs that the system will use automatically as you create new records.

- **Address -** You don't have to enter any address information except the Country.

- **Status** - The membership status is required. If you don't like the status options that come with MemberTies, you can create your own.

- **Start Date** and **End Date** - These dates are optional, but an End Date is required if the status has been defined as one that expires (expiration is assumed to take place on the End Date, so the system needs to know when that occurs). The Start Date represents the date the person first became a member (or became associated with the group). Typically, the Start Date never changes, but the End Date is updated each time dues are renewed.

- **Dues and Donations** - Monies received from the member as part of belonging to the organization are recorded as dues, as opposed to donations* given freely.

- **Associated** - Members are often linked to other members, as family members, sponsors, teammates, etc. You can also tell the system to always require a relationship for certain membership statuses. For example, a "family" status might

logically require that the person assigned that status be related to at least one other member.

- **Assigned Items** - items are useful for tracking things that can be assigned to a member more than once. Offices a member has held, or awards a member has won are good candidates for "items" because one person could have held many offices. Other simple data like "nickname" or "hair color" do not need to be set up as Items, because they are normally only assigned once. See Categories & Items for more details.

Tracking Spouses and/or Children

There are two primary methods of tracking these "other people" related to a member, and the method that works best for you depends on how you classify them and what data you need to track.

- Associated Members

  An associated member is normally used when the "other" member is a true dues-paying member of your organization. This kind of record has its own Member ID, they receive mailings and email, they can pay dues, make donations, have their own To Do items, etc. Associated members are full membership records. Normally, an Associated member record would be a mentor, a golf partner, a spouse who is a full member, a referring member, etc. See the Associated page for details.

- Friends & Family

  A friend/family record is normally not a member of the organization. These are the children, spouses, etc., of your true members whose information you need to know for various reasons; but, are not actual dues-paying members. All of these records are subordinate to the main Member record. In other words, the system assumes that they are never contacted directly, queried for (with the exception of activity attendance, see below) or reported on. Email and mailings would normally go to the main dues-paying member. These records have only a few fields of key information, such as name, birth date, gender, photo, and a contact info, normally for an emergency contact.

  Friends & Family records **can** be checked-in to activities just like regular members, to allow situations where the member's family attends the gym, pool, etc. But even in this situation, associated activity income and expenses tie back to the main member because that is the person the system assumes pays the bills. Normally, a Friends & Family record would be a non-member spouse, a child, or another person of interested in the club that is linked to the member. See the Friends & Family page for details.

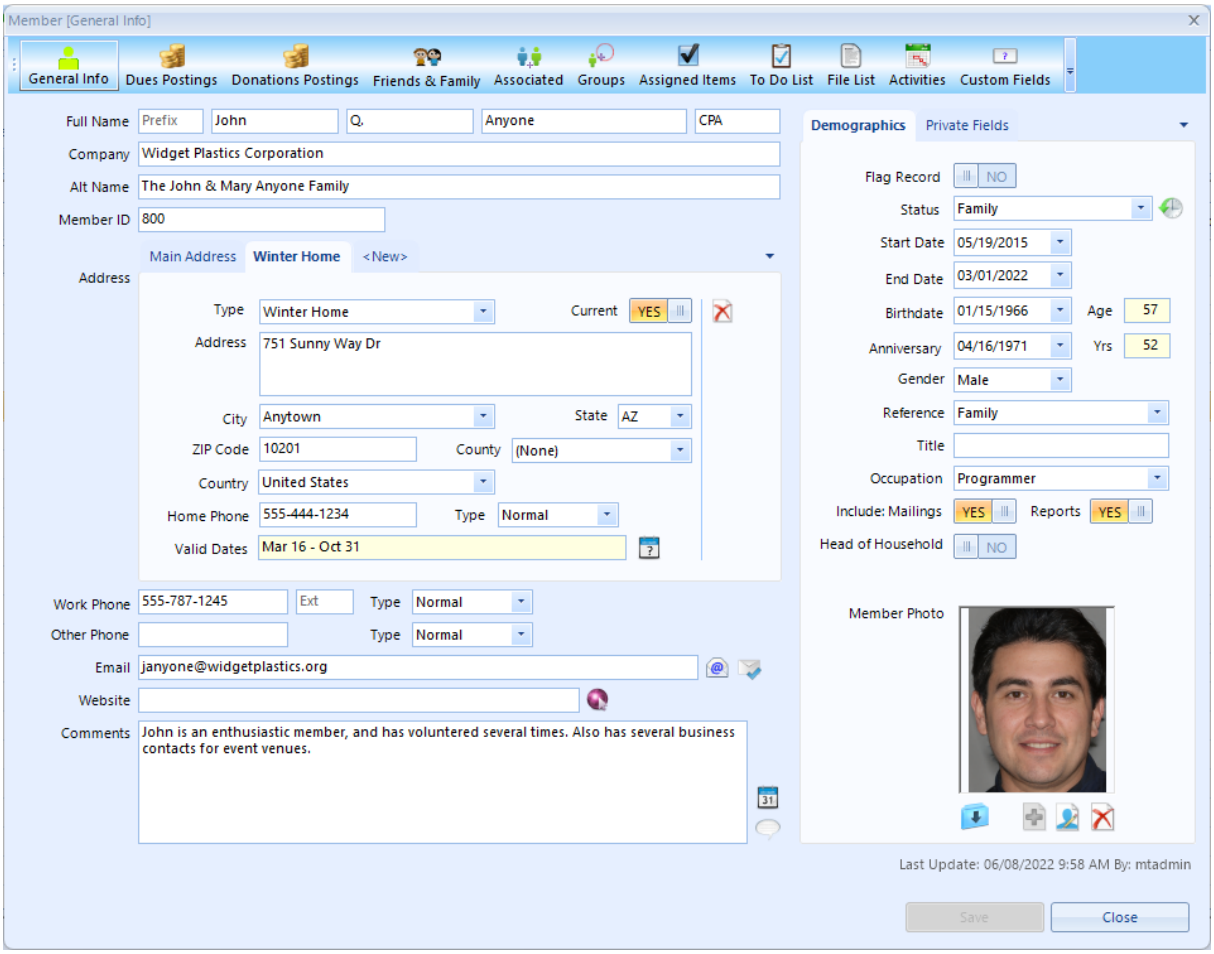
Changing the Page Order

If there are pages you never use, or pages that you use more than others, you can control which pages appear on the window. See Changing Page Order for more details.

* Professional Version Only

15.14.2 General Info Page

This page contains basic contact information for the member.



The following fields are available:

- Full Name - the prefix, first, middle, last, and suffix parts of the member name. If a single letter is entered for the middle name, the period will be added automatically (i.e., "A" becomes "A.") but if more than one letter is used, a word is assumed and it is not changed (i.e., "Aaron" remains "Aaron").

  The Prefix and Suffix fields can be used for prefixes like "Dr.", "Mrs.", "President", etc., or suffixes such as "Jr.", "2nd", "PhD" or other titles. This data appears with the name on all reports that show the full member name. Note that if you would prefer to have the

cursor begin in the First Name field instead of the Prefix, you can set the Starting Field preference.

- Company Name - the Use Company Name preference controls whether this field will display on reports along with the member name. However, if there is no first/last name available the company name is displayed automatically, regardless of the preference setting.

  Note: either a First and Last name, or a Company Name is required

- Alt Name - can be used to provide an alternative name for use on mailing labels (or all address blocks, see below). System mailing labels will automatically use the value in this field if it is available. This field will also take priority on user-defined labels and post card reports over any of the "Name" smart fields. The Use Alt Name report preferences control whether the Alt Name value is used on cards, labels, and other system reports.

- Member ID - the ID is automatically set to the internal system ID number of the record, because it is a required field; but, you can also assign your own membership ID. If you don't enter a customized member ID, the system ID will be used. This field is commonly used for a social security number, driver license number, or similar unique ID. See About Member IDs for more information.

  You can also tell the system to add specific text to the front of each generated Member ID. This would enable the New York chapter of a national organization to automatically start every ID with "NY", for example. See the Member ID Prefix preference for details.

  Note: It is a common mistake to assume that the Member/System ID represents a "count" of records. This is not true. The system ID is a sequence of numbers maintained internally by the database. When you save a membership record, the ID is "used" regardless of whether you subsequently delete the record, thus, if the ID defaults to 10 and you later delete the record, the next record you create will be 11, not 10, because 10 is "used" and gone.

- Address - the member address. See Address Overview for details about entering addresses.

- Work Phone & Extension - a work phone number, optional extension, and phone type

- Other Phone - an additional phone number and phone type

- Email - the member email address. You can enter multiple addresses separated by a comma or semi-colon.

- Website - the website associated to the member

- Comments - general comments

Demographics Tab

- Flag Record - This option provides a simple way of "marking" a record. It is intended to provide a temporary means of identifying certain records so they may be quickly queried for on a report. The meaning of the "flag" is up to you. Perhaps you need to send a special mailing to new members. You could set the Flag on new records as you enter them, then run a mailing label report using criteria that only retrieves records where, "Flag = Selected". When you're finished, you could use the Toggle Flag button on the members ribbon to clear all the flags. If you would like the Flag to be set automatically on all new records, enable the Set Flag on New membership preference.

- Status - the current membership status of the record. You can have any number of membership statuses defined, each of which can have many properties of its own. For example, the status can be updated automatically by the system if set to Expire. Values can be preloaded, but new entries can also be entered and you will be prompted to add the new entry to the list. See Statuses for more information. Note that if you choose a status that requires an associated record (this is another property of the status code you can define), you will have to link the required member and/or group before saving the record.

  Note: The Status Change History report details the history of changes made to a member's status. This history is accessible via the icon next to the status field. See Changing Status History for details.

- Start Date - the original date the person joined the group, regardless of their current status. This is the date the Retention report looks at when determining who joined when. If you want this field to indicate the starting date of the current status, you may do so, but the reports based on this date may be inaccurate. The start date is populated automatically based on the Default Start Date preference.

- End Date - the date on which the person's membership expires. This field is required if you select a status that has been setup to Expire (because a status that expires will have a "next status" defined, and the system needs to know when to change the record to the "next status") If the status does not expire, the End Date is optional. The end date can be populated automatically by setting the Default End Date preference.

- Birthdate - the member's date of birth. If you do not know the birth year, you may enter "9999" as the year. A 9999 year will appear on this window, but on other system-defined reports, the 9999 will be suppressed. On other reports and views, the 9999 is only suppressed in the "Birth Year" component, since 9999 is the same as "no year." When creating user-defined reports and views, various smart fields are available to show birth date component values.

- Anniversary - the member's anniversary date (The type of anniversary is up to you. Typically it is a wedding anniversary, but could also be a graduation date, etc., based on your data)

- Gender - the member's gender. See Genders for details.

- Reference - the way the member heard about or was referred to the organization. Values can be preloaded, but new entries can also be entered and you will be prompted to add the new entry to the list. See References for details.
- Title - the member's job title
- Occupation - the member's occupation. Values can be preloaded, but new entries can also be entered and you will be prompted to add the new entry to the list. See Occupation Names for details.
- Include in Mailings - indicates whether the member should appear on mailing label reports. This setting can also be changed automatically based on the status you select. See Statuses for details.
- Include on Reports - indicates whether the member should appear on non-label reports. This setting can also be changed automatically based on the status you select. See Statuses for details.
- Head of Household - If you enter all members of a household, you can use this setting to designate a particular contact person. There is no special processing tied to this field by the system but it can be useful for searches.
- Member Photo - the member's photo, if available. See Photos for details.

Private Fields Tab

This tab is used for sensitive information. This information is not available on any system report, and cannot be used as criteria without the appropriate security settings. Note that you can create a user-defined report that includes private data if you choose. Security rules are also available to prevent certain users from viewing this tab at all.

Important: Your data is only as safe as your computer. If critically confidential data is stored in MemberTies Professional, or any other program, it is only protected to the degree that your computer is protected. If someone has access to the physical machine, they can eventually get to any data stored on it. Myrro International cannot guarantee the privacy of any data in the database, because we cannot control the access to the machine where it is stored.

The tab includes eight fields that can be labeled however you wish (similar to the fields on the custom tab, but only the names can be changed), and one large Comments field.

See the Private Field Labels membership preference to set private field names.

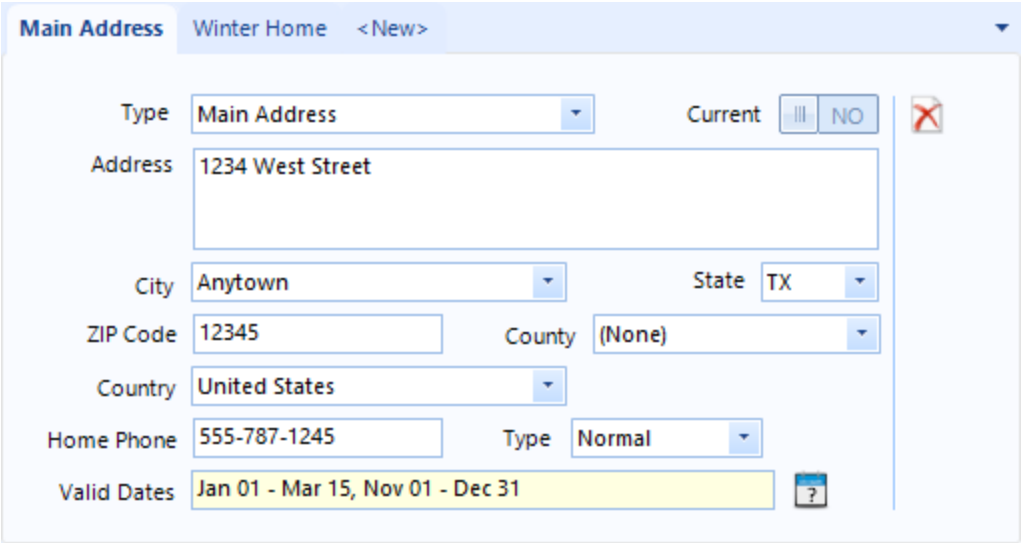
15.14.2.1 Address Overview

Member and Group records support addresses.

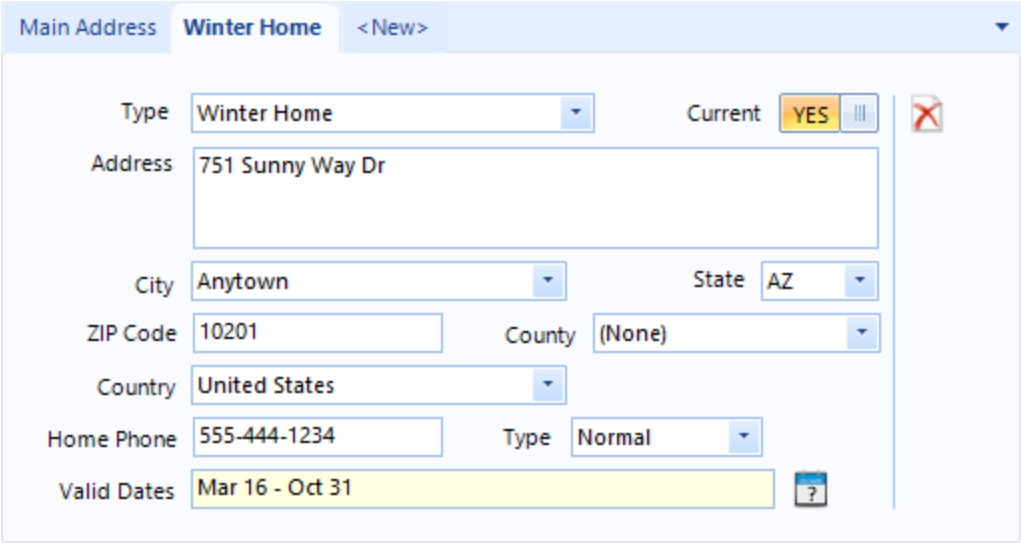
The standard version tracks a single address. The professional version enables you to create multiple addresses by clicking the "<New>" tab. In this case we created a second

address called Winter Home.area that supports a single address (for the standard version) or multiple addresses (for the professional version).

The two versions of the address area are shown below



Standard Version Address



Professional Version Address

Note: The word "State" changes to "Province," and "ZIP Code" changes to "Postal Code" if the Language preference is not US English.

The following fields on the address need a little more explanation:

- Type - each address must be given a type that can be used as report criteria. (This is most useful in MemberTies Professional where multiple addresses can be created for

each membership record, because it enables you to run a report to find anyone with a "Work Address" located in "My Town", for example.

o In the Standard version, the type is assigned in the Address Type miscellaneous preference.

o In the Professional version, a you can choose from the list of Address Types. See Address Types for more information.

- Address - the complete "street address," excluding geographic data like city, state, etc. Multiple lines are allowed. For example,

```
100 Main Street
Apt 6
```

- City - lists all cities that are defined in the database. Values can be preloaded, but new entries can also be entered and you will be prompted to add the new entry to the list. The city marked as the default will be used automatically on new address records. See Cities for more information.

- County - lists all counties defined in the database. Values can be preloaded, but new entries can also be entered and you will be prompted to add the new entry to the list. The county marked as the default will be used automatically on new address records. See Counties for more information.

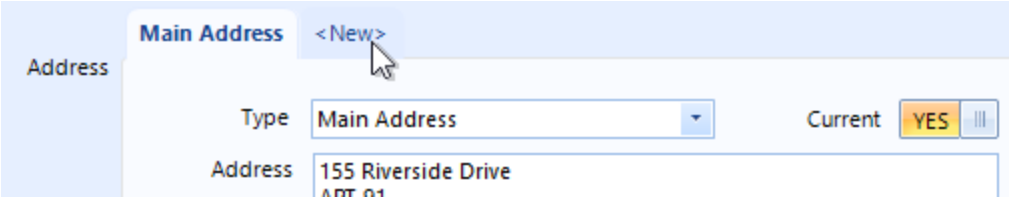
- State - lists all states/provinces defined in the database. The State marked as the default will be used automatically on new address records. See States for more information.

- Country - lists all countries defined in the database. The Country marked as the default will be used automatically on new address records. See Countries for more information.

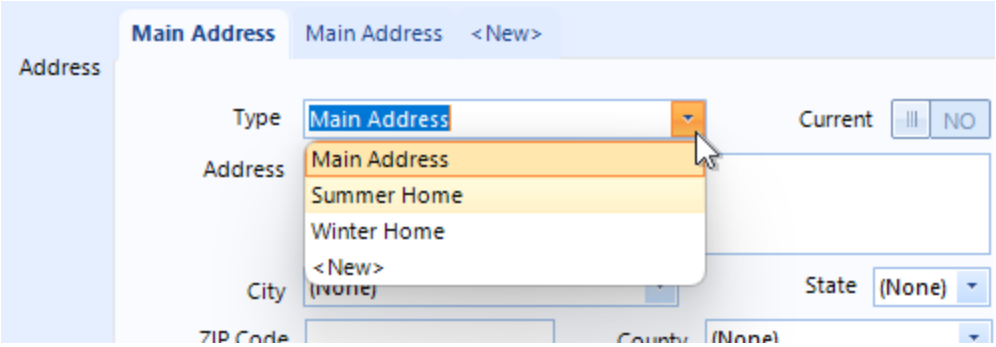
- Date Ranges* - If a record has addresses that are valid only at certain times of the year, you can have the system automatically keep the proper address current by creating one or more date ranges within which each address is valid (see below).

Adding a New Address

Each address displays in its own tab. To add a new address, click "<New>" and a new tab will appear.



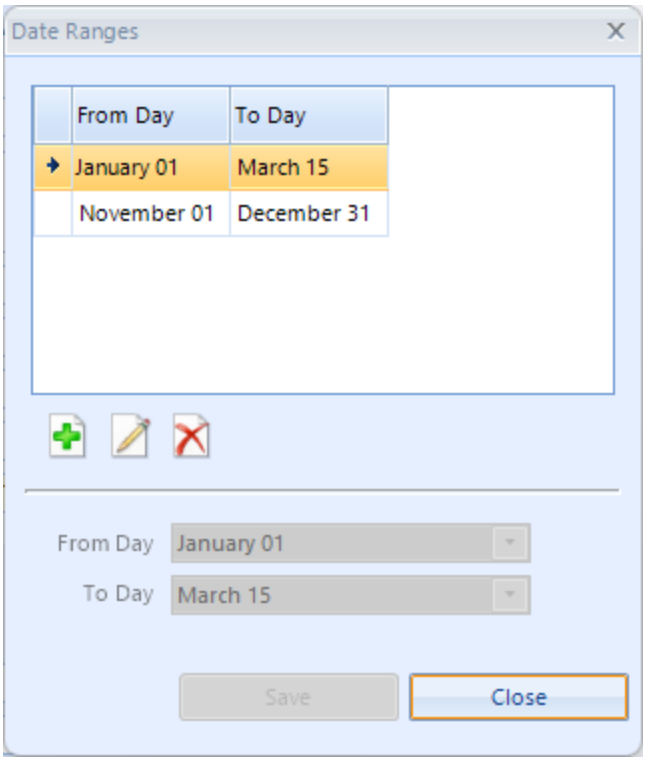
The new address is created with the default Type. Change the type to whatever is appropriate.



Using Date Ranges*

In some cases, the additional addresses may be specific to a summer/winter home, or home/school address, where you know an address is valid during a certain period of the year. Clicking the calendar icon next to the Valid Dates field enables the assignment of the date range. Once set, the system will use the date range to decide which address is active.

This window provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.



Crossing Years

When a date range crosses one year to the next, i.e.,

```
November 01 - March 15
```

the system will notice this when you save, and it will automatically split it into two entries:

```
November 01 - December 31
January 01 - March 15
```

Note: if you use a date range for **any** address on the record, you must ensure that **all** days of the year are covered with one address or another.

Ensuring that all days are covered allows the system to automatically set the appropriate address as Active based on the day of the year. Addresses using date ranges are re-evaluated every time you log in.

* Professional Version Only

15.14.2.2 Viewing Status History

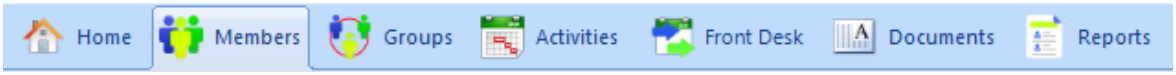
Each time the status of a membership record changes, whether manually or via an automatic process based on the status expiration settings (see Status Codes for details), the change is recorded in the Status Change History.

This history log can be edited if you need to correct an error or possibly to add an entry for a change that occurred prior to using MemberTies.

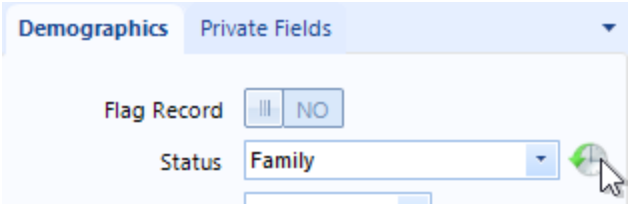
Viewing/Changing the Status History

Note: The ability to change the history may be restricted via Security.

1. Choose the Members tab from the ribbon bar.



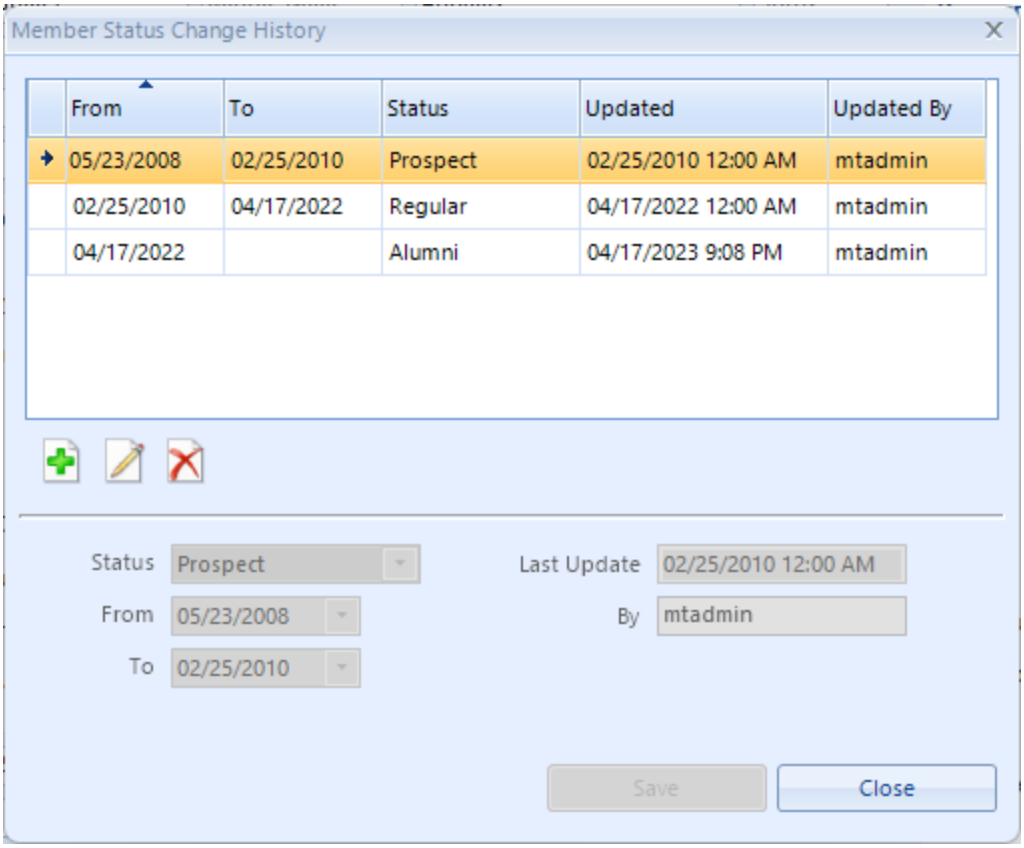
2. In the list that opens, select the record you need to change, then click Edit.
3. On the Member record, click the History icon to the right of the Status field.



4. The Member Status Change History window lists all changes recorded for the current member. (The current status will show a blank "To" date.)

   Note: The Status and To date are not editable on the active (current) status. To change

this status, make a normal update to the member record. The To date will be filled in by the system when the next change occurs.



5. The following fields are available:
   - Status - the status the entry is for
   - From - the date the member was assigned the status
   - To - the date the member ceased to be assigned the status
   - Last Update - the last time a change was made to this data
   - By - the user (or "system" if it was automatic) who made the change
6. When you are finished, click Save.

15.14.3 Dues Postings Page

The Dues Postings page is used to post amounts to a member's Dues account. The current account balance is displayed at the bottom of the list, as well as a subtotal of the selected rows.

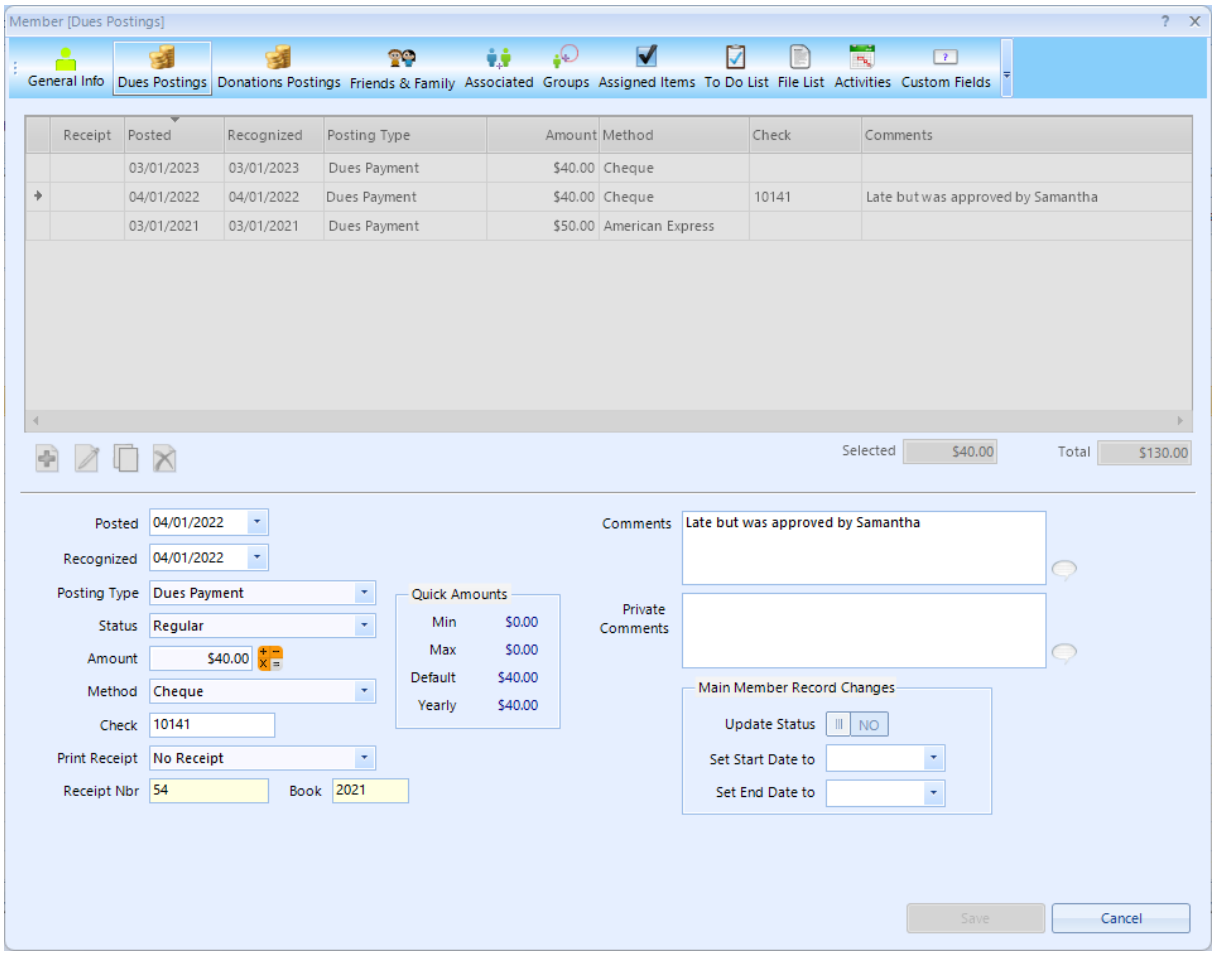
Note: Posting types, shown in the example below, only apply to MemberTies Professional.

This page provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

The two fields below the list quickly show balances:

- Selected - sums all selected rows
- Total - sums all rows, selected or not

To create a new record, click Add; or, select an existing record and click Edit, Copy, or Delete.



The following fields are available:

- Posted - the date on which the entry is being recorded
- Recognized - the date on which you want the amount to apply to your organization. Since most activities tend to start and end in a short time period, the date recognized

will normally be the same as the date posted. But if you need to prepare for an activity during the latter part of one year but actually account for it the following year, you can use the date recognized to identify these entries. That way, a report run for the first quarter of next year will show an entry that was actually posted the year before.

- Posting Type* - the posting type to be applied to this entry

  Note: The posting type will be defaulted to the default Dues posting type specified in the Posting Types list, if available. If no default has been set, the type will be blank. See Maintaining Posting Types for more information.

- Status - the status being purchased. You do not have to enter the status of the actual membership record (you might be entering a historical dues payment for a previous status, such as "prospect", even though the member is actually a full member now). There is no connection between the status entered here and the status of the main record, though you can have the system synchronize them (see below).

  Note: When creating a new dues posting, the status will default to the status of the member record.

- Amount - The amount to be recorded. Only positive numbers may be used. The posting type determines whether the amount is applied as a debit or credit to the account. You can also use the Dues Calculator* icon to the right of the Amount field to calculate or prorate the yearly dues amount for the status.

  Note: The Quick Amounts section shows any minimum, maximum, or default amount defined for the selected posting type, and the yearly dues amount defined for the selected Status. These amounts can be quickly entered by clicking the amount.

- Method - the payment method used. See Maintaining Payment Methods for more information.

- Check - the cheque number or other payment identifier

- Print Receipt -controls when a receipt should be printed for the entry:

  - No Receipt - indicates that no receipt needs to be printed at all

  - Mark for Printing - indicates that the record should be marked so that you can run a receipt report from the Reports window, and use Print Receipt as part of your report criteria to print all marked receipts at once.

  - Print on Save - indicates that a receipt will be automatically printed when the OK button is clicked to save the entry. The system will automatically switch the setting to "No Receipt" after printing.

    Note: The "Include on Reports" setting for the member is ignored when printing from within the member record (such as a receipt), unlike printing from the

reports window where the flag is applied automatically unless overridden in your search criteria.

- Receipt Nbr/Book - these fields are enabled whenever the selected posting type is one that has been defined to generate a receipt number. The fields are disabled for all other posting types. The Receipt Number is a sequential number generated by the system. The Receipt Book is the value set in preferences.

  Note: The receipt number is not automatically generated until the record is saved or a Receipt is printed via the Receipt button. This ensures that the next receipt number is not used until it is needed.

  Note: if the receipt icon is displayed next to the Book field, it enables you to force the system to generate the next receipt number immediately. Note that once a receipt number has been generated, it is "used" permanently, even if you choose not to save the entry. The only way to reset it is via the Receipt Book Numbers preference. If you want to "regenerate" a new number for an entry that already has a receipt number, you must clear the field first, then click Assign Now to generate a new number. If you do not want the Assign Now option to be available at all, it can be turned off via the Display Assign Now preference.

- Comments - general comments about the entry

- Private Comments - comments that will not appear on any system report

- Main Member Record Changes

  o Update Status - controls whether the status of the main record will be updated to match the status on this posting

  o Set Start Date To - if the member should receive a new Start Date because of this entry, enter the new date. The system will update the date on the main record automatically.

  o Set End Date To - if the member should receive a new End Date because of this entry, enter the new date. The system will update the date on the main record automatically.

  The Suggest New End Date* preference can be used to make the system automatically select this option and enter a suggested date in the Set End Date field. This preference lets you specify the way the new End Date should be determined when posting debits or credits.

Printing Receipts as a Group*

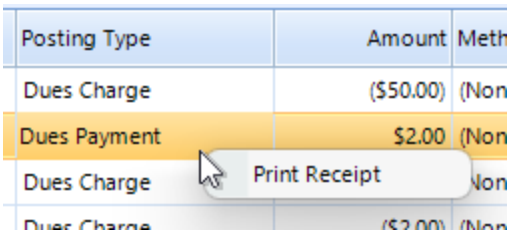
As described above for the, "Print Receipt" field, you have the option of marking many entries for future receipt printing.

If you choose to print a batch of receipts via the Reports window, you will probably want to clear the "Print Receipt" flag from your records. This is not done automatically because the system has no way of knowing whether or not the printing was successful. Your printer may have jammed, been out of ink, printed poorly, used the wrong paper, etc., so you must clear the flag manually. This can be done on the Reports window using the Clear Receipts option on the ribbon.

Additional Dues Capabilities*

If you are using MemberTies Professional, there are some other dues-related options:

- You can post dues directly from the Membership List to any number of selected records, or records with a specific status. See Posting to Multiple Records for more information
- The system can automatically post dues on new records, the start date, the end date, or on specific dates, all based on the member's status. See Maintaining Statuses for more information.
- The system can automatically post interest charges to past-dues accounts based on the member's status. See Maintaining Statuses for more information.
- You can maintain a separate list of Donations that do not affect the dues account at all. See the Donations page for details.
- You can create a Deposit containing any number of posting entries. See Tracking Deposits for details.
- If the posting uses a Posting Type that can generate a receipt, you can right-click the entry in the list to print the receipt directly.



* Professional Version Only

15.14.4 Donations Postings Page

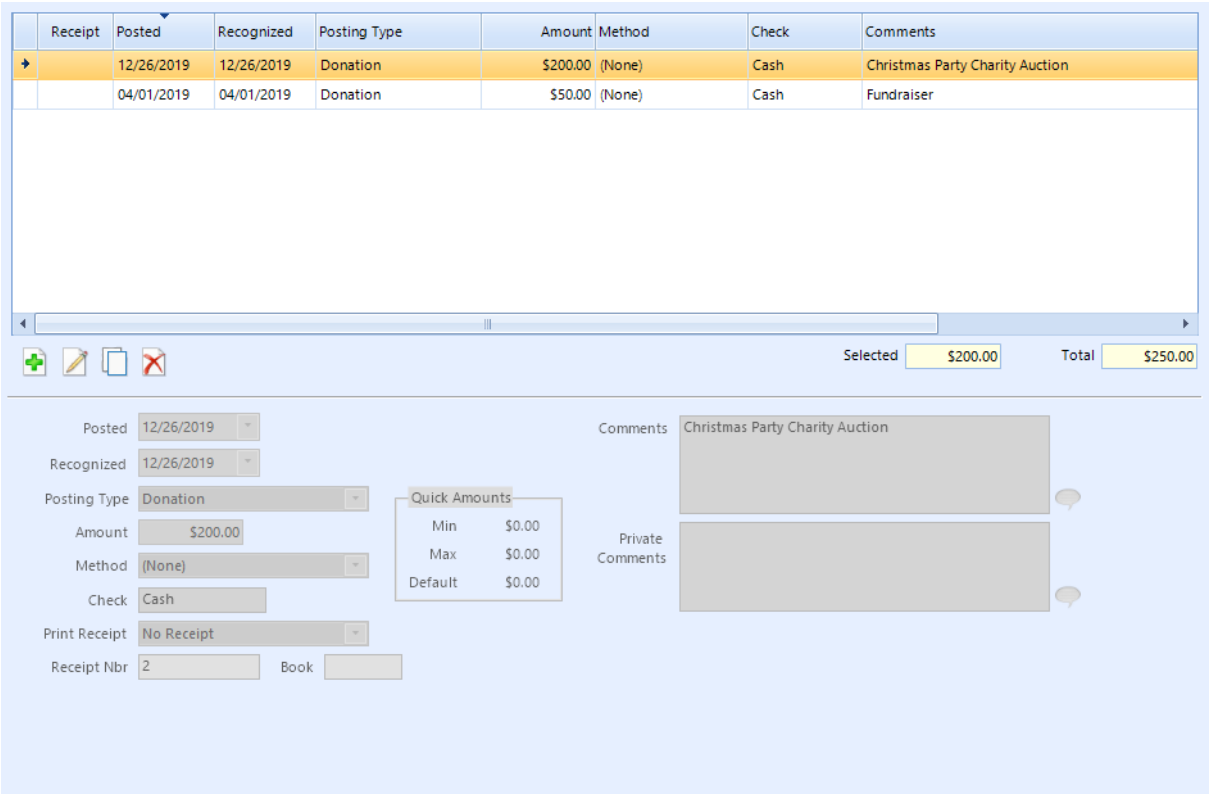
The Donations page is used to record donations or gifts the member has made to the organization that should not be reflected in the Dues account. This page works essentially the same, but separate from, the Dues page. The current account balance is displayed at the bottom of the list, as well as a subtotal of the selected rows.

This page provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

The two fields below the list quickly show balances:

- Selected - sums all selected rows
- Total - sums all rows, selected or not

To create a new record, click Add; or, select an existing record and click Edit, Copy, or Delete.



The following fields are available:

- Posted - the date on which the entry is being recorded
- Recognized - the date on which you want the amount to apply to your organization. Since most activities tend to start and end in a short time period, the date recognized will normally be the same as the date posted. But if you need to prepare for an activity during the latter part of one year but actually account for it the following year, you can use the date recognized to identify these entries. That way, a report run for the first quarter of next year will show an entry that was actually posted the year before.
- Posting Type - the posting type to be applied to this entry

Note: The posting type will be defaulted to the default Donation posting type specified in the Posting Types list, if available. If no default has been set, the type will be blank. See Maintaining Posting Types for more information.

- Amount - The amount to be recorded. Only positive numbers may be used. The posting type determines whether the amount is applied as a debit or credit to the account.

  Note: The Quick Amounts section shows any minimum, maximum, or default amount defined for the selected posting type. These amounts can be quickly entered by clicking the amount.

- Method - the payment method used. See Maintaining Payment Methods for more information.

- Check - the cheque number or other payment identifier

- Print Receipt -controls when a receipt should be printed for the entry:

  - No Receipt - indicates that no receipt needs to be printed at all

  - Mark for Printing - indicates that the record should be marked so that you can run a receipt report from the Reports window, and use Print Receipt as part of your report criteria to print all marked receipts at once.

  - Print on Save - indicates that a receipt will be automatically printed when the OK button is clicked to save the entry. Note that the system will automatically switch the setting to "No Receipt" after printing.

    Note: The "Include on Reports" setting for the member is ignored when printing from within the member record (such as a receipt), unlike printing from the reports window where the flag is applied automatically unless overridden in your search criteria.

- Receipt Nbr/Book - these fields are enabled whenever the selected posting type is one that has been defined to generate a receipt number. The fields are disabled for all other posting types. The Receipt Number is a sequential number generated by the system. The Receipt Book is the value set in preferences.

  Note: The receipt number is not automatically generated until the record is saved or a Receipt is printed via the Receipt button. This ensures that the next receipt number is not used until it is needed.

  Note: if the receipt icon is displayed next to the Book field, it enables you to force the system to generate the next receipt number immediately. Note that once a receipt number has been generated, it is "used" permanently, even if you choose not to save the entry. The only way to reset it is via the Receipt Book Numbers preference. If you want to "regenerate" a new number for an entry that already has a receipt number, you must clear the field first, then click Assign Now to generate a new number. If you do not

want the Assign Now option to be available at all, it can be turned off via the Display Assign Now preference.

- Comments - general comments about the entry
- Private Comments - comments that will not appear on any system report

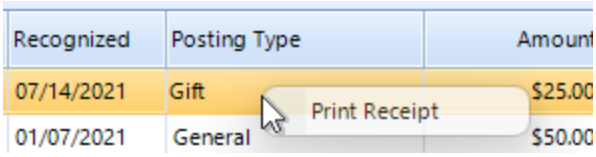
Printing Receipts as a Group

As described above for the, "Print Receipt" field, you have the option of marking many entries for future receipt printing.

If you choose to print a batch of receipts via the Reports window, you will probably want to clear the "Print Receipt" flag from your records. This is not done automatically because the system has no way of knowing whether or not the printing was successful. Your printer may have jammed, been out of ink, printed poorly, used the wrong paper, etc., so you must clear the flag manually. This can be done on the Reports window using the Clear Receipts option on the ribbon.

Additional Donations Capabilities

- If the posting uses a Posting Type that can generate a receipt, you can right-click the entry in the list to print the receipt directly.

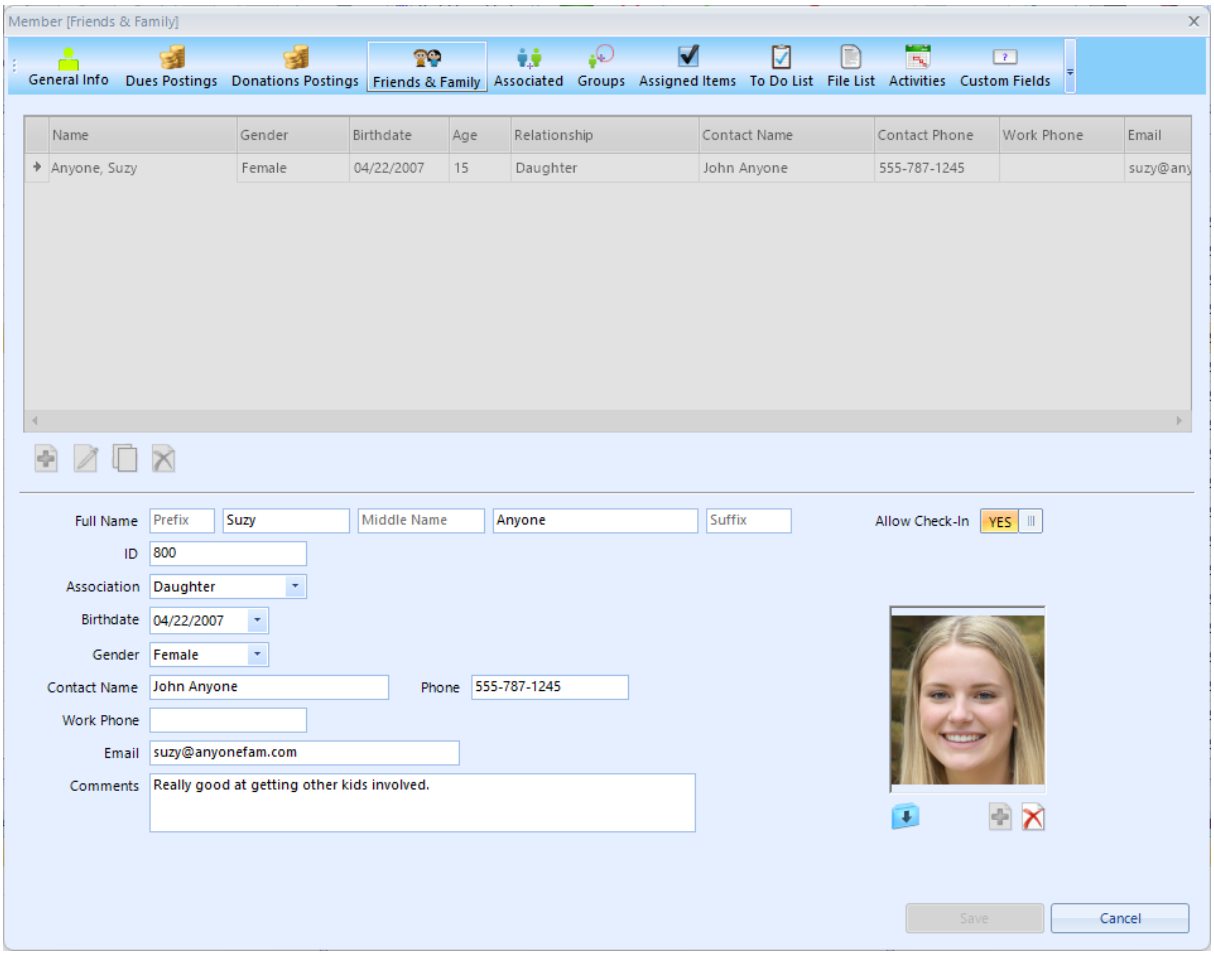


15.14.5 Friends & Family Page

The Friends & Family page contains a list of "people" who are tied to the member record, but do not need to have complete membership records of their own. This often literally means family members, but it could also mean a friend who may one day be interested in the club, or a personal instructor or mentor. These records are referred to as "subordinate to" or "within" the main record, i.e., if the main record is removed, they are removed. Their dues, if applicable, would be part of the main record, etc.

This page provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

To create a new record, click Add; or, select an existing record and click Edit, Copy, or Delete.



The following fields are available:

- Full Name - the prefix, first, middle, last, and suffix parts of the member name. If a single letter is entered for the middle name, the period will be added automatically (i.e., "A" becomes "A.") but if more than one letter is used, a word is assumed and it is not changed (i.e., "Aaron" remains "Aaron").

  The Prefix and Suffix fields can be used for prefixes like "Dr.", "Mrs.", "President", etc., or suffixes such as "Jr.", "2nd", "PhD" or other titles. This data appears with the name on all reports that show the full name.

- ID - is similar to the main record's Member ID, and it defaults to that ID as well. Unlike the main record however, this field can be left blank. If it has a value it can be used when searching for an activity attendee on the activity Front Desk* window.

- Association - the relationship this person has to the main member record (daughter, son, etc.)

- Birthdate - the person's date of birth. Once entered, the Age is calculated automatically.

- Gender - the person's gender

- Contact Name - the emergency contact person. For example, a child may be listed on his father's or mother's record, but if the parent travels a lot, a friend or other guardian may be appropriate.
- Phone - the corresponding emergency contact phone number.
- Work Phone - a work phone number
- Email - a contact email
- Comments - General comments
- Allow Check-In* - controls whether this person may be found in a search for activity check-in via the Front Desk window. This option is selected by default, but it can be turned off.
- Photo - a photo, if available. See Photos for details.

* Professional Version Only

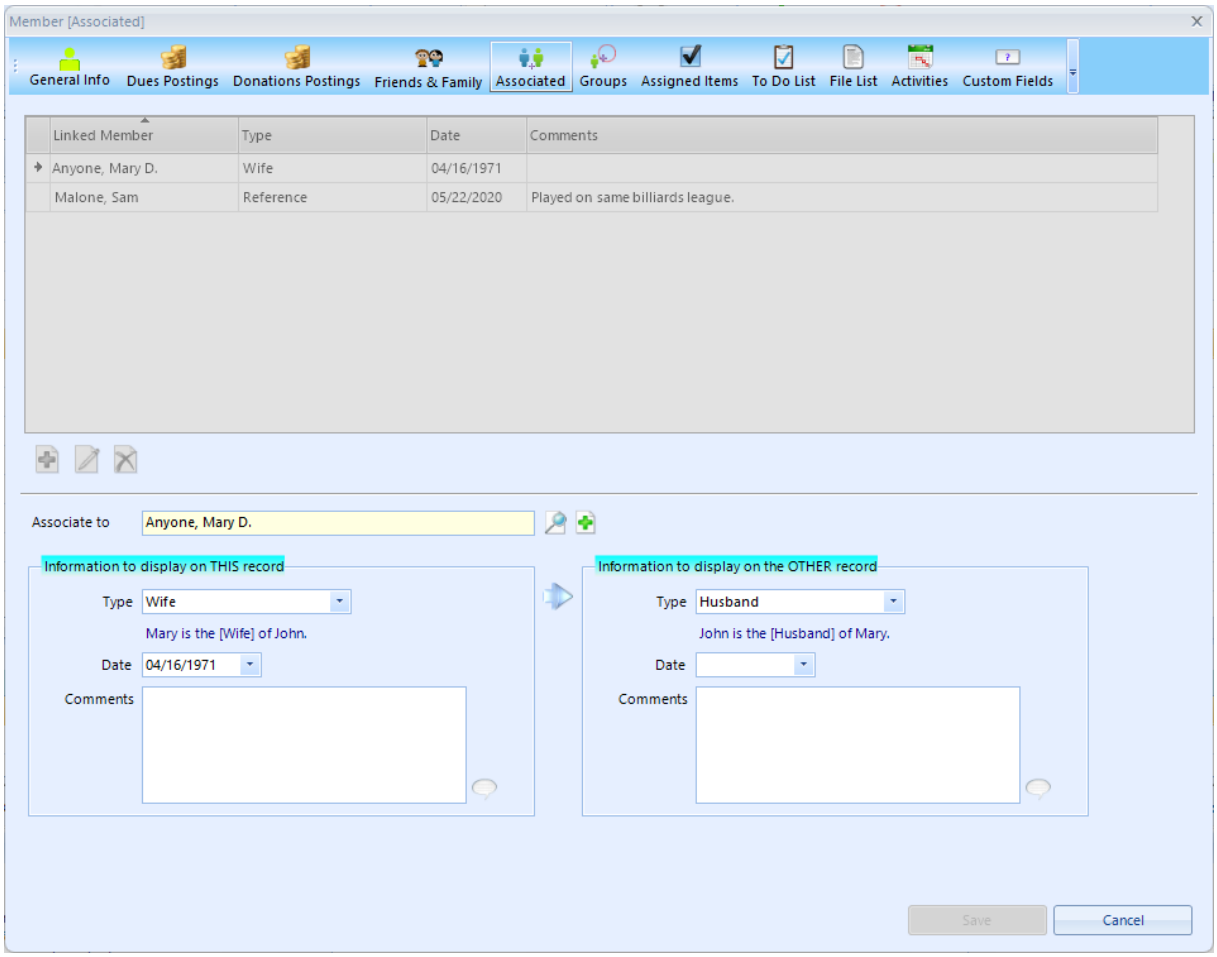
15.14.6 Associated Page

The Associated page displays all membership records that have been linked (associated to) the member. Associated members may be any other member record that is in some way tied to the current member. Typically this includes family members that have their own membership (see Friends and Family also), golf partners, referring members, etc. The key difference associated and friends & family records is that associated members have a complete member record of their own, whereas friends & family records only exist within a member record. See Friends and Family for details.

This page provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

To create a new record, click Add; or, select an existing record and click Edit, or Delete.

Note: If this record was opened from within another member record, limited changes can be made.



The following fields are available:

- Associate To - choose either the Search or Add icon to create the association
  - o Choose Search open the Member Search window to find an existing record to associate to this one
  - o Choose Add to create a new member record to associate to this one
- Information to display on THIS record
  - o Type - the way the selected "Associate To" record relates to the current record. See Association Types for details.
  - o Date - the date of the association, if applicable
  - o Comments
- Information to display on the OTHER record

- Type - the way this record relates to the selected "Associate To" record. See Association Types for details.
- Date - the date of the association, if applicable
- Comments

Note: You can open an associated member record directly from the list. Right-click a member in the list and choose "Open Member" from context menu.

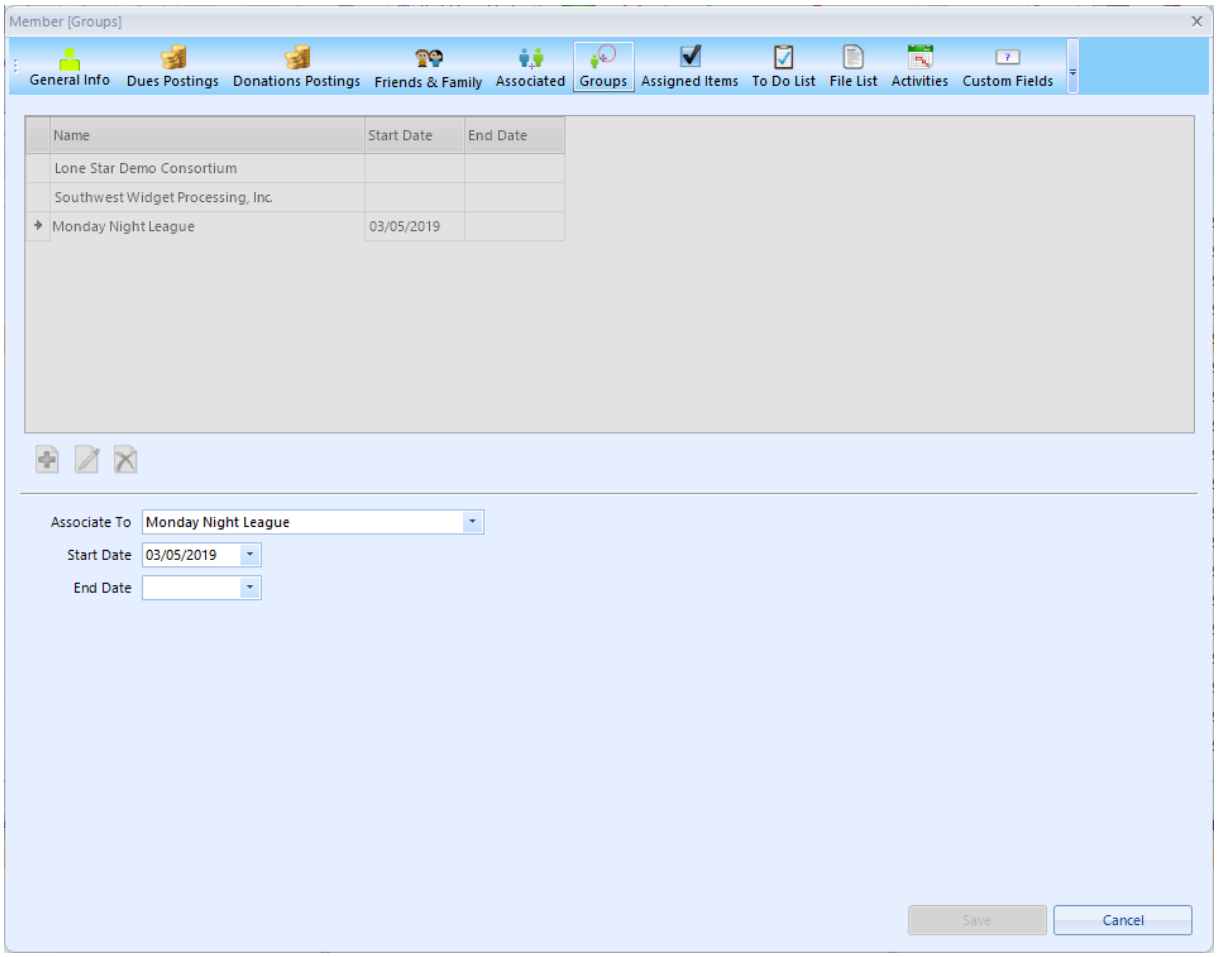
15.14.7 Groups Page

The Groups page displays all group records that have been linked (associated to) the member. Associated groups are typically committees, teams, etc., to which the member belongs.

The member will appear on the Membership page of each respective Group record shown on this list.

This page provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

To create a new record, click Add; or, select an existing record and click Edit, or Delete.



The following fields are available:

- Associate To - select the group to use
- Start Date - an optional start date for the group membership
- End Date - an optional end date for the group membership

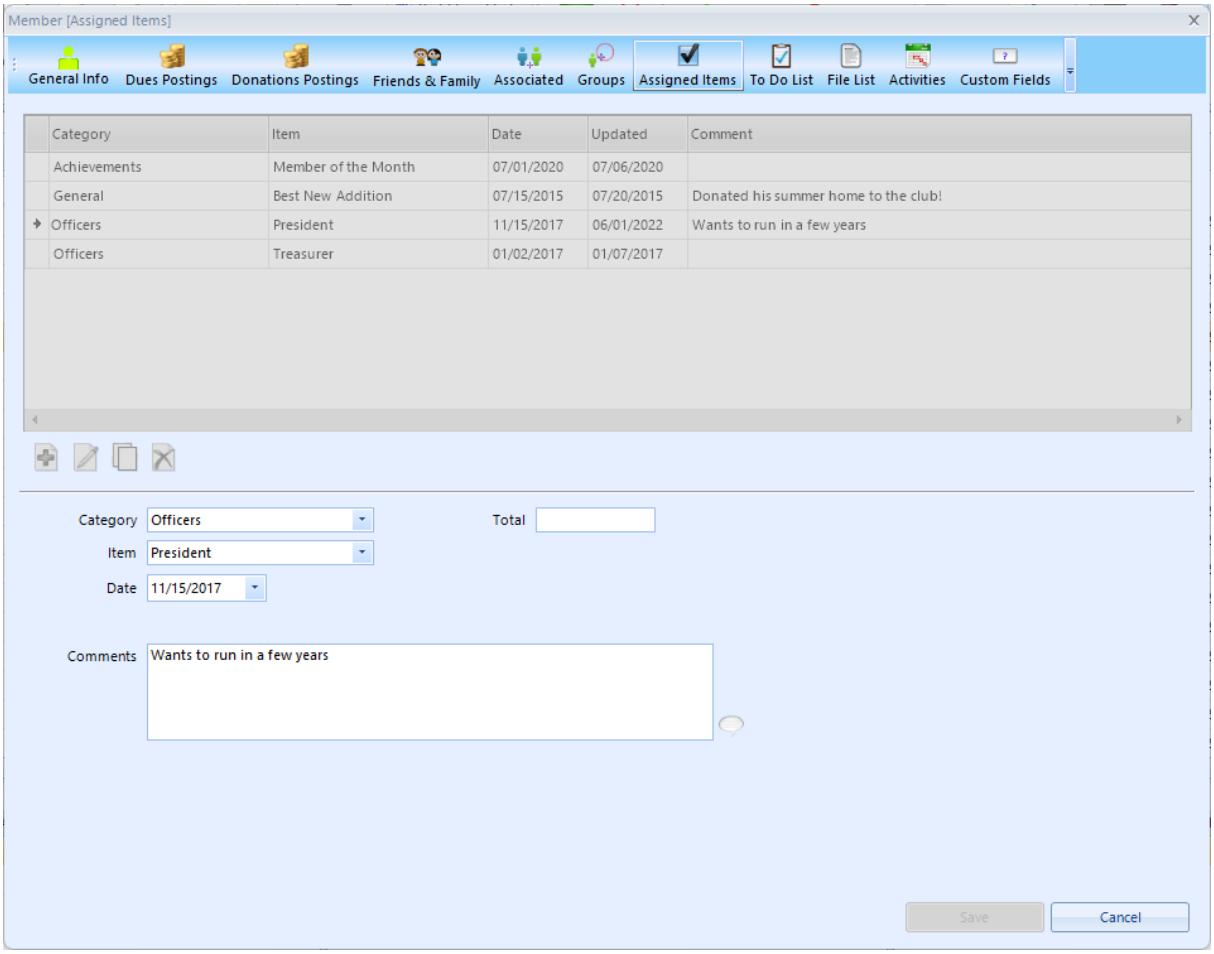
Note: If the member was opened from the membership page of a Group window, that group cannot be modified here.

15.14.8 Assigned Items Page

You can create a system of categories and items that can be assigned to members and groups (or both). This page contains enables management of assigned items for a Member. See Categories & Items for details about setting up categories and items.

This page provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

To create a new record, click Add; or, select an existing record and click Edit, Copy, or Delete.



The following fields are available:

- Category - lists all categories available to Members. This selection controls the available Items.
- Item - lists all items available for the selected Category
- Date - a date to associate with the assignment
- Comments - general comments for the assignment

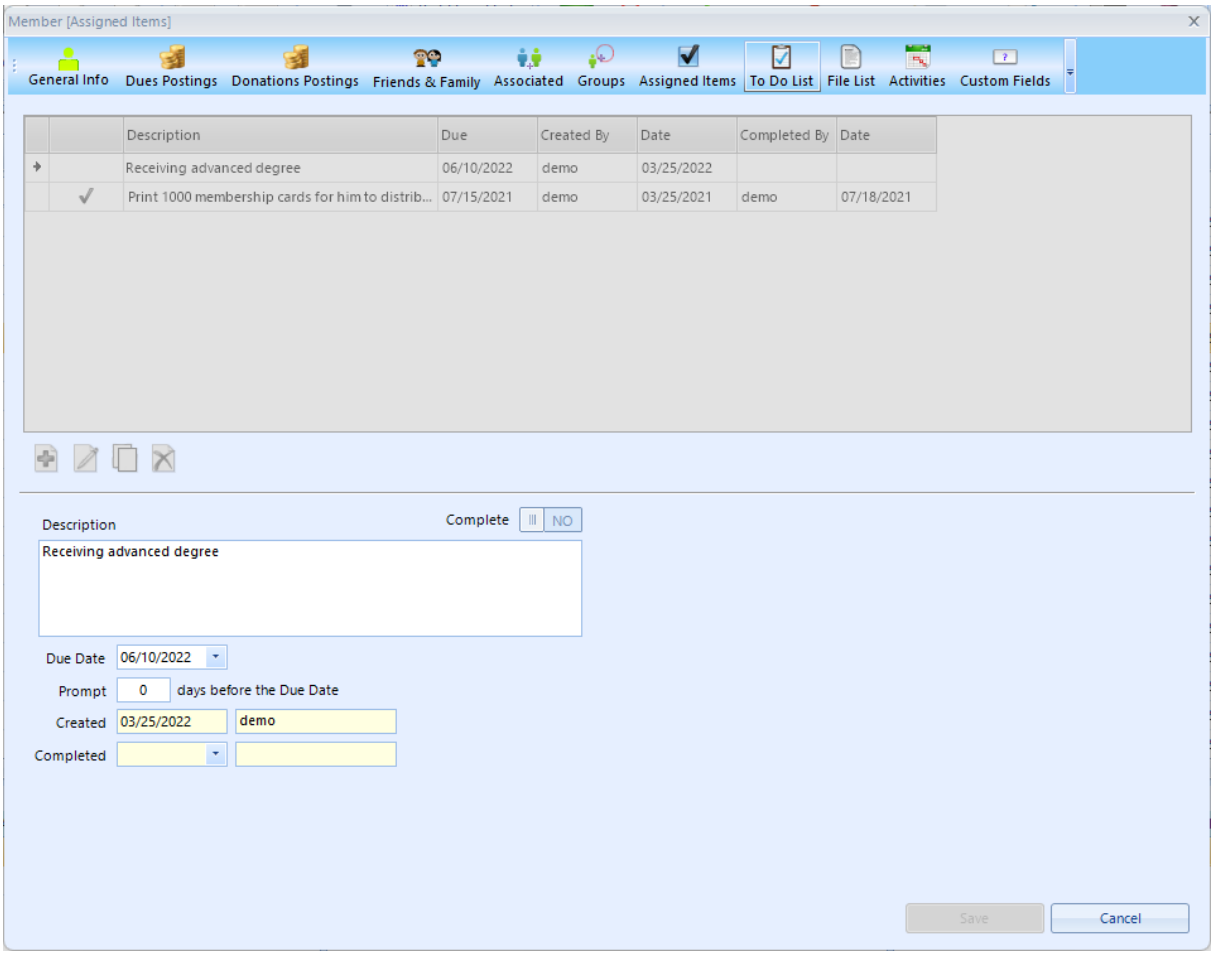
Note: In this example, we've activated one of the optional numeric fields, and named it "Total" so that it is available when adding items. See Categories & Items for details.

15.14.9 To Do List Page

To-Do lists enable you to track anything you need "to do" related to a member.

This page provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

To create a new record, click Add; or, select an existing record and click Edit, Copy, or Delete.



The following fields are available:

- Description - the thing "to do"
- Complete - indicates the item has been completed. Turning this on will automatically set the Completed Date to the current date.
- Due Date - the date the item will appear on the To Do list that displays at log in (assuming the Prompt days is left as zero)
- Prompt N days before the Due Date - causes the item to appear on the To Do list that displays at log in the specified number of days before the Due Date
- Created Date/By - the date and user name of the user who first added the To Do item

- Completed Date/By - the date and user name of the user who completed the To Do item. Note that the date can be modified if necessary (for example, if you forget to go in and mark an item completed for a couple days after the actual due date)

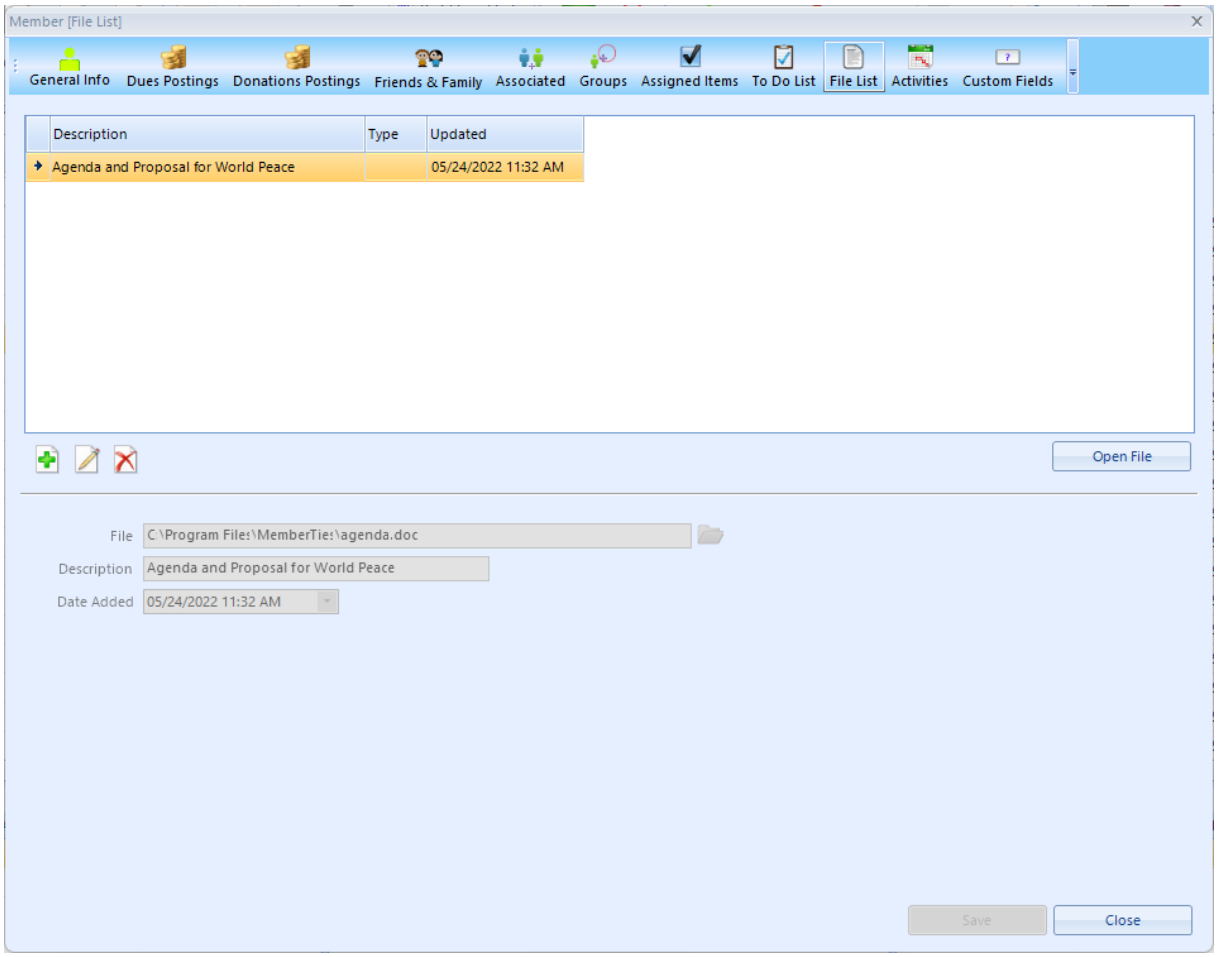
15.14.1(File List Page

You can link one or more files to a member. This is convenient for things like ledgers, notes, maps, or any other file stored on your PC.

Note: Any file stored on your computer can be associated with the record. The file is either stored as a link to the physical file, or stored in the database, depending on the File & Photo Storage database preference. If you are storing files and photos in the database, be sure to keep file sizes as small as possible to avoid dramatically increasing the database size.

This page provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

To create a new record, click Add; or, select an existing record and click Edit, or Delete.



The following fields are available:

- File - click the folder icon to the right of the field to select a file from your computer or network. After selecting, the system will try to use the file name as the description, and the full path will appear in the field.
- Description - you can keep the suggested name or enter your own description for the file
- Date Added - defaults to the current date, but can be changed.

When you save your changes, the system checks your File and Photo Storage preference. If the preference is set to store the file in the database, the file size is checked against the limit set in the preference, and if acceptable, the file is converted, stored and "(Database)" displays as the new file name to indicate the storage location. If the preference is set to keep the file on your computer, the full path will remain.

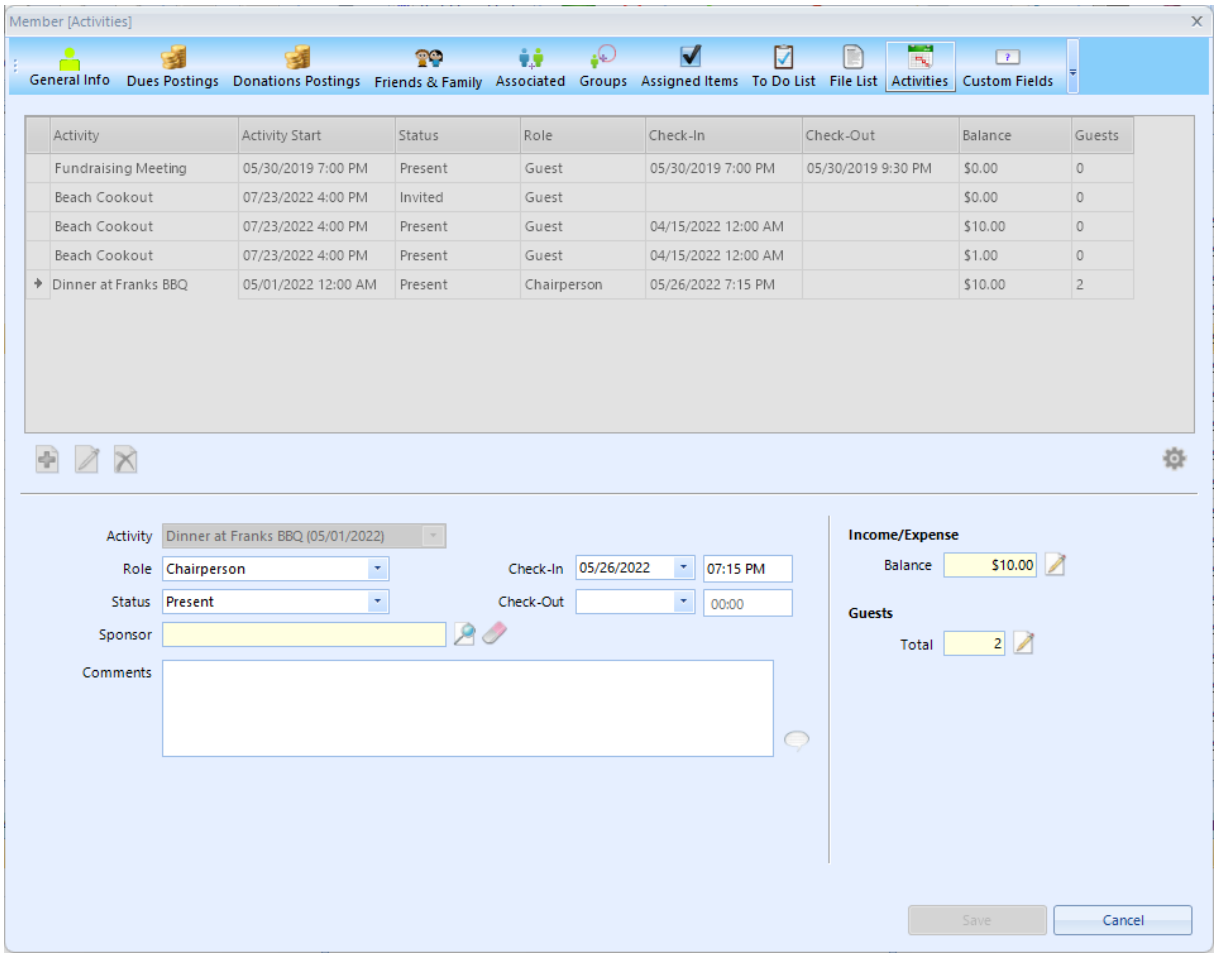
Note: If a record is deleted from the File List it will not affect a physical file located on your computer. The deletion only removes the database record.

15.14.11 Activities Page

With MemberTies Professional, an additional page appears on the membership record for activities. The Activities page contains a list of all activities to which the member has been entered as an attendee. Clicking any activity enables modification of everything about the attendance entry, including postings and guests.

This page provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

To create a new record, click Add; or, select an existing record and click Edit, or Delete.



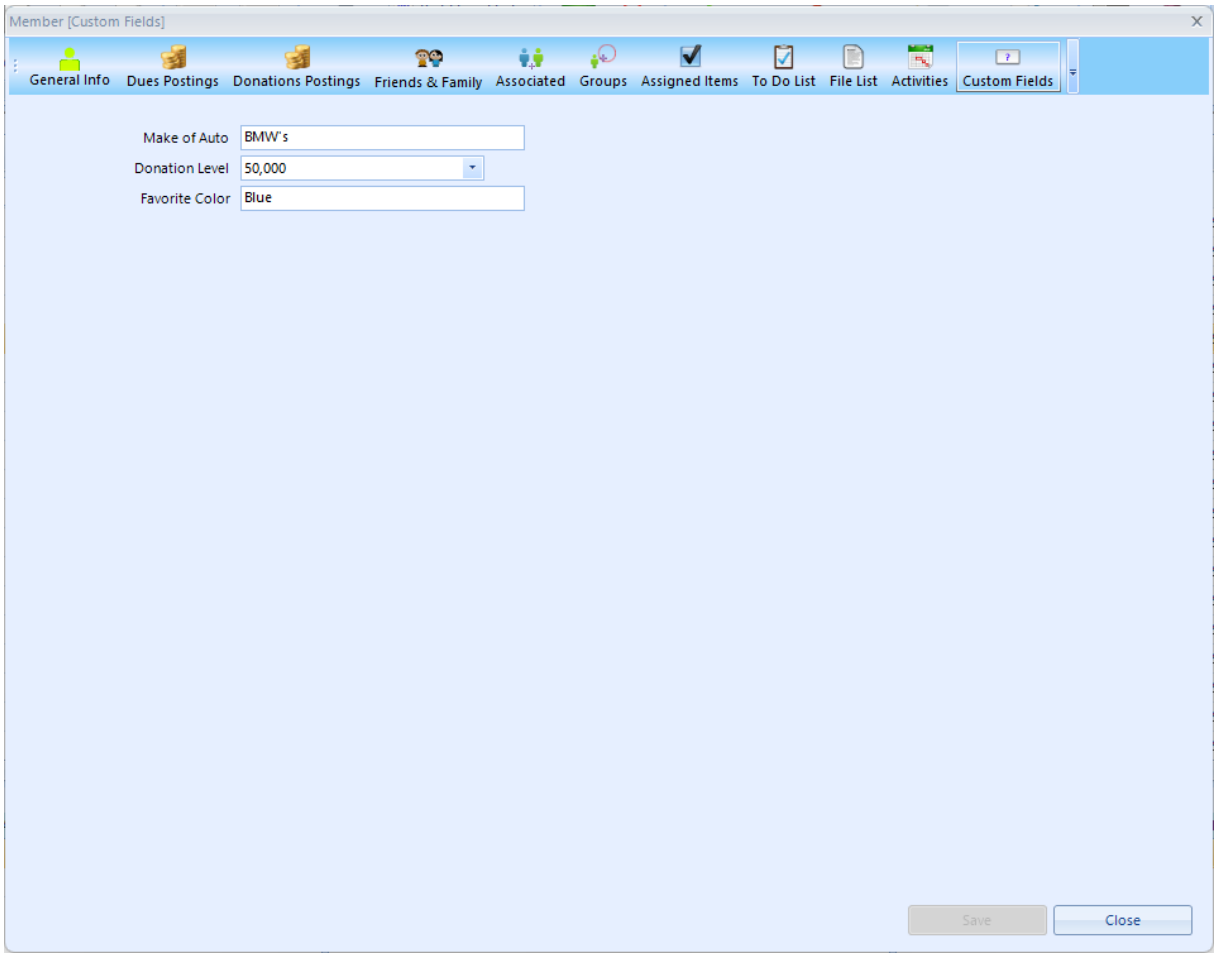
In this example we can see that the member was the chairperson for the activity, has a $10.00 balance and brought two guests. Clicking the Edit icon for the Balance or Guests will open the details for each.

This is essentially the same page used for the Attendance page used on an Activity record. Please see Activity Attendance for details.

Note: If the member was opened from the attendance page of an Activity window, that attendance record cannot be modified here.

15.14.1 Custom Fields Page

Custom fields can be used for nearly any sort of data you wish, and they can be customized to become lists, editable lists, switches, currency, dates, and ordinary text fields.



You can create up to 50 custom fields, and you can choose where and how they will be used and displayed. This example shows simple text fields, and they're actually at the top of the first of two possible "columns" of custom fields. If you actually define all 50 fields, a scroll bar will also appear so you can get to them all.

See Maintaining Custom Fields for information about adding or changing custom fields.

Part XVI

Lists (Dropdown Lists)

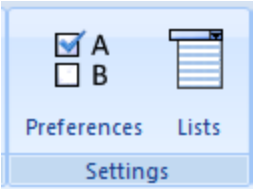
16 Lists (Dropdown Lists)

16.1 Overview

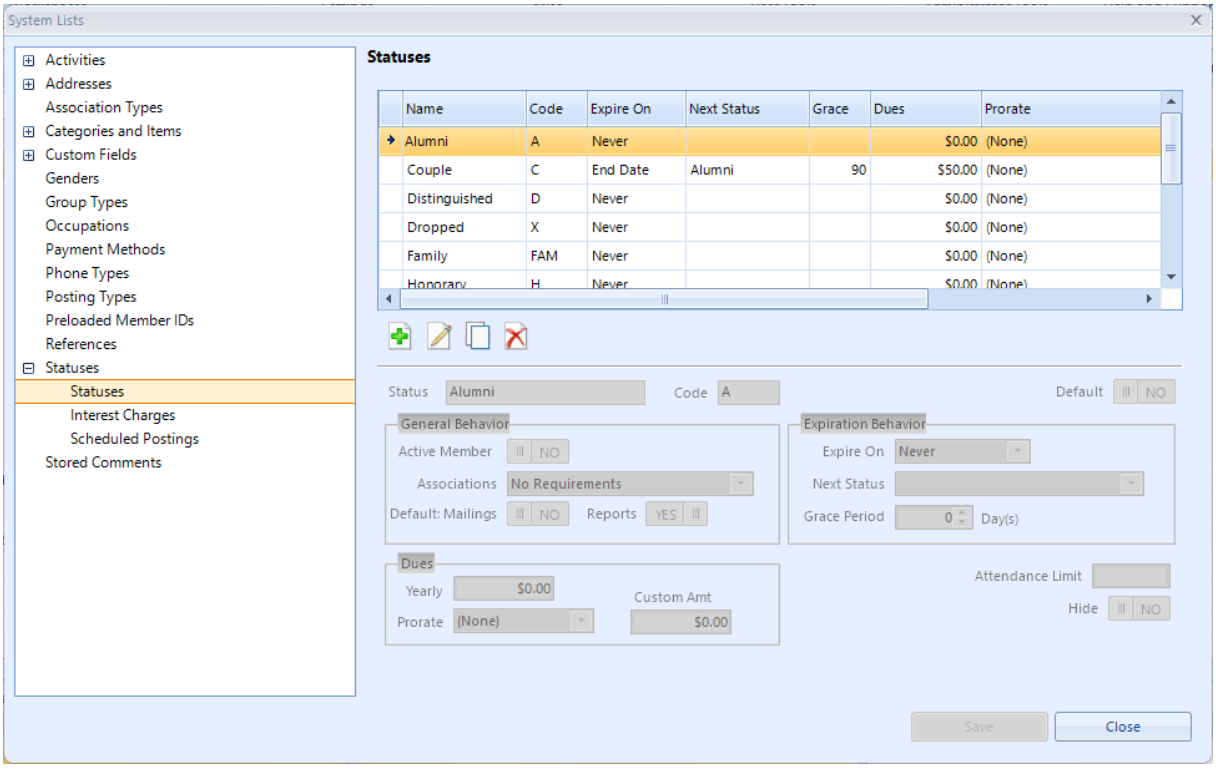
Almost every dropdown list in MemberTies can be customized to meet the needs of your organization. The most common list that needs changes is the Statuses, which almost always needs additional entries to match the terms used by your organization.

While you can add a new entry to some lists by selecting the "<New>" option in the list, the main System Lists tool is the primary location for working with data for any list.

The System Lists window is accessible via the Lists button in the Settings section on the Home ribbon.



The System Lists window enables you to work with the data for any list in the system. Just choose the desired list on the left side, and the list contents and editing fields will display on the right side. A standard dual view of data is used, showing the list of existing records on the top, and the details below. See Editing Records for more information.



Since there are a large number of lists, some are grouped together to make the window more usable. For example, Statuses have three lists: one for the status itself, one for interest charges, and one for scheduled postings. This is also a list that has a kind of hierarchy, i.e., you have to create a status in the Statuses list before you can use it in the Interest Charges or Scheduled Postings lists.

16.2 Merging/Combining Values

Some lists allow you to combine two or more values into one.

A common reason for doing this is to correct bad or similar spellings of the same word. For example, suppose you have a number of members assigned to the city, "My Town", and several others assigned to, "My Towne." If you open the City list and change "My Towne" to "My Town" by renaming the incorrect version, you'll find that the list now shows two seemingly identical entries. However, to the database they are completely different. Here's why:

The database identifies these records by an internal ID number. So previously, you had:

```
My Town - ID: 34
My Towne - ID: 41
```

After you renamed it, you were left with:

```
My Town - ID: 34
My Town - ID: 41
```

You never knew about these internal IDs, and don't have a reason to care about them. But, as far as the database knows, it still has an "ID 34" and an "ID 41" record, they just both happen to display as "My Town." It only cares about the IDs.

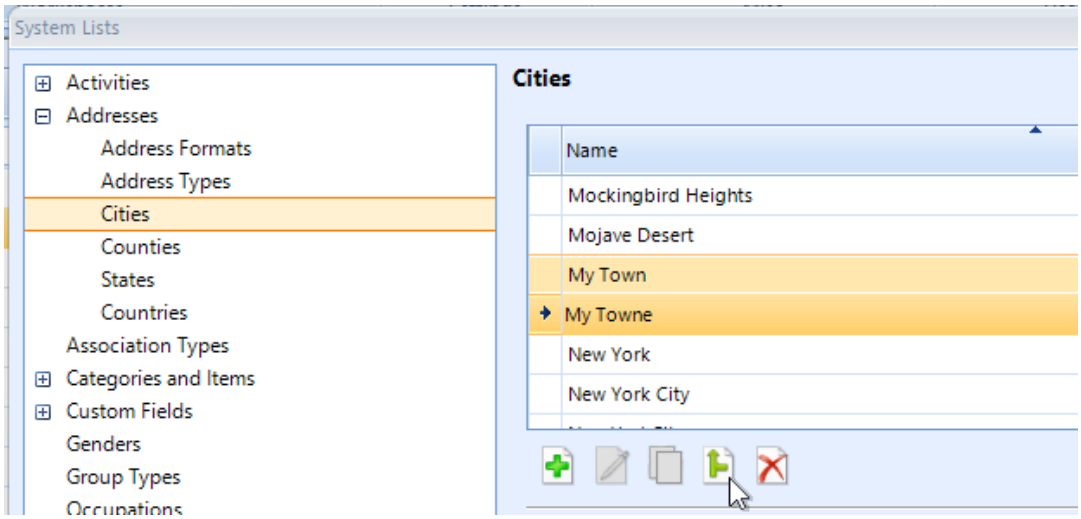
That means if you use the city as report criteria, and choose "My Town", you may or may not get all the records you'd expect. That's because choosing the first entry really means, "find everyone with a city of '34'", and choosing the other one means, "find everyone with a city of '41'".

The way to correct this is to tell the database to merge the values into one so you're left with only one "My Town" entry. Merging tells the system to find every record where the city is EITHER 34 or 41, and change them to point to a single value.

To Merge Records

If the list you open allows merging, the Merge will be displayed, and it will be enabled as soon as two or more record are selected.

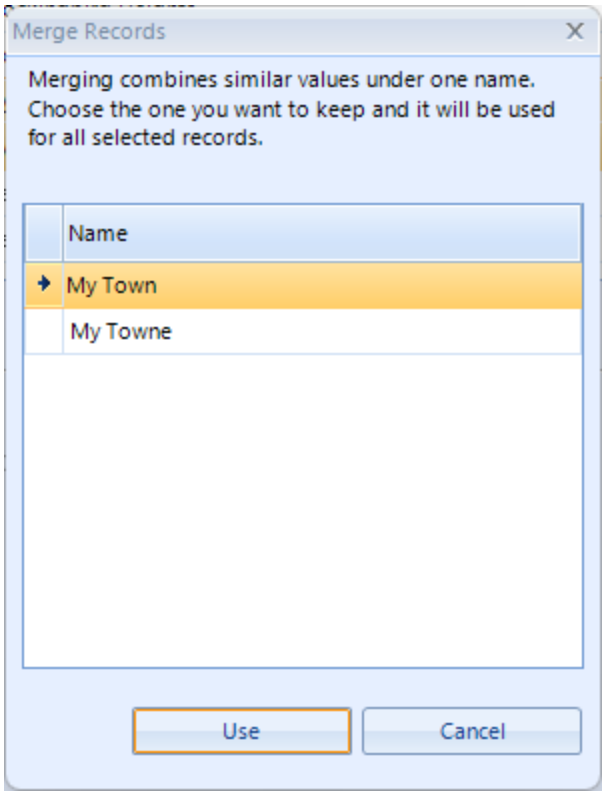
1. Select two or more records to merge.



2. Click the Merge icon below the list.

   Note: The record to merge "to" must already exist, so create it first if necessary. In other words, if in this example we wanted to combined these values to a new value called, "Charity Event" we'd have to create that first because it isn't in the list already. In this case, we're going to combine everything into a value that is already in the list.

3. On the Merge Records window, choose the version you want to keep.



4. Click Use.
5. The system will convert every record to use the selected entry, and will return to the original list. The "unwanted" record(s) will no longer be shown.

   In this case, all records with a city of, "My Towne" were changed to "My Town."

16.3 Activities

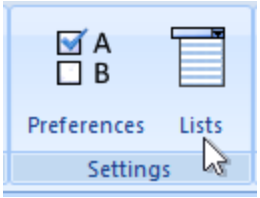
16.3.1 Activity Locations

Locations are used with Activities to specify where the activity taking place. Since Locations are more than just place names, they are maintained separately for easy reuse.

Note: You cannot delete a location if it is used on a record; however, you can make it Inactive, which will prevent it from displaying in the selection list when creating new activities. (If an existing activity is using the location and the location is made inactive, it will still show on the existing activity, but if the location is subsequently changed, the inactive location will not be available for reselection.)

Maintaining Activity Locations

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, expand the Activities section.
3. Choose Activity Locations.
4. Modify the list as needed. The following fields are available:
   - Name - The name of the location, i.e., "Palace Hotel", "Bob's House", "City Park", etc.
   - Code - the code is an abbreviation for the activity that can be used on lists or reports when space is at a premium
   - Type - lists available location types defined in the database. See Location Types for more information.

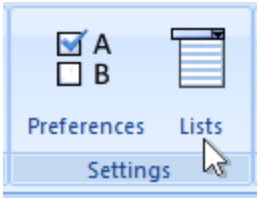
- Active - Indicates whether the location is active and available for new activities. You can use this option to remove a location that is in use on existing activities, since it cannot be deleted.
- Description - A description of the location. This could be used for the address or other basic details.
- Comments - General comments about the location, i.e., "Unavailable on major holidays", or "Hours: M-F 8:00 -12:00"

16.3.2 Activity Location Types

Location Types enable you to categorize locations according to their type of business, usage, or any other appropriate designation. Typical location types are, "restaurant", "home", "park", "apartment", etc., but they could also be things like, "Free", "Rsv. Reqd", "Private", "Public", etc.

Maintaining Activity Location Types

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, expand the Activities section.
3. Choose Activity Location Types.
4. Modify the list as needed.

Combining Values

Entries on this list can be combined into one. See Merging/Combining Values for details.

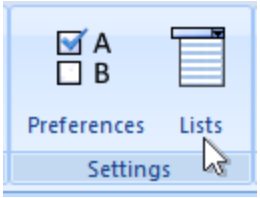
16.3.3 Activity Roles

Activity Roles enable you to describe the role played by a given attendee with regard to an activity. Typical roles may be, "Host", "Greeter", "Facilitator", "Bartender", "Usher", etc. They typically represent things people "do" at an activity.

Note: You cannot delete a record that is in use. One solution is to create an entry called, "Undefined" or "Unknown" and merge the unwanted entries into that one.

Maintaining Activity Roles

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, expand the Activities section.
3. Choose Activity Attendance Roles.
4. Modify the list as needed.

Combining Values

Entries on this list can be combined into one. See Merging/Combining Values for details.

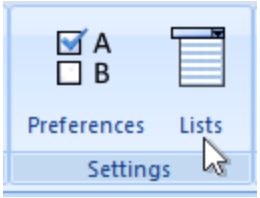
16.3.4 Activity Types

Activity Types enable you to quickly identify certain kinds of activities, by using types like "Fundraiser", "Party", "Luncheon", etc.

Note: You cannot delete a record that is in use. One solution is to create an entry called, "Undefined" or "Unknown" and merge the unwanted entries into that one.

Maintaining Activity Types

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, expand the Activities section.
3. Choose Activity Types
4. Modify the list as needed.

Combining Values

Entries on this list can be combined into one. See Merging/Combining Values for details.

16.3.5 Attendance Statuses

Attendance Statuses enable you identify whether members associated to an activity attended, declined, canceled, etc. For example, you might set the default attendance status to be "Invited" so that new attendees will automatically be given that status. Then, after the activity takes place, you can use the sign-in sheet from the activity to change the appropriate members to "Attended" and the no-shows to "Absent."

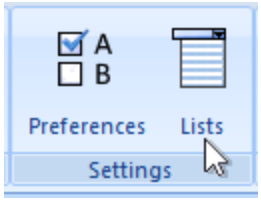
The status also controls whether an attendee with that status will appear on activity reports.

Note: Attendance Statuses are in no way related to membership statuses.

Note: You cannot delete a record that is in use. One solution is to create an entry called, "Undefined" or "Unknown" and merge the unwanted entries into that one.

Maintaining Attendance Statuses

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, expand the Activities section.
3. Choose Activity Attendance Statuses
4. Modify the list as needed. The following fields are available:
   - Name - the name of the attendance status.
   - Attendee - indicates whether an attendee with this attendance status should be considered reportable. If an attendee has a status that is not reportable, they will not appear on any report that includes attendee data. This enables you to list a non-attendee with a Declined or Absent status for your records, without that person appearing on an attendance report.
   - Default - indicates whether the entry is the default for new attendance records

Combining Values

Entries on this list can be combined into one. See Merging/Combining Values for details.

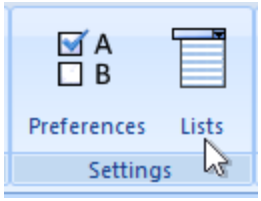
16.4 Addresses

16.4.1 Address Formats

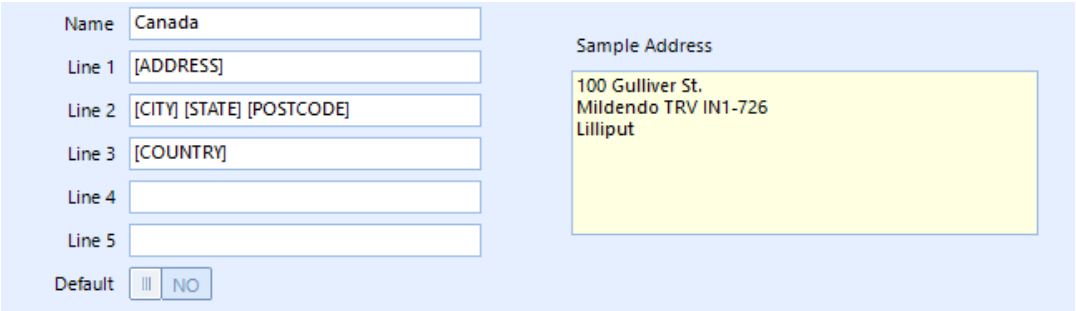
The way an address is displayed is based on the Country on the address, and you can adjust the format as needed using various keywords.

Maintaining Address Formats

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, expand the Addresses section.
3. Choose Address Formats.
4. Each address format is composed of five address lines:



5. Modify the list of formats as needed. The following fields are available:
   - Name - the name to use for the format
   - Line 1 - 5 - each address can have up to 5 lines of data. If you do not enter anything on a line, it will not be used (however, do not "skip" a line)

     Any one or more of the following keywords can be entered on a line, exactly as shown including the [brackets], or the line can be left blank:

     - [ADDRESS] - will be replaced with the street address
     - [CITY] - will be replaced with the city name
     - [STATE] - will be replaced with the state/province abbreviation
     - [COUNTY] - will be replaced with the county name

- [POSTCODE] - will be replaced with the ZIP/Postal Code
- [COUNTRY] - will be replaced with the country name

- Default - indicates the default address format to be used for any country without a defined format

The Sample Address area shows a representation of how the address will appear. Be sure to include any spaces, punctuation, etc., as needed in the format. Only the bracketed value will be replaced when the format is used; everything else is reproduced as-is.

16.4.2 Address Types

Address types are primarily used when you have multiple addresses on a record, to differentiate between them when querying data for reports. For example, having an address type of "Home" and another type of "School" makes it easy to search for all members who live in a given city, vs go to school in a given city.

For example:

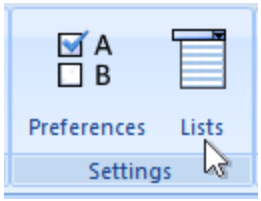
```
State = TX and
Address Type = Home
```

will find members who live in Texas, but will ignore members who might have a university address there.

Note: You cannot delete a record that is in use. One solution is to create an entry called, "Undefined" or "Unknown" and merge the unwanted entries into that one.

Maintaining Address Types

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, expand the Addresses section.
3. Choose Address Types
4. Modify the list as needed.

Combining Values

Entries on this list can be combined into one. See Merging/Combining Values for details.

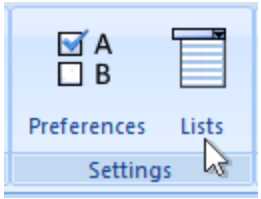
16.4.3 Cities

Cities are available to all address records.

Note: You cannot delete a record that is in use. One solution is to create an entry called, "Undefined" or "Unknown" and merge the unwanted entries into that one.

Maintaining Cities

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, expand the Addresses section.
3. Choose Cities
4. Modify the list as needed.

Combining Values

Entries on this list can be combined into one. See Merging/Combining Values for details.

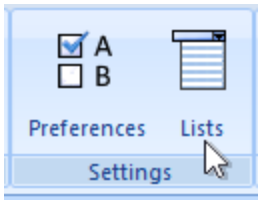
16.4.4 Counties

Counties are available to all address records.

Note: You cannot delete a record that is in use. One solution is to create an entry called, "Undefined" or "Unknown" and merge the unwanted entries into that one.

Maintaining Counties

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, expand the Addresses section.
3. Choose Counties

4. Modify the list as needed.

Combining Values

Entries on this list can be combined into one. See Merging/Combining Values for details.

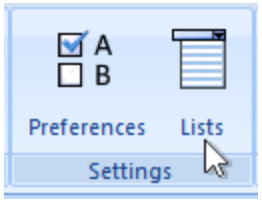
16.4.5 Countries

Countries are used on all address records. We tried to include all known countries by default, but there may be occasions where you need to change an existing entry, or add a new one.

Note: You cannot delete a record that is in use.

Maintaining Countries

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, expand the Addresses section.
3. Choose Countries
4. Modify the list as needed.

   Note: The list of Address Formats can be managed here.

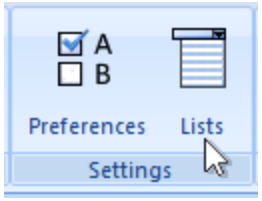
16.4.6 States

States are available to on all address records. For areas where the value is not applicable, the state can be left blank.

Note: You cannot delete a record that is in use.

Maintaining Counties

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, expand the Addresses section.
3. Choose States
4. Modify the list as needed.

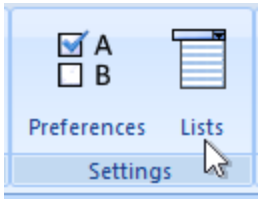
16.5 Association Types

Association types enable you to further identify the type of association that exists between two membership records. You are allowed to specify the type as seen from both sides, i.e., "Joe is Jane's Husband", "Jane is Joe's Wife", therefore it is good to create opposite entries.

Note: You cannot delete a record that is in use. One solution is to create an entry called, "Undefined" or "Unknown" and merge the unwanted entries into that one.

Maintaining Association Types

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, choose Association Types
3. Modify the list as needed.

Combining Values

Entries on this list can be combined into one. See Merging/Combining Values for details.

16.6 Categories and Items

16.6.1 Categories

Categories and their associated Items are designed for tracking the "one to many" relationships between your members and "whatever." In other words, most fields only allow a single value, i.e., you can only enter one status, one occupation, one entry in a given custom field, etc.; but, a member can be assigned any number of Items any number of times.

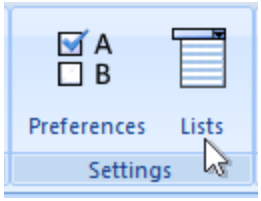
This provides a flexible way of tracking things members (or groups) may have more than one of, such as achievements, awards, officer positions, duties, pledges, etc. They can be used very creatively to track all sorts of information.

Perhaps your organization presents various awards to its members. You could create a category called "Award" and items associated to it like, "Member of the Month", "Queen", "1st Place", "Top Bidder", "Most Valuable Player", "Record Sales", etc. Then when member "John" wins the "Top Bidder" award, you can open his record, and add an entry for the "Top Bidder" item. If he also wins the "Record Sales" award a few months later, you can simply add another item under the category of "Award" for "Record Sales".

Categories and Items are related to each other, so a category must exist before you can create items under it. A category can be defined as available to Group records, Member records, or both.

Maintaining Categories

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, expand the Categories and Items section.
3. Choose Categories.
4. Modify the list as needed. The following fields are available:
   - Name - the name of the category
   - Available To - indicates what type of record can be assigned the category

     Note: When changing an existing category, you cannot change the availability if doing so would invalidate items that are associated to the category and assigned to membership or group records. For example, if the category was initially available to All Records, you cannot change the availability to be only Membership Records after it has been used on a group record, because the Item would become invalid.

     You can always increase the availability scope, but you can't decrease it once items for the category have been used on records.
   - Sort Order - the ranking of this category within other categories. The sort order is used on the Assigned Items report. If no sort order is specified, the order is assumed to be 0 (zero). All categories with a sort of zero will sort alphabetically within themselves.

     Note: When setting Sort Orders, it is a good idea to use increments of 5 or 10, so you have room to add another entry within the list. For example, if you have three

entries, sort them as 10, 20, 30, instead of 1,2,3. That way, a new entry can be inserted between the first and second by giving it a sort order of 15.

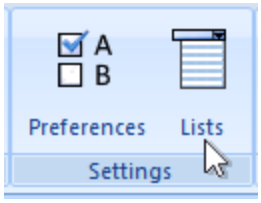
Note: If you delete a category that has associated items, all of those items will also be deleted and likewise will disappear from all member or group records that used them.

16.6.2 Items

Items are the real "meat" of Categories and Items. These are the things that are assigned to members and groups. The categories are just there to help keep them organized.

Maintaining Items

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, expand the Categories and Items section.
3. Choose Items.
4. Modify the list as needed. The following fields are available:
   - Name - the name of the Item
   - Available To - indicates what type of record can be assigned the item, and therefore what categories it can appear under.
   - Category - the category under which the item will appear. This is controlled by the availability, i.e., a member item cannot appear under a group category.
   - Sort Order - the ranking of this item within other items on the selected category. The sort order is used on the Assigned Items report. For example, if you use a category called Officers, you can use this option to ensure that the "President" item always prints above the "Vice President" item.

     Note: When setting Sort Orders, it is a good idea to use increments of 5 or 10, so you have room to add another entry within the list. For example, if you have three entries, sort them as 10, 20, 30, instead of 1,2,3. That way, a new entry can be inserted between the first and second by giving it a sort order of 15.

- Comment - general notes about how the item is intended to be used. These comments only appear on this window and are for your own information. You might want to enter the date it was created, or your initials.
- Active - If you do not want the Item to be usable yet, turn off the Active switch. An inactive item will not appear in the selection list when adding new items to a membership or group record. However, the item will still appear on any records that were assigned the item when it was still active.

Note: If an item is deleted, it is removed from any member/group records that were using it. To stop using an item without deleting it, turn off the Active switch.

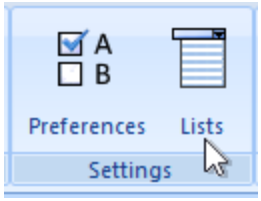
16.6.3 Item Labels

There are several fields you can choose to show or hide. If you make them active, they will appear on the item detail area when assigning it to a member or group.

These fields/labels apply to all items. They cannot be made group or member-specific, and only the label text and active status can be modified.

Configuring Labels

1. On the Home ribbon, choose Lists from the Settings section.



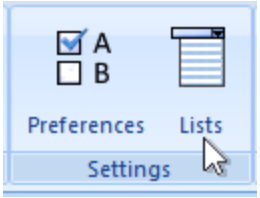
2. On the System Lists window, expand the Categories and Items section.
3. Choose Item Labels.
4. Modify the list as needed.

16.7 Custom Fields

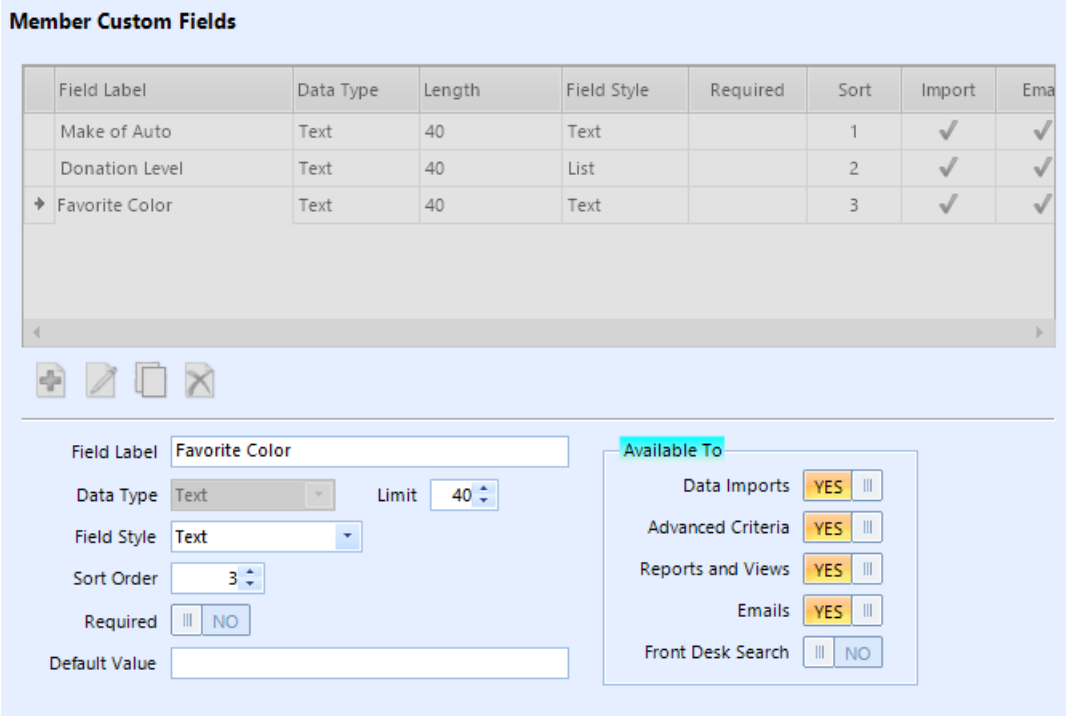
Any number of custom fields can be defined for membership records or group records. Custom fields can be used to store virtually any kind of data you wish. You can specify the label that will appear for the field, the type of data to be stored, how it will be displayed, and how the field can be used.

Maintaining Custom Fields

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, expand the Custom Fields section.
3. Choose Member Custom Fields or Group Custom Fields as appropriate.



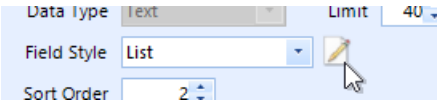
4. The following fields are available:
   - Field Label - the label that will appear next to the data entry field
   - Data Type - data type determines the kind of information that the field will store:
     - Text - This is the default data type. A text field can hold up to 40 characters of alphanumeric data. Text data types can be displayed as a standard field, a list, or a switch.
     - Date - A date field stores a full date, including month, day, and year, in the same format as other date fields in the system (it uses the Short Date format defined for your computer Regional Settings). Date data types can only be displayed as a standard field for a single value.

  - Number - A number field stores up to a 9 digit number, with no decimal places. Number data types can be displayed as a standard field, or a list.
  - Decimal - A decimal field stores up to a 7 digit number, followed by 2 decimal digits (i.e., 1234567.89).
  - Currency - for monetary values, this which will cause the field to display using the Currency format defined for your computer Regional Settings.
- Limit - for text and numeric fields, the maximum number of characters or digits that can be entered
- Field Style - controls the way the field will interact with the user (you).
  - (default) - a standard field that accepts the data of the selected type. i.e., a standard text, numeric, decimal, or date field. Use this type when the entry doesn't have to be controlled at all.
  - List - A list filled with the values you specify. A selection must be made from the values in the list, or the field must be left blank (unless marked as required). Use this type when you want to require a specific entry to ensure consistent data. One list item can be selected as the default value to be used automatically on new records.
  - List (Editable) - Identical to the List type, except the user can type an entry that is not one of the choices in the list. Typing a new entry doesn't change the available list values. (Think of it as an override entry.) Use this format when you want the list to provide basic choices, but need to allow for unforeseen entries. One list item can be selected as the default value to be used automatically on new records.
  - Checkbox - this option is only available when the Data Type is Text. A "checkbox" displays as the Yes/No switch.
- Sort Order - indicates the order on the screen (top to bottom) in which the field will appear for data-entry.
- Required - indicates that the field must always have a value. If this option is selected, a Default Value must also be provided.
- Default Value - the value that will be used automatically on new records, or on imported records when no value is provided. Required fields must always have a default value set, otherwise it is optional. Note: If the field is defined as a List, the default value is set for one of the list values.
- Available To
  - Data Imports - controls whether the field can be selected as a target for data import

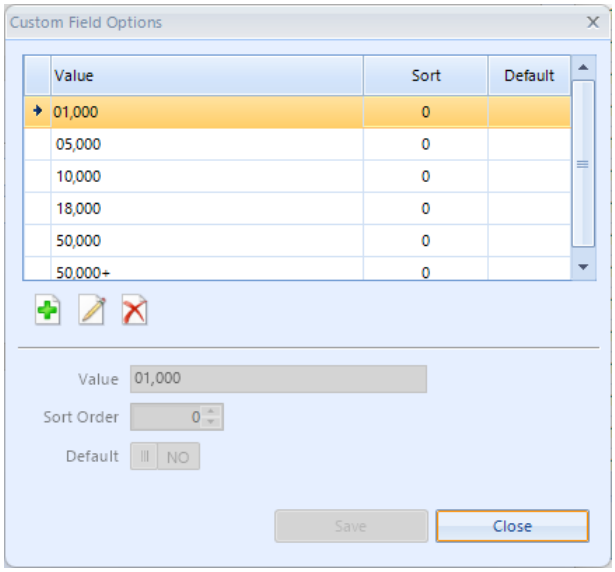
- Advanced Criteria - controls whether the field can be used as part of an advanced search
- Reports and Views* - controls whether the field can be added to and displayed on reports and views
- Emails* - controls whether the field will appear in the Field List for embedding in emails
- Front Desk Search* - controls whether the field will appear on the Front Desk window as a search field

Creating a List Field

1. When the Field Style is set to List, an Edit icon will appear next to the Field Style field.



2. Click Edit to modify the records in the list.



3. The following fields are available for each list record:
   - Value - the value for the field. The value must conform to the data type of the field.
   - Sort Order - the order in which the value will appear in the list. When the sort orders match, the list sorts alphabetically by value.
   - Default - indicates the default selection for the list

* Professional Version Only

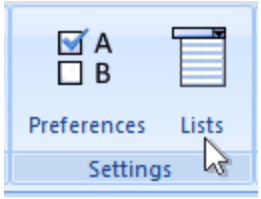
16.8 Genders

Genders are available to member and friend/family records.

Note: You cannot delete a record that is in use.

Maintaining Genders

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, choose Genders.
3. Modify the list as needed.

16.9 Group Types

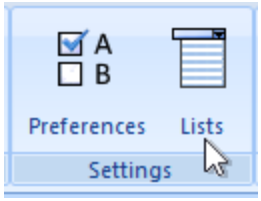
Each group record can be assigned a specific "type." The group type can be especially helpful to categorize similar groups.

For example, a common use of group records is for committees. A group record is a convenient way to group members together in a way that can be easily used on search windows. So if groups have been renamed to "Committees", you might setup group types for "Fund-Raising", "Social Planning", etc. Then you can easily find all of the members on the committee by simply using that group name and type as search criteria.

Note: You cannot delete a record that is in use. One solution is to create an entry called, "Undefined" or "Unknown" and merge the unwanted entries into that one.

Maintaining Group Types

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, choose Group Types.
3. Modify the list as needed.

Combining Values

Entries on this list can be combined into one. See Merging/Combining Values for details.

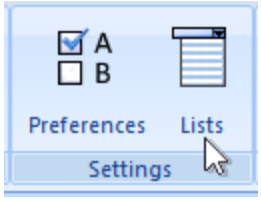
16.10 Occupation Names

Occupation Names are used on membership records to record a person's type of employment. Typical entries might be, "Doctor", "Lawyer", "Con Artist", etc.

Note: You cannot delete a record that is in use. One solution is to create an entry called, "Undefined" or "Unknown" and merge the unwanted entries into that one.

Maintaining Occupation Names

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, choose Occupation Names.
3. Modify the list as needed.

Combining Values

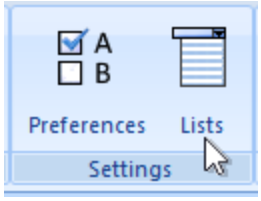
Entries on this list can be combined into one. See Merging/Combining Values for details.

16.11 Payment Methods

Payment methods enable you to identify postings by a method such as cash, cheque, Visa, etc.

Maintaining Payment Methods

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, choose Payment Methods.
3. Modify the list as needed.

Combining Values

Entries on this list can be combined into one. See Merging/Combining Values for details.

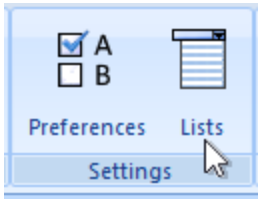
16.12 Phone Types

Phone Types are used on the details window for membership records to further identify phone numbers to be pagers, fax numbers, mobile phones, etc. You can add or delete phone types at any time. As soon as the new type is added, it is available for all phone numbers on membership records. Additionally, the phone type specified as the Default for a given type will automatically be entered on new records. A default should exist for Home, Work, and Other phone types.

Note: You should leave the phone type called Normal alone. This should be used for any phone number that is a "normal" phone. Certain system defined reports that include the phone type will omit the value if it is set to Normal.

Maintaining Phone Types

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, choose Phone Types.
3. Modify the list as needed.

Combining Values

Entries on this list can be combined into one. See Merging/Combining Values for details.

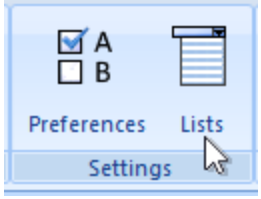
16.13 Posting Types

With MemberTies Professional, Posting Types enable you to categorize dues or donation postings, restrict the amount that can be posted under the type, control whether the amount posted will affect the member's account as a debit (reducing the account balance) or credit (increasing the account balance), and indicate whether the system should generate a receipt number.

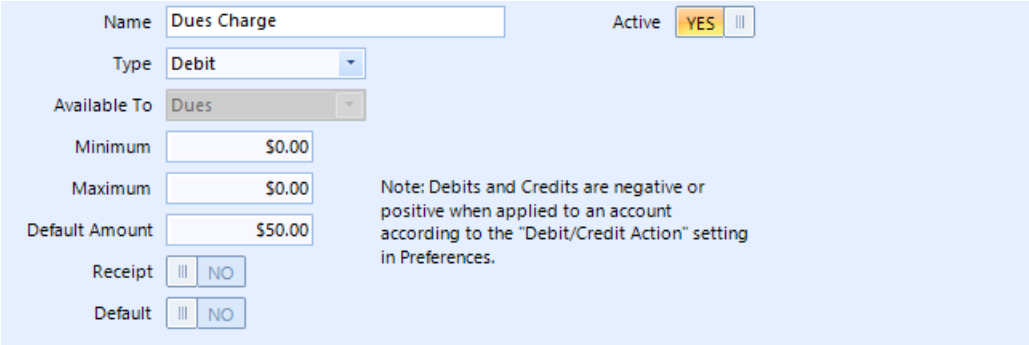
Note: You cannot delete a record that is in use. One solution is to create an entry called, "Undefined" or "Unknown" and merge the unwanted entries into that one.

Maintaining Posting Types

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, choose Posting Types.



3. Modify the list as needed. The following fields are available:

   - Name - the name for the posting type
   - Type - identifies the type as Debit or Credit. By default, debits are a negative adjustment to the balance, and credits are positive adjustments. This can be reversed with the Debit/Credit Action preference.
   - Available To - controls whether the posting type is available to activities, groups, member dues, or member donations
   - Minimum - an optional minimum amount allowed to be entered on postings using this type. The default value is zero, indicating no minimum.
   - Maximum - an optional maximum amount allowed to be entered on postings using this type. The default value is zero, indicating no maximum.
   - Default - an optional amount to be entered automatically when this posting type is selected on a new posting. The default value is zero.

     Note: If a Maximum amount is set, any Default amount must fall within the range created by the Minimum and Maximum.

- Receipt - controls whether a unique receipt number should be generated for the posting (for display on the printed receipt). The current receipt and receipt book numbers can be set via Preferences.
- Default - controls whether this is the default posting type used on postings of this type. You can specify a separate default for activity, group, dues, and donation posting types.
- Active - controls whether the posting type is available for use. If a posting type is no longer to be used, the active flag can be turned off so it is no longer available for use on new records. (Existing records using the type will continue to display it.)

Combining Values

Entries on this list can be combined into one. See Merging/Combining Values for details.

16.14 Preloaded Member IDs

If your organization is required to use a pre-defined set of membership IDs, you can pre-load these into the system so that each time you create a new membership record, the next available ID will be used automatically. You can enter IDs manually, or you can import them from a text file.

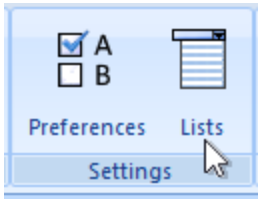
As long as the Member ID list contains active, unused IDs, the next ID will be automatically entered on new membership records. (This can also be a convenient way of ensuring sequential IDs.)

You are allowed to change this value to anything you wish, or you can have the system automatically assign an ID selected from a predefined list. (For general information about Member IDs, see, About Member IDs.)

Note: The Preloaded Member ID window includes an option to require an ID from the list for all new member records. If this option is set and the last ID is used, the system will not allow new member records to be created until new IDs are added to the list.

Maintaining Posting Types

1. On the Home ribbon, choose Lists from the Settings section.

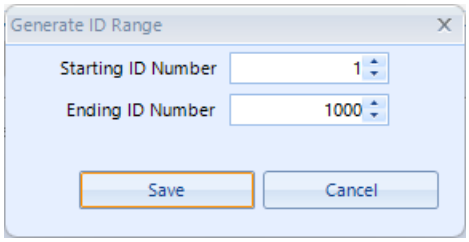


2. On the System Lists window, choose Preloaded Member IDs.

3. Modify the list as needed. The following fields are available:
   - Member ID - the member ID as it should display on the member record
   - Active - indicates whether the ID is available for the system to assign
   - Used - indicates the ID has been assigned

Generating a List of IDs

If you want to create a simple numeric series of IDs, click the Generate (lightning bolt) icon below the list.



Specify the starting and ending number and click Save to generate the list.

Loading a List of IDs

To load a large list of IDs, click the browse icon below the list and select the file containing them. The list must be a simple text file with one ID per line.

Combining Values

Entries on this list can be combined into one. See Merging/Combining Values for details.

Synchronizing the List

You can force the list to scan the database and mark IDs in the list as Used if they're found on a record. This option is available by right-clicking the list and choosing Synchronize Used/Unused with Member Records.

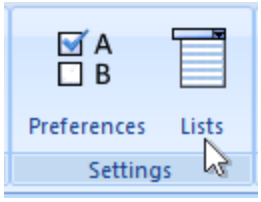
16.15 References

References are used on membership records to record the way in which someone came to know about your organization. Typical entries might be, "friend", "online", "event", etc.

Note: You cannot delete a record that is in use. One solution is to create an entry called, "Undefined" or "Unknown" and merge the unwanted entries into that one.

Maintaining References

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, choose References.
3. Modify the list as needed.

Combining Values

Entries on this list can be combined into one. See Merging/Combining Values for details.

16.16 Status Codes

Statuses (often referred to as "membership types") control one of the most basic aspects of membership records. The status of a member can trigger a lot of different functionality, especially if you are using MemberTies Professional.

Status codes can control:

- the automated processing of membership records that have expired (i.e., the End Date has passed), determining whether they should be converted to a different (usually inactive) status, deleted, or left alone.
- the yearly dues payment amount for each status, whether that amount is prorated, and how. This information is used on the Dues Calculator.
- whether a record with the status should be linked to another record. For example, a "Family" status might be expected to always involve more than one membership record, so the status can be defined to require that another membership record be associated with any record with that status.
- which status is the default used on new records.

- Interest charges* to be automatically applied to "past due" memberships with a negative dues balance
- automatic "scheduled" postings*, for example, to automatically post a dues charge to members with the status on the 15th of each month, the 1st of January, etc.
- the automatic setting of the "Include in Mailings" and "Include on Reports" flags when the status is selected (or when automatically changed to this status by an expiration behavior).
- the number of activities a member can attend*.

Status Flow

The system comes preloaded with several statuses, but you can remove any or all of them, or just rename and redefine them. You can create as many as you need in addition to the default DELETE status that is required by the system. It is a good idea to draw out the flow of statuses in your organization before setting them up.

For example:

PROSPECT changes to DROPPED 30 days after the End Date
DROPPED changes to (DELETE) 90 days after the End Date
REGULAR changes to ALUMNI 90 days after the End Date
ALUMNI never expires and never changes

The above example indicates that once a Prospect status record expires (reaches the End Date), there is a 30 day grace period before it changes to an inactive Dropped status. The idea being that if you haven't heard from then within 30 days you want them removed from the active roster. If another 90 days passes without contact, the record should be deleted because they apparently aren't interested.

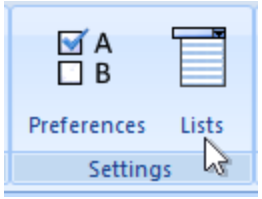
Regular members, in the above example, might be people who are truly members that you don't want to forget about. Those records shift to an inactive Alumni status if they don't renew after 90 days, and they remain as Alumni indefinitely.

Note: When an automatic status change occurs, the Include in Mailings and Include on Reports flags are automatically updated to reflect the settings defined for the new status.

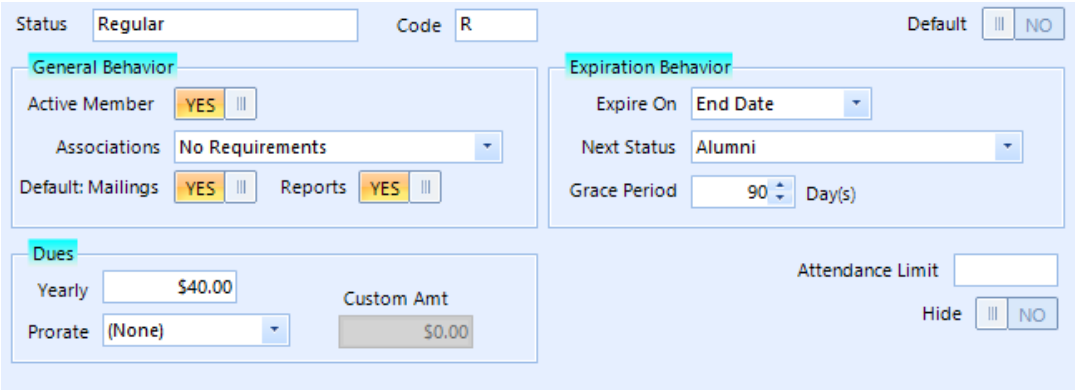
Note: Any membership record that is set to the "(Delete)" status (manually or automatically via "Next Status") will be automatically deleted when you exit the program, unless the Auto Delete (Delete) Status preference is turned off. (You will be prompted to confirm the deletion however, unless another preference controlling the prompt itself is also off.)

Working with Status Codes

1. On the Home ribbon, choose Lists from the Settings section.



1. On the System Lists window, expand the Statuses section.
2. Choose Statuses.



3. The following fields are available:

- Status - name to display for the status in lists.
- Code - an abbreviation or code representing the status. You can use this as you wish, typically on reports when you don't want to display the full name. The Code must be unique across all statuses.
- Default - indicates the status is the default status for new member records
- General Behavior
  - Active Member - indicates whether a member with this status is considered "active" or not
  - Associations - indicates whether the system should require an association between the member and another member or group. This might apply to a "family" status where at least one other record must be associated in order to qualify.
  - Default Mailings - controls whether the Include in Mailings flag should be set automatically on records when this status is set
  - Default Reports - controls whether the Include on Reports flag should be set automatically on records when this status is set

- Dues
  - Yearly - the yearly dues amount. This amount is used on the Dues Calculator, as well as when entering dues payments manually. When a status is selected when posting dues, this amount is displayed for quick entry.
  - Prorate - indicates how dues amounts should be prorated, if at all. This setting is used by the Dues Calculator to pre-select the dues proration option. If you expect to prorate dues on a monthly basis, setting this option makes it easier to remember to do so when using the calculator. Note that you can override this setting on the calculator if you wish.
  - Custom Amt - if you decide to prorate the yearly dues amount, it will do so based on 12 months or 365 days, as appropriate. If you enter an amount here, then this amount will be used instead of the amount calculated by dividing the amount by 12 or 365. (Of course, if you enter a custom prorate amount based on monthly proration, and then change to daily when using the dues calculator, you may get unpredictable results.)
- Expiration Behavior
  - Expire On - If you want the system to automatically change the status of the member record, select the "trigger" for the change.
    - End Date -- causes the status to change when the End Date arrives. Note that the Reset End Date membership preference controls whether the End Date is reset when the status changes.
    - Age -- causes the status to change when a person reaches a certain age. i.e., you could have a "Junior" status that automatically changes to "Adult" status when the member reaches the age of 18 .
    - Start +Days -- causes the status to change X days after the member's Start Date. i.e., you could have a "Probation" status that automatically changes to "Active" after 90 days.

      Note that the appropriate data must be available for each option to work. i.e., if you choose End Date, it won't apply to records without an End Date value; if you choose Age, it won't apply to members without a full birth date; and if you choose +Days, it won't apply to members without a Start Date.

      Status changes are processed when MemberTies starts.
  - Next Status - the next status to set for the membership record when it expires.
  - Grace Period ... Day(s) - the number of days after the trigger (Expire On) date to wait before initiating a status change. This can be used to provide members with a few weeks to "get current" with their dues before they're

changed to another status. An entry of "0" (zero) or blank will cause status changes to occur immediately when the End Date passes. Note that the Reset End Date on Expire preference controls what happens to the End Date when such a status change occurs.

- Attendance Limit - the maximum number of activities a member with this status can attend. When a person is about to exceed this limitation at check-in time, the system will display a warning, at which time you may choose to allow the check-in to proceed. You can also specify a per-activity attendance limit by status. Any limit defined here will take priority over any per-activity limit. In addition, each activity has an option that controls whether limits apply to it at all. See Working with Activities for more information.

- Hide - if you do not want this status to be available for use on membership records, this will hide it. (The status will remain on any records that currently use it, but it won't be available for any other records.) This is intended as a way to "retire" an old status that is no longer needed.

* Professional Version Only

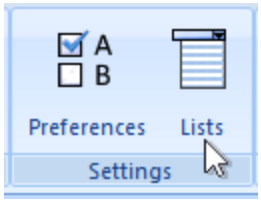
16.17 Status Interest Charges

If your organization charges interest on past-due accounts, this feature enables you to set up how interest will accrue. (A "past-due" account is defined as any account with a debit account balance. It is assumed that if you choose to use this feature, dues accounts will be considered "current" whenever the account has a zero balance or a credit balance (indicating an over payment for example).

An interest setting is tied to a particular membership status so you can charge different interest rates for different membership types. Perhaps an active member would be charged interest at a rate of 5% annually, but an inactive member would only be charged 2% because it isn't as important that they keep their account current. One interest setting can be defined per status.

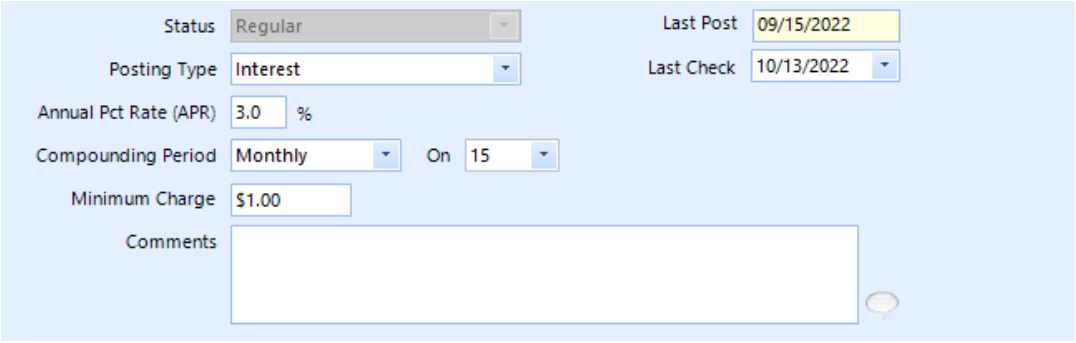
Working with Status Interest Charges

1. On the Home ribbon, choose Lists from the Settings section.



1. On the System Lists window, expand the Statuses section.

2. Choose Interest Charges.



3. The following fields are available:

- Status - the status to which the interest settings will apply. Once set, this field cannot be changed.
- Posting Type - the (dues) posting type that should be used when the system posts automatic interest charges. Only debit action posting types are available.
- Annual Pct Rate (APR) - the annual percentage rate for the interest charges. This value will be used to determine the actual rate applied for the compounding period. Enter the actual percentage, i.e., for 9.5%, enter 9.5 not .095.
- Compounding Period - interest is calculated based on the compounding period as follows:
  - Daily: ((APR / 100) / 365) x (outstanding balance)
  - Monthly: ((APR / 100) / 12) x (outstanding balance)
  - Yearly: (APR / 100) x (outstanding balance)
- Accrual Date (ON) - the field displayed to the right of the compounding period and varies based on the selected Compounding Period:
  - Daily Compounding: this field is not used, because a daily compounding means all days.
  - Monthly Compounding: this field enables you to enter the day of the month on which charges should be posted. The default is the first day of the month.
  - Yearly Compounding: this field enables you to enter the month and day on which charges should be posted.
- Minimum Charge - the minimum charge to apply whenever interest is applicable. For example, you may charge 5% interest, with a minimum of $10.00 due whenever an account is outstanding. In this case, if the interest due is $7.50, the system would post $10.00 instead.

- Comments - any comments that should appear in the interest posting comments field.
- Last Post - the last date interest charges of this type were posted to an account.
- Last Check - the date on which the system will next check for charges to be posted. This is the date through which interest charges on this status should be considered to be current. This field defaults to the current date when a new setting is created. If you want the system to go back and post interest beginning at an earlier date, change this value to a date in the past. Likewise, if you don't want interest posting to begin until a future date, enter a future date.

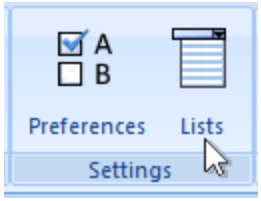
  Be very careful about entering a date in the past! If, for example, you enter a date a year in the past, the system will begin at that date and will check every membership record of the selected status for every missed compounding period and post interest appropriately until the account is current.

16.18 Status Scheduled Postings

To simplify repetitive charging of dues or other fees, you can schedule one or more automatic postings for any status. For example, if all Regular status members are charged an account maintenance fee of $10.00 on the first of each month, and a yearly renewal of $200.00 on the day their End Date is reached, you can create two scheduled postings to handle this automatically!

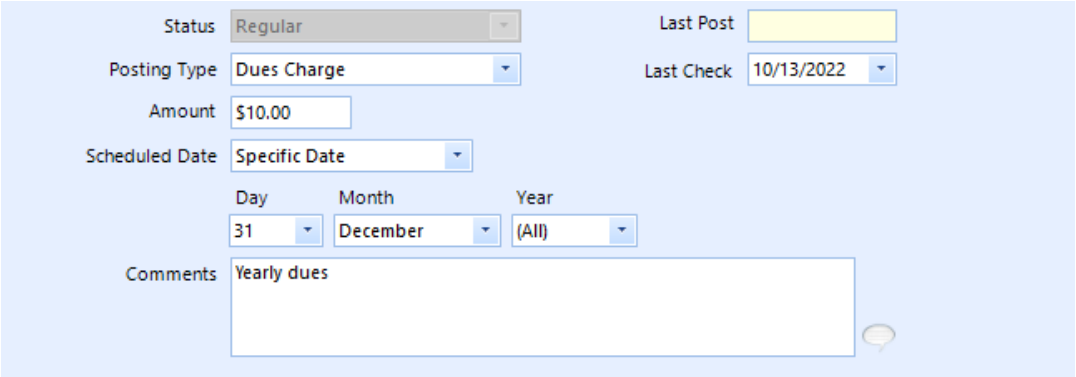
Working with Status Scheduled Postings

1. On the Home ribbon, choose Lists from the Settings section.



1. On the System Lists window, expand the Statuses section.

2. Choose Scheduled Postings



3. The following fields are available:

- Status - the status to which the interest settings will apply. Once set, this field cannot be changed.
- Posting Type - the posting type that should be used when the system posts the charge. You can choose from any available posting type.
- Amount - the amount to post
- Scheduled Date - the date on which the posting should be made
  - End Date - amount is posted on the End Date
  - Start Date - amount is posted on the Start Date (this works well when a start date is set to a future date, i.e., a pending membership)
  - New Record Save -- amount is posted when a **new** membership record is *first saved*.
  - Specified Date -- amount is posted on the chosen date. If you choose this option, you must at least choose a Day; but, the month and year are optional. This enables you to create a rule that posts an amount on the 1st of every month, or on the 12th of every February, or specifically on the 23rd of March, next year.
- Comments - any comments that should appear in the comments field of the posting
- Last Post - the last date a scheduled posting for this status was posted to an account
- Last Check - the date on which the system will next check for postings to make. This is the date through which postings on this status should be considered to be current. This field defaults to the current date when a new setting is created. If you want the system to go back and post beginning at an earlier date, change this

value to a date in the past. Likewise, if you don't want postings to begin until a future date, enter a future date.

Be very careful about entering a date in the past! If, for example, you enter a date a year in the past, the system will begin at that date and will check every membership record of the selected status for every missed date and post amounts appropriately until the account is current.

16.19 Stored Comments

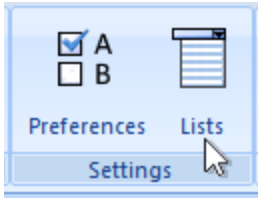
Stored comments enable you to set up and save common text entries for use in various free-form Comments fields throughout the system. Such fields exist on membership, group, and activity records, dues entries, and even some report settings. The stored comment can be anything you type frequently, such as "Sent welcome letter." or, "Your account is past due. Please remit payment immediately to avoid cancellation."

A Comment icon will be displayed next to comments fields. Clicking this icon will display the list of comments, from which you can select an entry to insert into the field.

Comment Icon

Maintaining Stored Comments

1. On the Home ribbon, choose Lists from the Settings section.



2. On the System Lists window, choose Stored Comments.
3. Modify the list as needed.

Part XVI

Postings (Dues, etc.)

17 Postings (Dues, etc.)

17.1 Postings Overview

Postings are handled differently depending on whether you are using the standard or professional version of the software.

The standard version of MemberTies simply tracks a running total of dues paid. It doesn't include donations, or postings via activities or groups. You can think of every entry as being a credit (positive adjustment) to the member's account. For more accurate tracking of payments and charges, MemberTies Professional enables you to enter both debits and credits. The system of debits and credits enables you to maintain a zero balance when a member's account is paid in full (i.e., $50 dues charge balanced by a $50 dues payment).

For example, if a member had paid two payments of $50 each, the difference between the standard method and the professional method would look something like this:

Standard Dues Payments	Professional Dues Charges and Payments
Dues Payment 1: $50.00 Dues Payment 2: $50.00	Dues Charge 1: ($50.00) Dues Payment 1: $50.00 Dues Charge 2: ($50.00) Dues Payment 2: $50.00
Balance: $100.00	Balance: $0.00

As you can see, both versions tracked two incoming payments, but the professional version also tracked the charges. When a person was charged, their account became negative, and when the paid, the account returned to zero. (Note: If you want charges to be positive, and payments to be negative, you can change a preference to control it.)

Note: The word "Check" changes to "Cheque" if the Language preference is not US English.

Whose dues are due?

When it comes to Dues, everyone needs to know which members currently owe money. The answer to that question frequently comes down to the way you are tracking dues.

- With the standard version, there is no way to tell simply by looking at a running balance; instead, you have to maintain the End Date on the member record. MemberTies assumes that the End Date represents the date through which a person is "paid in full," and when the End Date is reached the member pays for another period and gets a new End Date set for some point in the future. So, to find out who owes money, you can simply search for everyone with an End Date in the past (because if their dues were paid, they would have a new End Date in the future).

- With the professional version, you can look at the End Date as described above, but you can also look for anyone with a negative dues balance (if you're letting debits be negative). That's because a negative balance would mean they have been charged more than they've paid. Likewise, anyone who has paid too much will have a credit (positive) balance.

Sending out Statements

To send out a statement requesting payment, you can run the Dues Account Statement report. By default it will list all postings for a given member, and finish with the balance. If you run the report with criteria like:

```
Dues Balance < 0
```

The report will only show members who have a negative (less than zero) balance. The statement can include a tear-off remittance advice that can be returned with payment.

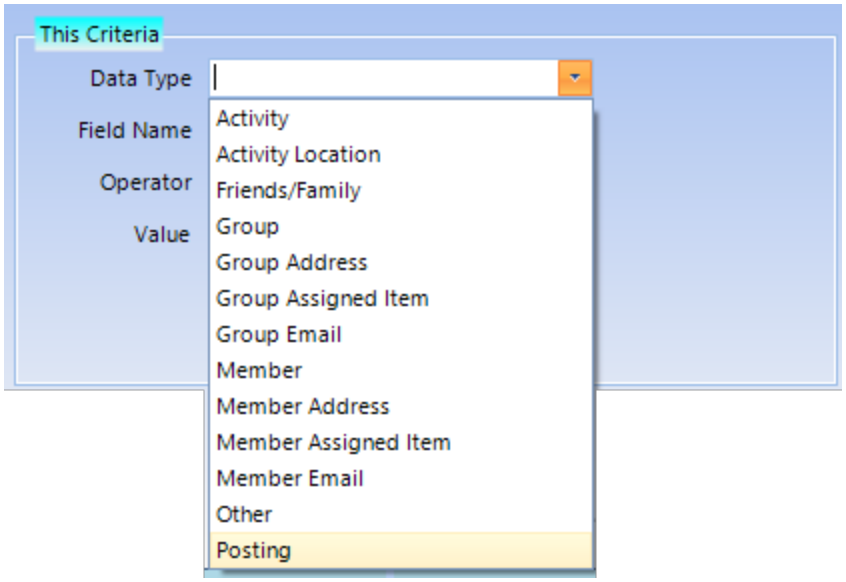
Date Posted vs Date Recognized

All postings enable you to track both the date the entry was posted, and the date you want to "recognize" the posting. (This is also sometimes called the "effective date".) For example, if dues payments are all due on January 1st, you may want to "recognize" dues payments received in December as of January 1. So when a payment arrives on December 20th, you would enter the payment with a Date Posted for December 20th, but a Date Recognized of January 1st of the following year.

That enables you to run a report using criteria like, "Date Recognized = 1/1/2021" to get everyone who has paid their January dues, regardless of when the payment arrived.

The "Posting" Data Type

When using postings as advanced search criteria, you'll notice that while there are different sections for group, member, etc. data types, there is only one Posting data type.



By default, any field under the Posting data type applies to any sort of postings (Dues, Donations, Activity, etc). That means if you enter criteria like:

```
Posting Amount = 50.00
```

The search will find any posting where the amount is 50.00, regardless of whether it is a dues posting, an activity expense, a group dues posting, etc. If you want to limit your search to only postings of a certain type, you should also include the Posting Type Area field, so your search looks something like this:

	(((	Field	Operator	Value	)))	And/Or
		Amount	=	$50.00		And
➔		Posting Type Area	=	Dues		

Now the search will only find postings that are tied to a posting type that is for Dues.

Note: Many reports are already restricted to a certain type of postings. For example, the Donations by Date report is obviously focused on Donations, whereas the Dues Account Statement is focused on Dues. If you try to add the Posting Type Area in your search, you will get unpredictable results, and the query may be ignored entirely. The reports listed under Misc Reports include several generic posting reports that are not already tied to a particular Posting Type Area. These enable you to pull in posting data from across all areas of the system unless you choose to include the Posting Type Area field to limit the results.

17.2 Posting to Individual Records

Postings are handled differently depending on the type of record:

- Members - use the Dues or Donations* page, or from the Front Desk* via the postings icon in the Member Synopsis area.
- Groups* - use the Dues Postings page
- Activities* - use the Income & Expense page.

To post to multiple records at once, see Posting to Multiple Records.

* MemberTies Professional only

17.3 Posting to Multiple Members

With MemberTies Professional, you can post a specific posting entry to multiple Member records at once. You can choose to post to all records currently selected on the Membership List, or to specific records, or to all records of a particular status, regardless of whether they are visible on the Membership List.

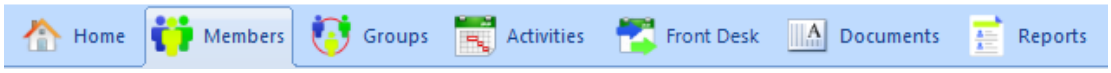
This feature can also be used to "zero-balance" an account, i.e., to post whatever amount is required to bring an account to a balance of zero.

Whether you want to post a specific amount, or zero-balance accounts, you will use the Add Postings window. This window is accessible whenever the Membership List or Group List is open.

Note: Since this will affect multiple records, it is a good practice to make a fresh backup of your database before starting. However, if you accidentally post entries to a group of records and want to remove the postings, see Deleting Postings from Multiple Records.

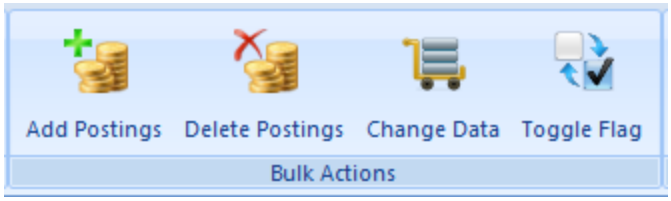
Adding Multiple Postings - Member Records

1. Choose the Members tab from the ribbon bar.

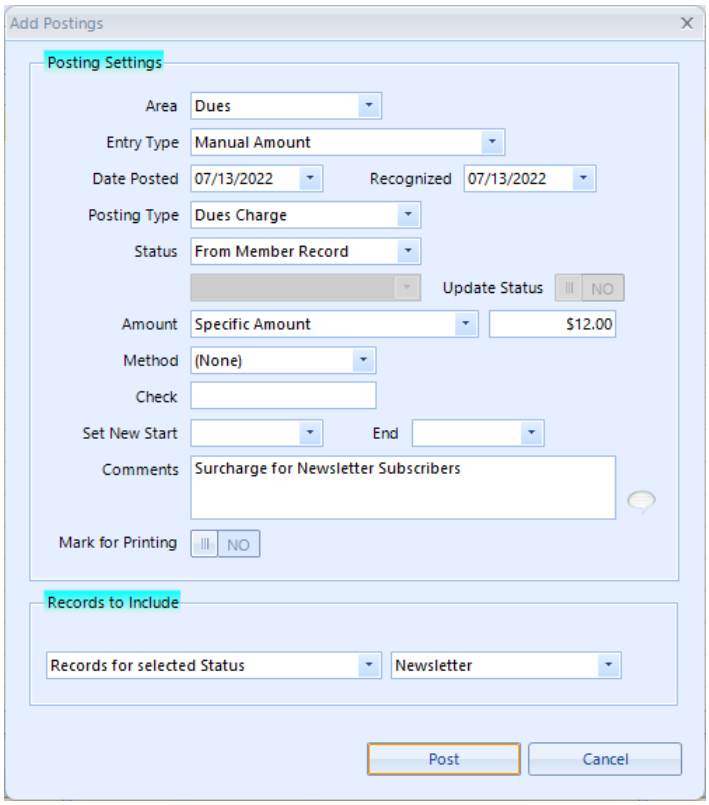


2. If you plan to post to a set of selected records, highlight each record to which you want to post to. You can use the standard Windows selection methods.

3. In the Bulk Actions section of the ribbon, click Add Postings.



4. The Add Postings window will open.



The following fields are available:

- Area - lists the types of postings that can be created
- Entry Type - controls the basic operation of the window:
  - Manual Entry - Enables you to post a specific amount, using the posting type you choose.
  - Zero-Balance - Tells the system to post whatever amount is required to bring the selected account(s) to zero, using the appropriate debit or credit posting types you choose.
- Date Posted - the date on which the entry was created. Normally the current date.
- Date Recognized - the date on which you want the amount to apply to your organization
- Posting Type - The posting type to be used for each entry. If you selected Zero-Balance as the Entry Type, there will be two posting type fields visible. The Credit type will be used for any account that requires a credit entry to balance it, and the Debit type will be used for any account that requires a debit entry to balance it.

  Note: if you select a posting type that generates a receipt number, this will be done automatically as postings are written to the database.

- Status - controls where the status value for the new posting will be found.
  - From Membership Record - use the member's current status
  - Specific Status - to enable the status list so you can pick a status, and optionally, turn on the Update Status switch so the new status is also applied to the underlying member record.
- Amount - The amount to be posted can be entered manually, or selected from various other options.
  - Specific Amount - lets you enter any amount you choose (note that all amounts are entered as positive numbers -- it is the posting type that determines whether it is applied as a positive or negative adjustment
  - Minimum for Posting Type - automatically uses the minimum allowed for the selected posting type
  - Maximum for Posting Type - automatically uses the maximum allowed for the selected posting type
  - Yearly Dues for Selected Status - automatically uses the yearly dues amount set for the selected status. No amount is shown because it is looked up as the process runs.
  - Yearly Dues for Record Status - automatically uses the yearly dues amount for the status of the record being updated

  Note: If you selected Zero-Balance as the Entry Type, the amount fields are not visible because the system will calculate the amount for each account.
- Method - lists all available payment methods.
- Check - the cheque number or other payment identifier
- Set New Start / End - if you want to change the current Start and/or End Date on the membership record(s) posted to, set the appropriate date(s)
- Comments - any comments that should be used for the every entry
- Mark for Printing - controls whether each posting is flagged for receipt printing
- Records to Include
  - Selected Records - will post to every record currently selected (highlighted) on the Membership List
  - Records for Selected Status - will post to all members currently set to the selected status, regardless of whether they are currently selected or even displayed on the Membership List.

5. When you're ready to post entries, click Post.

17.4 Posting to Multiple Groups

With MemberTies Professional, you can post a specific posting entry to all Group records currently selected on the Group List.

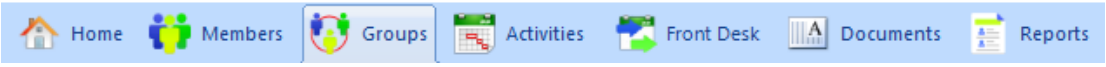
This feature can also be used to "zero-balance" an account, i.e., to post whatever amount is required to bring an account to a balance of zero.

Whether you want to post a specific amount, or zero-balance accounts, you will use the Add Postings window. This window is accessible whenever the Membership List or Group List is open.

Note: Since this will affect multiple records, it is a good practice to make a fresh backup of your database before starting. However, if you accidentally post entries to a group of records and want to remove the postings, see Deleting Postings from Multiple Records.

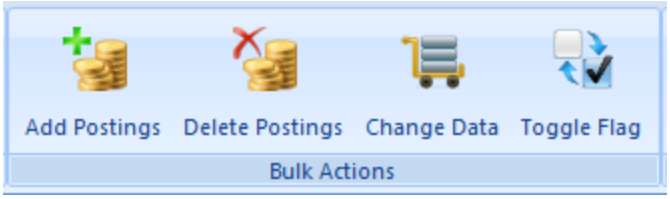
Adding Multiple Postings - Group Records

1. Choose the Groups tab from the ribbon bar.

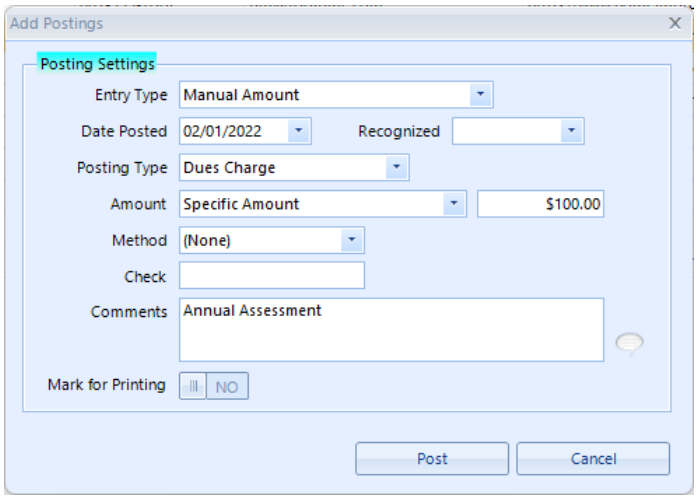


2. On the Group List, highlight each record to which you want to post to. You can use the standard Windows selection methods.

3. In the Bulk Actions section of the ribbon, click Add Postings.



4. The Add Postings window will open.



The following fields are available:

- Entry Type - controls the basic operation of the window:
  - Manual Entry - Enables you to post a specific amount, using the posting type you choose.
  - Zero-Balance - Tells the system to post whatever amount is required to bring the selected account(s) to zero, using the appropriate debit or credit posting types you choose.
- Date Posted - the date on which the entry was created. Normally the current date.
- Date Recognized - the date on which you want the amount to apply to your organization
- Posting Type - The posting type to be used for each entry. If you selected Zero-Balance as the Entry Type, there will be two posting type fields visible. The Credit type will be used for any account that requires a credit entry to balance it, and the Debit type will be used for any account that requires a debit entry to balance it.

  Note: if you select a posting type that generates a receipt number, this will be done automatically as postings are written to the database.
- Amount - The amount to be posted can be entered manually, or selected from various other options.
  - Specific Amount - lets you enter any amount you choose (note that all amounts are entered as positive numbers -- it is the posting type that determines whether it is applied as a positive or negative adjustment
  - Minimum for Posting Type - automatically uses the minimum allowed for the selected posting type

- Maximum for Posting Type - automatically uses the maximum allowed for the selected posting type

Note: If you selected Zero-Balance as the Entry Type, the amount fields are not visible because the system will calculate the amount for each account.

- Method - lists all available payment methods.
- Check - the cheque number or other payment identifier
- Comments - any comments that should be used for the every entry
- Mark for Printing - controls whether each posting is flagged for receipt printing

5. When you're ready to post entries, click Post.

17.5 Posting Dues Automatically

With MemberTies Professional, you can setup auto-posting rules on any membership status so that the system will automatically post a specific dues entry at specific times of the year.

For example, you can have the system automatically post an initiation fee when the record is created, and your your annual dues charge on the last day of every year. Then all you have to do is record payments as they come in.

Scheduled Postings

Status Name	Scheduled Date	Posting Type	Amount	Last Check	Last Post
Family	End Date	Dues Charge	$20.00	10/13/2022	
Regular	Specific Date	Dues Charge	$10.00	10/13/2022	
Regular	New Record Save	Dues Charge	$100.00	05/27/2022	06/01/2022

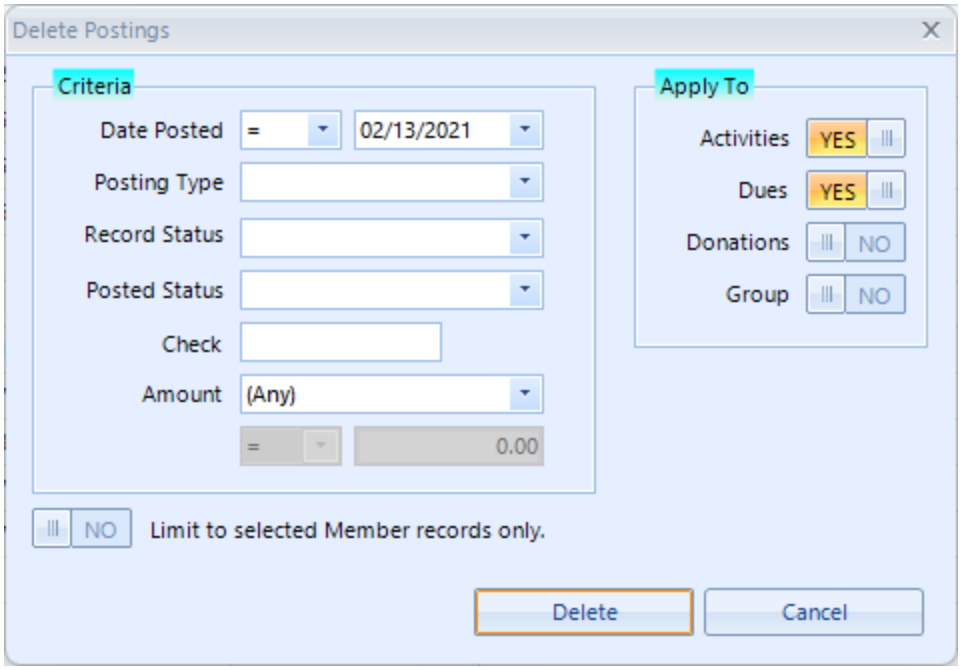
See Scheduled Postings for details.

17.6 Deleting Postings from Multiple Records

With MemberTies Professional a special deletion window is available to remove postings of any type from multiple records based on specific criteria. This enables you to "undo" an errant posting without opening and modifying hundreds of records individually.

Deleting Postings

1. On the Members, Groups, or Activities workspace, choose Delete Postings from the Bulk Actions section of the ribbon.



Note: this window is identical on all workspaces, *except* for the "Limit to selected XXX records only" option at the bottom. The above example was opened from the Group List.

2. Enter the search criteria. The following fields are available:

Note: All fields are optional, but you must enter at least one piece of criteria.

- Date Posted - the date to be matched. Change the operator field to the left of the date if necessary.
- Posting Type - lists all available posting types. If you want to target specific postings by type, choose the appropriate option.
- Record Status - the status to match on the membership record itself (only applies when deleting member Dues/Donation/Activity postings)
- Posted Status - the status to match on the individual posting
- Check - the check number to match on the posting
- Amount - the amount to match on the posting
- Apply To - turn on each area you want to search for matches. At least one must be activated..

Note: since this window is used for targeting multiple kinds of postings, so it is possible to choose an impossible combination. i.e., if you choose to apply to Group postings, but require a specific (member) Record Status, the system won't find anything to delete.

3. Click Delete. A message will be displayed with the results of the process.

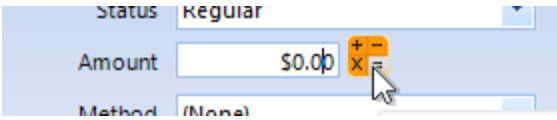
17.7 Using the Dues Calculator

Remembering the appropriate member dues payments for everyone can be difficult, especially when people may decide to join the organization at odd times of the year. The Dues Calculator will determine the correct dues amount for you for any status joining at any month of the year, based on dues amounts you have defined for the status.

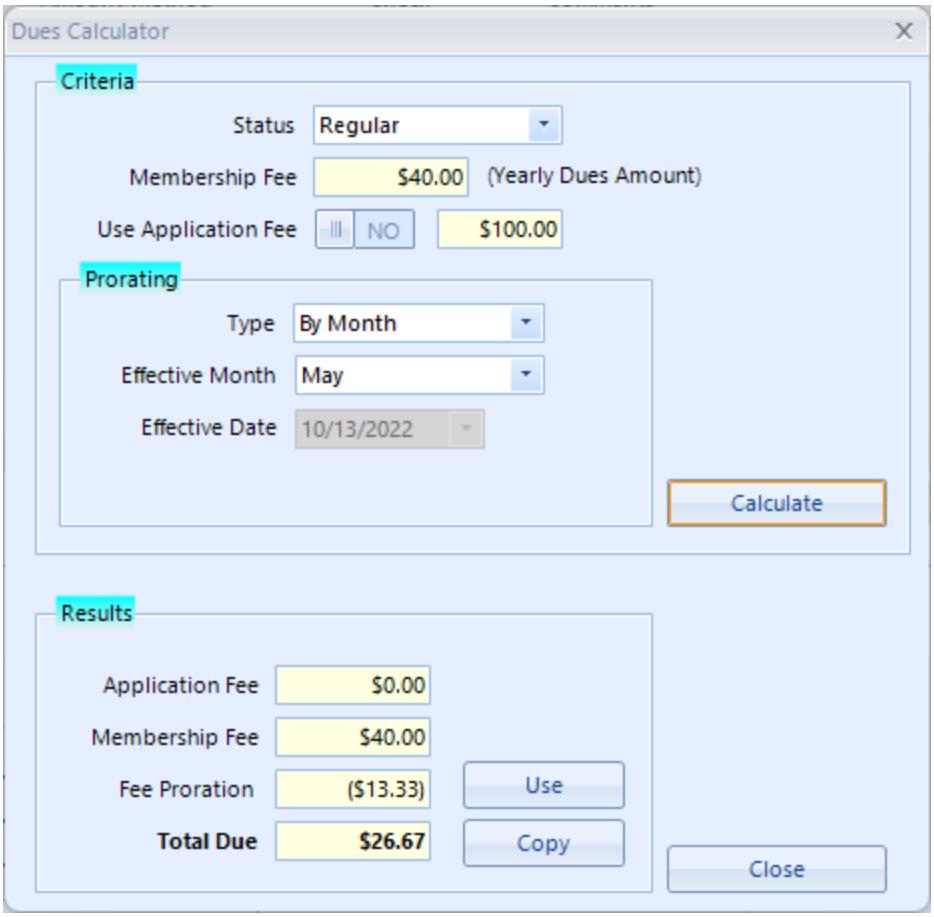
Note: The Dues Calculator is designed for simple monthly proration, and assumes the yearly dues amount has been entered for the appropriate status code. Your organization's dues system may be too complex for the Dues Calculator to handle. See Maintaining Statuses for information about setting the yearly dues amounts.

Using the Dues Calculator

1. The calculator is only available when adding a dues posting on a member record.



2. The calculator will open with the current status on the posting pre-selected.



3. The calculator is divided into two sections, Criteria and Results. The Criteria section enables you to choose the options that determine what will be calculated.

   The following fields are available:

   - Status - the status being purchased; only statuses with a Yearly Dues amount defined are available (because without a yearly dues amount, there is nothing to use for calculations). Choosing the status tells the system which amount to use for the calculator. Once the status is selected, the yearly dues amount will be displayed in the Yearly Dues field, and any custom proration amount will be displayed in the "Prorating" area.

   - Use Application Fee - if an application fee has been setup in preferences, it is displayed next to the switch. Activate this option to include the application fee in the total.

   - Prorating

     - Type - the type of prorating to apply (daily/monthly)

- Effective Month - determines the month prior to which dues will be waived. Dues will be prorated from the beginning of the year, which is the "Year Begin Date" set in preferences, through the specified month.
- Effective Date - determines the date prior to which dues will be waived. Dues will be prorated from the beginning of the year, which is the "Year Begin Date" set in preferences, through the specified day.

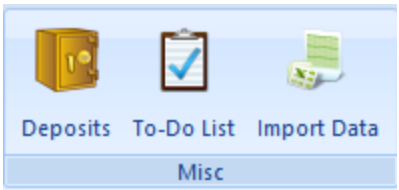
4. Click Calculate. The appropriate payment amount is displayed in the Results area.
5. To copy the total to the clipboard, click Copy, or click Use to paste the dues total into the amount field of the current posting.

17.8 Working with Deposits

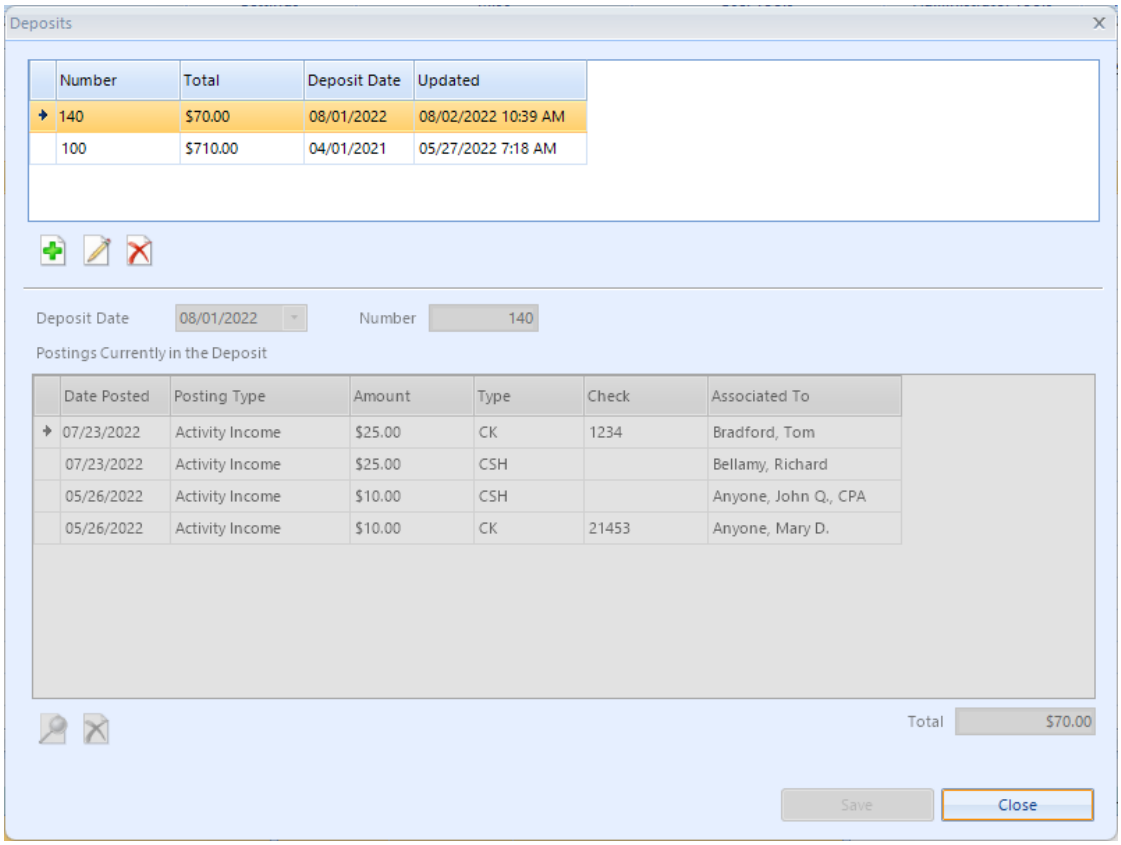
Using MemberTies Professional, any number of postings can be grouped together as a deposit, identified by a deposit number and date. Ordinarily, only income would be added to a deposit, but the deposit search will allow you to search for any kind of posting, so some people create a "deposit" that lists only expenses of certain types, just as a record-keeping process.

Working with Deposits

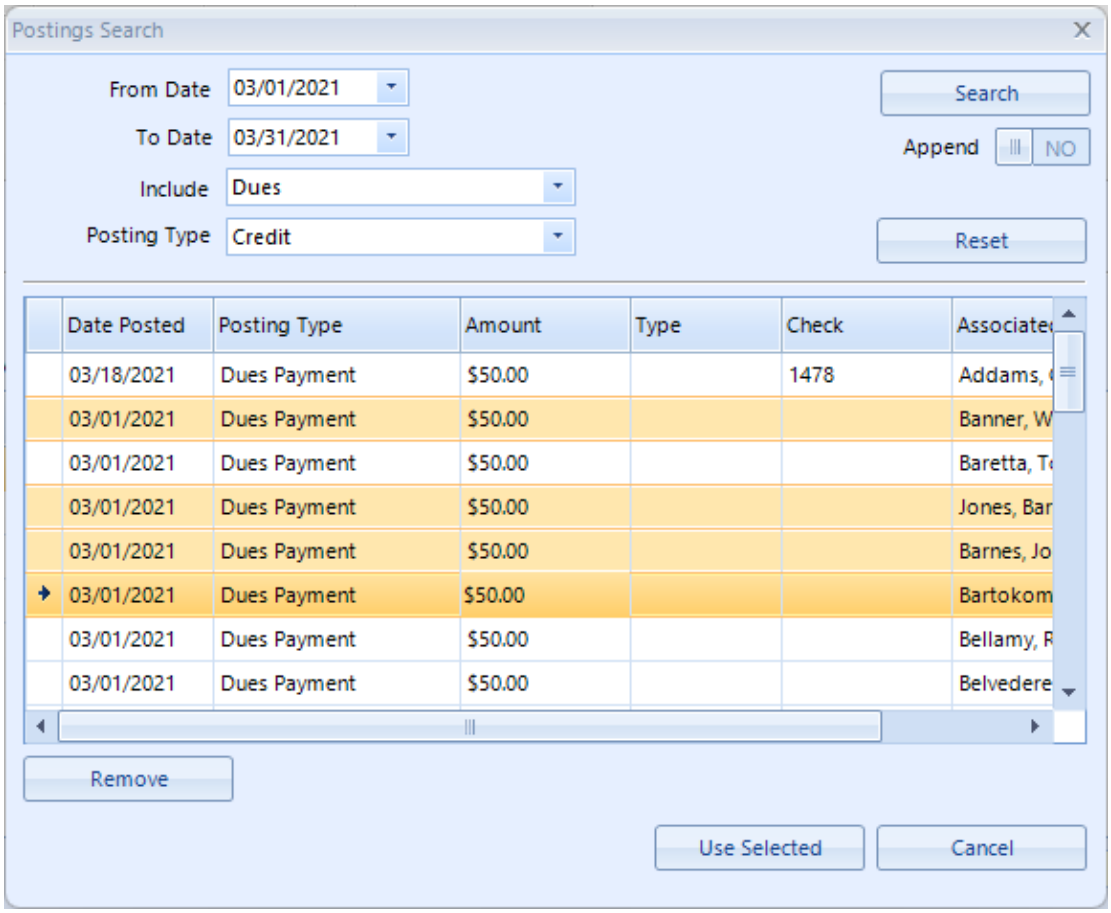
1. Choose the Deposits from the Misc section of the Home ribbon bar.



2. The Deposits window provides a standard dual view of data, showing the list of existing records on the top, and the details below.



3. To add a new Deposit, click Add; or, select an existing record and click Edit, or Delete.
4. The following fields are available:
   - Deposit Date - the date of the deposit. This may represent the date you create the deposit, or the date it goes to the bank.
   - Number - the deposit number
5. Click the Search icon to add postings to the deposit.



6. Enter posting search criteria, and click Search.

7. When the results are displayed, you can select one or more to add to the deposit and click Use Selected to return to the Deposit window.

   Note: You can also "build up" a list of deposits by turning on the Append option and running additional searches. Each new result set will be appended to the existing set. The Remove button can be used to remove any entries you don't want, until you're satisfied with the list.

8. When the deposit is complete, click Save.

Part XVII

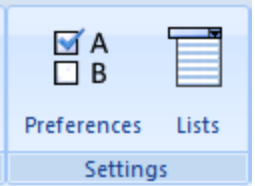
Preferences

18 Preferences

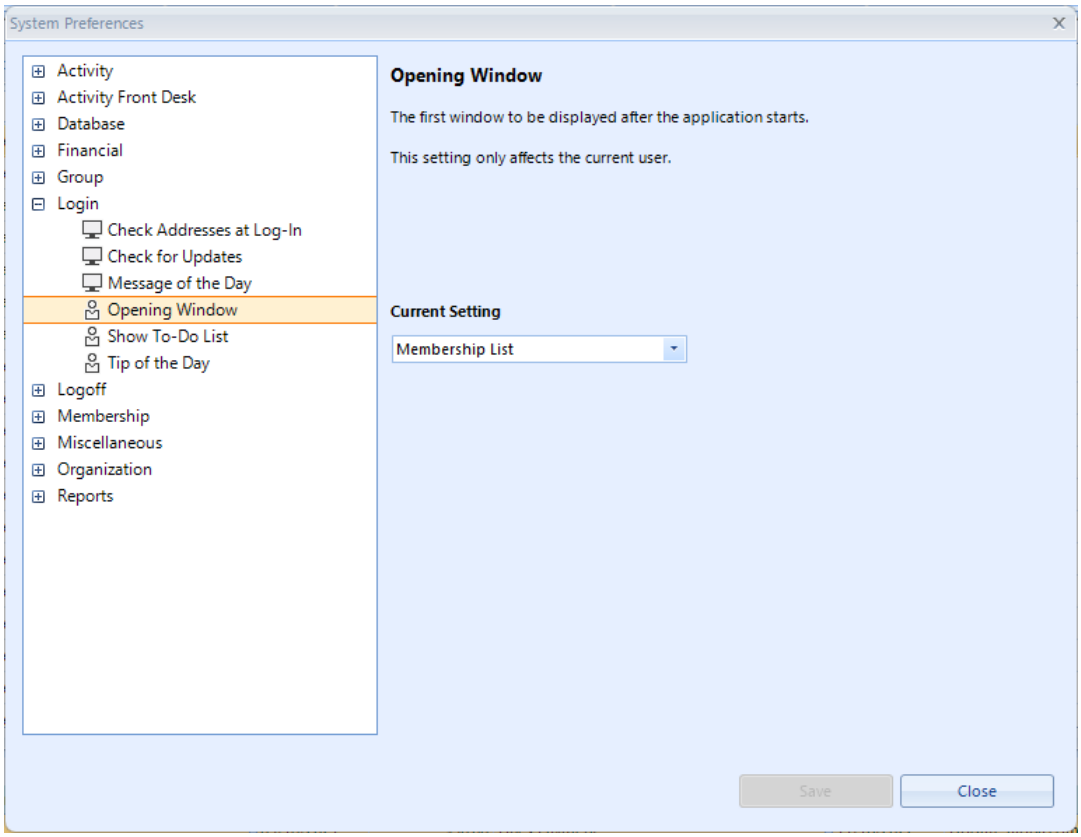
18.1 Preferences Overview

Many program settings and behaviors can be changed using Preferences.

The Preferences window is accessible via the Preferences button in the Settings section of the Home ribbon.



The Preferences window enables you to work with all preferences in the system. Just choose the desired preference on the left side, and the option(s) for that preference will display on the right side. Some preferences are set with a simple choice, others may have multiple settings.



Preferences are divided into categories representing the area of the application most affected by the setting. Things that do not fit a specific area of the application are found in Miscellaneous preferences. Within each category there are normally one or two types of preferences:

User Preferences - identified by the "user" icon, are specific to a given user name. If you log in as "bob" and set a user preference to "A", someone else can log in as "john" and set the same preference to "B". The system will use the appropriate setting based on whether Bob or John is logged in at the time.

System Preferences - identified by the "computer" icon, are global across the application, and apply to every user. Following the above example, if user "bob" logs in and changes a system preference to "A", and later user "john" logs in and changes the same setting to "B", the setting "B" will be used the next time Bob logs in as well, because John has changed the setting for everyone.

Note: In a multi-user installation, a change to a System preference made by one user may not be noticed by the other users until they log in again. This is because preference settings are stored in memory at Startup, and only refreshed from the database periodically.

If you're the only user on the system, then there isn't really any difference between User and System preferences. You just need to be aware that if you create a new user and start logging in under that ID, it will have its own set of preferences.

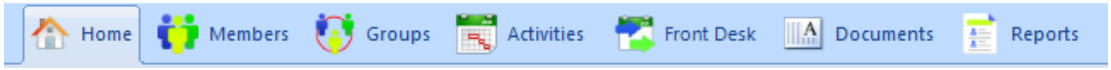
Note: your security settings may prevent you from editing system preferences

18.2 Activity Preferences

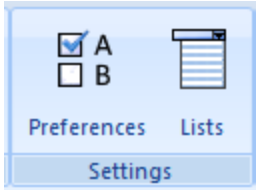
These preferences control various features of the Activity window. See Activity Overview for more details.

Setting Activity Preferences

1. Choose the Home workspace by clicking the Home tab above the ribbon.



2. In the Settings section of the ribbon, click Preferences



3. When the System Preferences window opens, expand the Activity section of the hierarchy on the left.

4. The following preferences are available:

   - Auto-Save Changes - controls whether the system saves the current record when you select a new page. This can speed data-entry, but it also means an

accidental change can be saved by mistake. The Save and Cancel buttons still work normally regardless of this preference.

- Start in Search Box - controls whether the search box above the list is automatically activated when the list is opened or refreshed.

5. Click Save after changing settings.

   Note: The Auto-Save Preference Changes preference controls whether the system saves each preference automatically when changes are made.

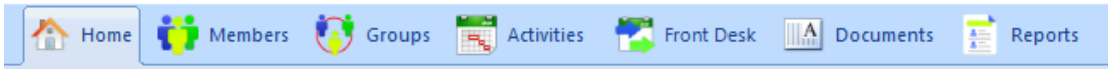
6. When finished, click Close.

18.3 Front Desk Preferences

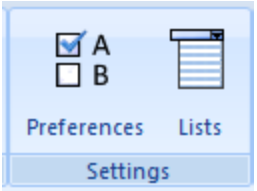
These preferences control various features of the Activity Front Desk window. See Front Desk Overview for more details.

Setting Activity Front Desk Preferences

1. Choose the Home workspace by clicking the Home tab above the ribbon.



2. In the Settings section of the ribbon, click Preferences



3. When the System Preferences window opens, expand the Activity Front Desk section of the hierarchy on the left.

4. The following preferences are available:

   - Allow Dues Entries - controls whether new dues entries can be created on the Front Desk window for the selected attendee. If enabled, a Dues icon will be displayed in the Member Synopsis area

   - End Date Validation - controls whether the Check In button should be disabled if the selected member has an End Date in the past.

   - End Date Warning - controls whether a warning message is displayed when the selected member has an End Date in the past. This message is only a warning; it does not prevent the user from proceeding. Use the End Date Validation

preference to stop the check-in entirely. Note that in Unattended Mode, the message will not be displayed.

- Limit Synopsis Data - controls whether personal information displays in the Member Synopsis area of the Front Desk window. If the person(s) using the Front Desk should not be allowed to view address and phone number information for attendees, enable this option.
- Multiple Check-In Warning - controls whether a warning message is displayed when a member tries to check-in prior to being checked-out of an existing entry on the same date. This can be used to prevent duplicate entries.
- Reset on Check-In - controls whether the system clears the search results and returns the cursor to the Favorite search field after a successful Check-In.

5. Click Save after changing settings.

   Note: The Auto-Save Preference Changes preference controls whether the system saves each preference automatically when changes are made.

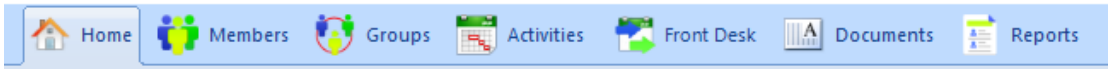
6. When finished, click Close.

18.4 Database Preferences

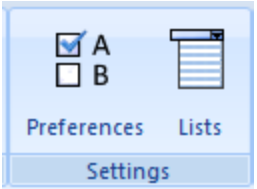
These preferences control various database behaviors

Setting Database Preferences

1. Choose the Home workspace by clicking the Home tab above the ribbon.



2. In the Settings section of the ribbon, click Preferences



3. When the System Preferences window opens, expand the Database section of the hierarchy on the left.
4. The following preferences are available:

- Allow Asterisk - controls whether an asterisk (*) is consider a wildcard character in searches along with the standard percent (%) symbol. i.e., "Smi*" is equivalent to "Smi%" when looking for all records that start with "Smi."

- Auto-Login - enables you to specify the user name, password, and/or database entry for the Login window. If you specify all three, the system will not stop at the window when starting MemberTies. Instead, the fields on the Login window will be completed for you using these entries, and the log in process will start automatically as if you had entered the values and clicked the button yourself. Note that if you use more than one user name, you probably shouldn't set all three options, or you won't be able to log in as anything different without changing the preference setting. These settings are stored in plain text in a configuration file, so do not use this if security is a concern.

  Note: this preference is considered to be user-specific, but it really is "computer" specific. Since the this preference obviously can't be stored in the database (because you'd have to log in before you could get to the data to see how you'd prefer to log in), it is stored in a configuration file on the computer. Thus, it is read and used prior to the database connection being established.

- Backup Prompt (Days) - specifies the number of days after which you want to be prompted to perform a database backup. When prompted, you can choose open the Database Toolkit to initiate the backup, or cancel the process. Set the value to zero (0) to prevent prompting.

  Note: regardless of the setting, you can always start a manual backup via the Database Toolkit.

- Backup Timeout - specifies the number of seconds the system will wait for the backup (or restore) process to finish before assuming that an error has occurred. The default is 120 seconds. If you have a very large database (or slow computer) and experience a timeout when running a backup or restore process, increase this value.

- Event Logging - controls whether the event logging system is active.

- File and Photo Storage - - controls whether member photos, and related files (i.e., files linked to members, groups, and activities) are stored in the database, or stored as links to the physical files. When setting this preference, you must specify the maximum file size that can be stored. The default is 50 KB each, and this is really a pretty large number. Most digital cameras take **very** large photos by default that would dramatically exceed the 50 KB limit; but, if you reduce the photo to a standard 1.5" x 2" wallet sized photo such as would appear on an ID card, the file size will be reduced as well. Other documents like text files, word processing and spreadsheet files, are normally fairly small.

  Note: Emails and logo files are always stored in the database regardless of this preference setting.

Storing files on the Computer, Good vs Bad:

- Good: Files on the computer means the database remains smaller, and photos and files will open faster because the file already "exists"
- Bad: Files on the computer can be lost; with multiple users, files must be on a shared network drive; when moving the database, all of the files as well and restored to the same directory path

Storing files in the Database, Good vs Bad:

- Good: files are always with the database, and backed up with the database, and multiple users always have access to the same files
- Bad: large files may slow down the database in some cases when opening them; a major database problem could corrupt files; large image files must be scaled down to conserve space

- Maintenance Prompt (Days) - specifies the number of days after which you will to be prompted to run table maintenance (sometimes referred to as "housekeeping") on the database. When prompted, you can choose to start the Database Toolkit to do the maintenance. Set the value to zero (0) to prevent prompting. The default value for this preference is 30 days.

  Note: regardless of the setting, you can always choose to run maintenance via the Database Toolkit.

- Stale Connection Threshold - the number of hours after which a database connection is automatically removed by the system. This is checked every time a user logs in, to see if other existing connections need to be removed.

5. Click Save after changing settings.

   Note: The Auto-Save Preference Changes preference controls whether the system saves each preference automatically when changes are made.

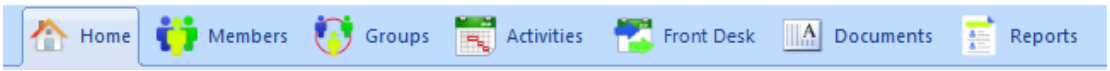
6. When finished, click Close.

18.5 Financial Preferences

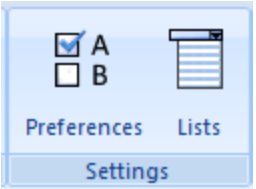
These preferences control various options associated with dues, donation, and activity postings. (Donation and Activity postings are only available with MemberTies Professional.)

Setting Database Preferences

1. Choose the Home workspace by clicking the Home tab above the ribbon.



2. In the Settings section of the ribbon, click Preferences



3. When the System Preferences window opens, expand the Database section of the hierarchy on the left.

4. The following preferences are available:

   - Allow Receipt Editing* - controls whether the Receipt Nbr and Book fields on posting records are editable. If this is off, the values are only generated by the Assign Now button, or by the system (see Display "Assign Now" option, below).

   - Application Fee - the application fee (if any) displayed on the Dues Calculator. This fee normally represents a one-time charge to new members of the organization. The Dues Calculator is accessible whenever new dues entries are being added to a membership record.

   - Debit/Credit Action* - controls the way debit and credit entries (Posting Types) affect accounts. This setting enables you to make them work according to your organization's accounting practices. Note that if you have existing posting entries, changing this setting may cause all balances to be recalculated.

   - Display "Assign Now" option - controls whether, when adding a posting using a Posting Type that generates a receipt, an "Assign Now" button will allow the receipt number to be generated and displayed immediately. If this option is off, the receipt number is not created until the posting is saved.

   - Receipt Book Numbers* - controls the optional "book number" assigned to receipt numbers generated by the system for various types of postings. The "book number" is a way of grouping receipt numbers together. It may represent a physical receipt book that has a finite number of pages, or you might use "2005" as the book number for all entries in the year 2005. This preference also enables you to change the receipt number that will be used next. That way, if you change the receipt book number, you can reset the receipt numbering to 1 to represent the start of a new book.

     The receipt book/number is used on postings when the selected posting type is one that generates a receipt.

   - Suggest New End Date - controls whether the system should automatically suggest a new End Date for the membership record when dues are added. The suggested date will be created in one of several ways, based on the preference setting.

You can then choose to ignore or apply the suggested date. This can simplify data entry if a typical dues payment is going to extend the membership by a standard number of months, or if everyone should get a known ending date.

Note: In the Professional version, an additional option lets you specify whether a new date should be suggested for debits, credits, or both posting type actions.

- Update Status - controls whether the Update Status switch is turned on by default when posting new dues entries.

5. Click Save after changing settings.

   Note: The Auto-Save Preference Changes preference controls whether the system saves each preference automatically when changes are made.

6. When finished, click Close.

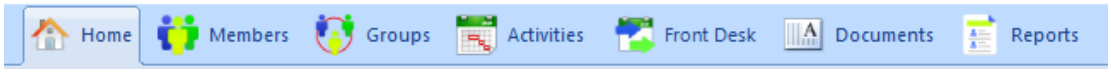
* Professional Version Only

18.6 Group Preferences

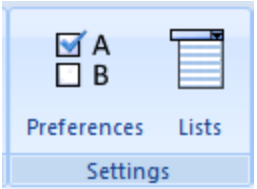
These preferences control various features of the Groupo window. See Group Overview for more details.

Setting Group Preferences

1. Choose the Home workspace by clicking the Home tab above the ribbon.



2. In the Settings section of the ribbon, click Preferences



3. When the System Preferences window opens, expand the Activity section of the hierarchy on the left.

4. The following preferences are available:

   - Auto-Save Changes - controls whether the system saves the current record when you select a new page. This can speed data-entry, but it also means an accidental change can be saved by mistake. The Save and Cancel buttons still work normally regardless of this preference.

- Start in Search Box - controls whether the search box above the list is automatically activated when the list is opened or refreshed.

5. Click Save after changing settings.

   Note: The Auto-Save Preference Changes preference controls whether the system saves each preference automatically when changes are made.

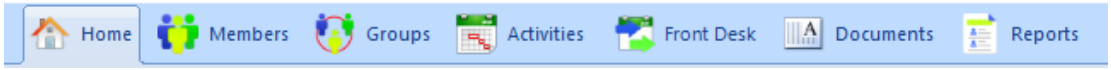
6. When finished, click Close.

18.7 Login Preferences

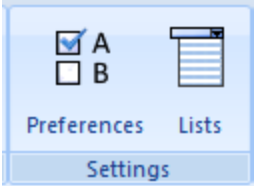
These preferences control behavior that occurs as you log in and the system starts.

Setting Login Preferences

1. Choose the Home workspace by clicking the Home tab above the ribbon.



2. In the Settings section of the ribbon, click Preferences



3. When the System Preferences window opens, expand the Login section of the hierarchy on the left.

4. The following preferences are available:

   - Check Addresses at Log-In - controls how often the system will verify that the correct address is marked "Active" based on available address date ranges. By default, this check occurs only once per day when you log in. This setting has no effect if address date ranges are not used. This preference is normally only changed if a large number of date ranges have been changed, or if the system date has been changed and you need the system to update immediately. In such a case you could change the setting to "Every Time", then log off and on again, then change the preference back.

   - Check for Updates - specifies the number of days after which you want the system to silently check for program updates. If an update is found to be available, a window will open and display the available update so you can choose whether to download it. Clicking, "Check Now" will open the Check for Updates window to do this immediately.

Note: By default, a minor build change is not announced as an update, because these changes tend to be limited in scope and may not apply to all users. i.e., a change from n.n.n.1 to n.n.n.2 is a minor bug fix build. If you want to be alerted to these updates as well, turn on the Include Minor Builds option. The Check for Updates window will still show the version is available, it just won't be announced or auto-installed (see below).

The "Automatic Install" option can only be changed by the mtadmin user. See Automatic Updates for details about this feature.

- Message of the Day - controls the message displayed to all users after the log in. Access to this preference can be controlled by a special Security Setting.
- Opening Window - controls the window that is first displayed when the application starts. You can choose any workspace, or None, which means the system will start with only the Home ribbon bar.
- Show To-Do List - controls whether the To Do List is displayed automatically when there are outstanding To Do items.
- Tip of the Day - controls whether the Tip of the Day is displayed automatically.

5. Click Save after changing settings.

   Note: The Auto-Save Preference Changes preference controls whether the system saves each preference automatically when changes are made.

6. When finished, click Close.

Window Order at Startup

For reference, the actual order in which windows appear after login is:

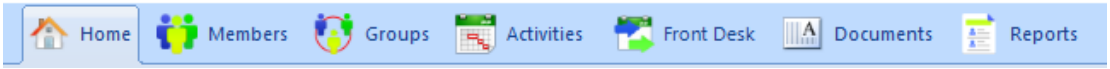
1. To Do List (if open items are available) appears until closed
2. Opening window
3. Tip of the Day (if enabled) appears above the opening window

18.8 Logoff Preferences

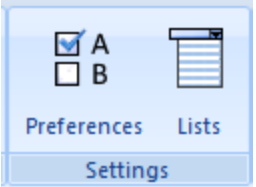
These preferences control behavior that occurs as you log off or exit the system.

Setting Logoff Preferences

Choose the Home workspace by clicking the Home tab above the ribbon.



1. In the Settings section of the ribbon, click Preferences



2. When the System Preferences window opens, expand the Logoff section of the hierarchy on the left.

3. The following preferences are available:

   - Auto Delete "(Delete)" Status - controls whether any membership record with a status of (Delete) is permanently deleted when the application closes. See Statuses for more information about the (Delete) status. Note that the "Prompt Before Deleting" preference (see below) controls whether you are notified before this occurs.

   - Automatic Logoff - controls whether the system will automatically return to the Log In window after a specified period of inactivity. If used, the timeout period must be at least 1 minute. This can provide a measure of security against snooping if the system is located in a public area.

   - Prompt before Deleting - controls whether a message will appear asking you to confirm the automatic deletion of membership records that have a status of (Delete). If you do not allow the deletion, the records will be left in the database. Note: If the"Auto Delete (Delete) Status" preference (see above) is not active, this preference has no effect.

4. Click Save after changing settings.

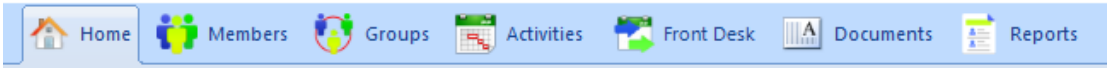
   Note: The Auto-Save Preference Changes preference controls whether the system saves each preference automatically when changes are made.

5. When finished, click Close.

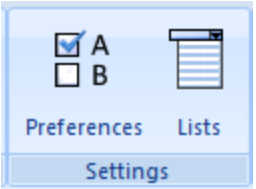
18.9 Membership Preferences

Setting Membership Preferences

1. Choose the Home workspace by clicking the Home tab above the ribbon.



2. In the Settings section of the ribbon, click Preferences



3. When the System Preferences window opens, expand the Membership section of the hierarchy on the left.

4. The following preferences are available:

   - Auto-Save Changes - controls whether the system saves the current record when you select a new page. This can speed data-entry, but it also means an accidental change can be saved by mistake. The Save and Cancel buttons still work normally regardless of this preference.

   - Check for Duplicates - controls whether the system checks the database for potential duplicates when saving a new member record.

   - Clear Dues Entries on Expire - controls whether a records associated dues entries are deleted when the record is automatically updated to an inactive status (based on status settings)

   - Default End Date - controls the default entry in the End Date field on all new membership records.

     - If you choose to set a number of months to add to the Start Date, the End Date will be blank until the Start Date is entered.

     - If you choose to set a month and day combination, the system will check to see whether the day has already passed before using it. In such a case, the date will be moved to the following year. If the selected date is February 28th, and the current year is a leap year, the date will be changed to February 29th.

   - Default Start Date - controls the default entry in the Start Date field on all new membership records.

     - If you choose to use the Current Date, the Start Date will always be set to the current system date at the time the record is created.

     - If you choose to set a month and day combination, the system will always set the year to the current year, even if the date will be in the past. i.e., a setting of Feb. 15 will always be entered as Feb. 15, of this year for every record created anytime this year.

   - Delete Action - controls what happens when a membership record is selected and deleted. There are two possible outcomes:

- If you choose to Delete Immediately, after you confirm the deletion the record will be permanently removed from the database. This is the normal behavior of the system.
- If you choose to Change Status, then the system will change the record's status to "(Delete)". Any record set to this status will be permanently deleted by the system when you exit MemberTies (unless you have set the Auto-Delete preference to prevent this). Thus, the Delete Action preference essentially gives you a chance to change your mind, because prior to exiting the system you can still change the record to some other status and prevent deletion.

- Member IDs
  - Member ID Prefix - if specified, the system will automatically begin each new Member ID with the desired prefix text. If Member IDs have been preloaded, the prefix value will be added to the preloaded ID value when it is selected for use.

    Note: if this preference is used, the Require Numeric IDs preference will automatically be turned off.
  - Recycle Preloaded IDs - controls whether a pre-loaded member ID that has been used will be marked as Unused if the corresponding membership record is deleted. For example, if preloaded ID number 100 was assigned to a membership record (and therefore marked as Used), it would normally remain unavailable for reuse forever. If this preference is enabled, then when the membership record using that ID is deleted the ID will be marked as Unused and will be selected again when a new record is created. This can be helpful if your organization has a finite pool of ID numbers and the order in which they are used does not matter (i.e., if it is ok that ID 100 might get assigned to a new record that would otherwise have been number 1923 had ID 100 not been marked as Unused again).
  - Require Numeric IDs - controls whether non-numeric data can be used in the Member ID field on membership records. In addition, if numeric IDs are required the Member ID column will use a numeric sort when it appears on the Membership List or a report. Otherwise, the column will use an alphanumeric sort. (To understand the difference between a numeric and alphanumeric sort, consider the following list of numbers:

    1, 5, 11, 12,14, 100

    A numeric sort will maintain this numerical order: 1, 5, 11, 12,14, 100
    But an alphanumeric sort will change the order to: 1, 100, 11, 12, 14, 5

    You may need to close and reopen the Membership List for sorting changes to take effect.

    Note: if this preference is turned on, the Member ID Prefix will be cleared

  - Require Preloaded IDs - controls whether a pre-loaded ID is required in order to create a member record. If there are no remaining pre-loaded IDs, no more members can be created.
  - Show System ID - controls whether the internal system ID is displayed on the General Info tab of the member record

- Middle Initial Period - controls whether the system automatically appends a period to single-character middle initial entries on member and friend/family records. (This punctuation goes against postal addressing standards.) Changing this preference will update all applicable records to add or remove the period as applicable.
- Private Field Labels - controls the label used for each of the available private fields on member records
- Reset Copied Item Date - controls whether the primary date field (Date1) on an assigned item is set to the current date when a copy is made. If this is off, the copied item will exactly match the original item. This is designed to simplify item entry where a member is assigned an item repeatedly, and the date needs to be set to the date it was assigned every time.
- Reset End Date - controls what happens when the expiration behavior of a Status is based on the End Date, and it causes the system to change the status of a membership record. By default, the system will reset the End Date of the affected record to the date the status change occurred. This is designed to allow the grace period of a subsequent status to begin calculating from the date the member actually changed to the new status. If you would prefer to have all calculations use the original End Date, turn this preference off.
- Set Flag on New - controls whether the system automatically turns on the Flag switch when creating a new membership record. This can enable you to easily query for new records if you need to run a special report or mailing list for new members.
- Start in Search Box - controls whether the search box above the list is automatically activated when the list is opened or refreshed.
- Starting Field - controls where the cursor begins in new membership records: the First Name field or Prefix. If the Prefix field is rarely used, choose the First Name option to speed data entry

5. Click Save after changing settings.

   Note: The Auto-Save Preference Changes preference controls whether the system saves each preference automatically when changes are made.

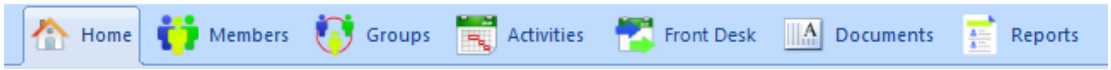
6. When finished, click Close.

18.10 Miscellaneous Preferences

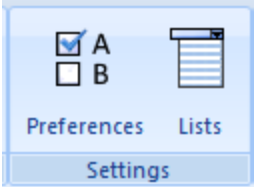
Miscellaneous Preferences either apply to more than one area of the application, or just do not merit a category of their own.

Setting Miscellaneous Preferences

1. Choose the Home workspace by clicking the Home tab above the ribbon.



2. In the Settings section of the ribbon, click Preferences



3. When the System Preferences window opens, expand the Miscellaneous section of the hierarchy on the left.

4. The following preferences are available:

   - Auto-Save Preference Changes - controls whether changes to a given preference are saved as soon as the selected preference changes. When this is on it can simplify clicking through and making changes to multiple preferences.

   - Default Browser - sets the web browser used for opening help pages or other websites. By default, the Windows default is used, but some users may have html files set to open in a text editor or something similar. This enables you to define an actual web browser, i.e., Edge, Chrome, etc.

   - Default Item Date - controls whether the date on new items defaults to the current date

   - Folder Locations - controls the default file location used for exports, imports, backups, downloads, attachments, etc.

   - Language - sets the language used for certain words. Essentially changes "check" to "cheque", "ZIP Code" to "Postal Code", etc. between US and UK English.

   - Remove Blank Lines* - controls whether, on a document or email, a line is automatically removed if it only contained an embedded field and that field value is blank.

   - Save Window Settings - controls whether the system should save the size and position of windows when they are closed. If you frequently switch between a

small and large screen, or different resolutions, it may help to leave this turned off.

5. Click Save after changing settings.
6. When finished, click Close.

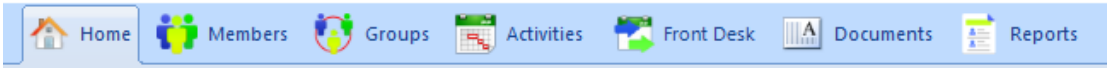
* Professional Version Only

18.11 Organization Preferences

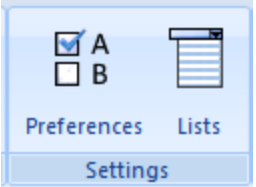
These preferences help the system know how your organization works.

Setting Organization Preferences

1. Choose the Home workspace by clicking the Home tab above the ribbon.



2. In the Settings section of the ribbon, click Preferences



3. When the System Preferences window opens, expand the Organization section of the hierarchy on the left.
4. The following preferences are available:

   - Name of Organization - sets the name of the your organization as it should appear on all reports. If you have a license and have applied it to a database profile, the organization name on the license is automatically used and cannot be changed.

     See Registering for more information about registration and licensing. See Maintaining Database Profiles for information about applying licenses to database profiles.

   - Return Address - controls the return mailing address for the organization. This address is used in conjunction with the organization name on account statement reports, for example.

   - Year Begin Month - controls the month on which the organization's year begins. This is used on the Dues Calculator when prorating dues, and for the "Fiscal Year" date ranges (i.e., current fiscal year, etc.). If this preference is not set, the default is January.

5. Click Save after changing settings.

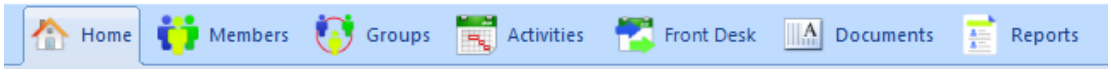
   Note: The Auto-Save Preference Changes preference controls whether the system saves each preference automatically when changes are made.

6. When finished, click Close.

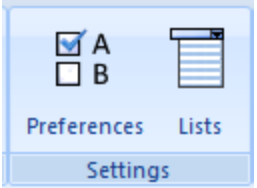
18.12 Report Preferences

Setting Report Preferences

1. Choose the Home workspace by clicking the Home tab above the ribbon.



2. In the Settings section of the ribbon, click Preferences



3. When the System Preferences window opens, expand the Reports section of the hierarchy on the left.

4. The following preferences are available:

   - Auto-Open List - controls whether the Choose Report window opens immediately when accessing the Reports workspace

   - Default Logo - sets the default logo graphic that will be displayed on all system and user-defined reports that can display a logo. The graphic should be square, roughly 144 x 144 pixels. Note that any shape of logo can be stored as a square graphic. Just create a square white box, and place the logo inside it. If you don't include a border on your image, nobody will be able to tell that the white space is part of the image

   - Extra Label Info

     - Custom Text - text to display in the upper right corner of system mailing labels if the Info Type is set to Custom Text. This value is ignored for all other Info Type settings.

     - Info Type - the type of information to display in the upper right corner of system mailing labels. If Custom Text is selected, the label will show the value set in the Custom Text preference.

- Hide Default Country - controls whether the system will prevent the country name or code from displaying on addresses if the country matches the default country code. See Countries for more information. If you have set the default country to be your own country of residence, selecting this option essentially means the country will only be displayed for foreign addresses.
- Show Company Name - controls whether the company name is shown along with the member name.
- Tag Line - controls the default tag line to be displayed at the bottom of printed reports
- Use Alt Name - controls when the Alt Name on a member record takes precedence over the first/last name on reports. This can be set specifically for Cards, Labels, and General system reports, as well as for user reports & views.

5. Click Save after changing settings.

   Note: The Auto-Save Preference Changes preference controls whether the system saves each preference automatically when changes are made.

6. When finished, click Close.

Part XIX

Reports

19 Reports

19.1 Reports Overview

MemberTies includes a selection of predefined reports, designed to provide printed access to the most common information. There are, of course, hundreds of ways you might choose to use the system to track your data, especially when you consider the options available with custom fields or Categories & Items.

If you are in need of a special report that is not available and cannot be created using the user-defined reports capabilities in MemberTies Professional, let us know. If the report you need makes sense for general public distribution, we'll probably add it to the system. Otherwise, we can create reports to meet specific requirements as "custom reports" for a fee.

When you select a report, a "Settings" window will normally appear to enable you to choose the records that will be used in the report, and to control various settings specific to the report you chose. Often this is only the title, but others, such as an Account Statement, or Summary report have many options to control the display.

Normally the most important thing is the search criteria that controls which records are displayed on the report (i.e., a criteria might be, "City = My Town" to only display members of a particular city. The system remembers the settings you selected from one use of a report to the next, and you can also save and reload search criteria like other search windows.

How Do I Create a _____ Report?

One of the most common support questions is something like, "How do I create a Past Due Members report?" or, "How do I create a Dublin Members report?" The answer is, you don't create a report like that. What you *do* create is a report that includes the fields you want to show, and then you use report **Search Criteria** to determine what the report really means. For example, a simple columnar report that includes just the First and Last Name and Home Telephone Number can easily be:

- A past-due members contact list -- by using search criteria to only retrieve members with an End Date in the past.
- A Dublin members contact list -- by using search criteria to only retrieve members with a City of Dublin.
- An "activity attendee" list -- by using search criteria to only retrieve members who attended a specific activity.
- An honorary members list -- by using search criteria to only retrieve members with the Honorary status.

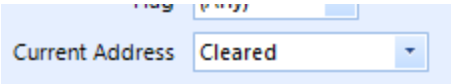
The idea is simply that when you define a report, you are defining the *presentation* of the data, not the *meaning* of the report. Of course you may want certain fields to show *because* of the

way you plan to use it, but the key thing to remember is that the search criteria that determines what kinds of records are found, and therefore what the report really "means."

The "Active Address"

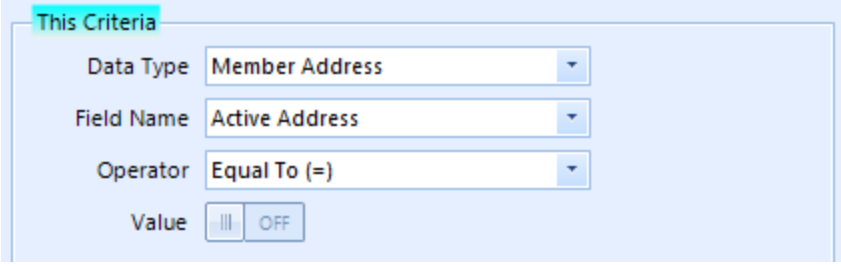
MemberTies Professional enables you to save multiple addresses per membership record. If the report you are printing includes address data the system must make an association between the main data (say membership name information) and address data. To do this, the system needs to know which address to use in the event that more than one is available.

By default, whatever address is currently "Active" (based on a date range, or simply the Active switch on the address) is the one that will be used. However, if a Settings window is available for the report, a basic criteria called "Active Address" enables you to specify whether you want the address that is active, or the address(es) that are not active.



Basic Search Option

The same thing can be done with an Advanced search, by choosing the Active Address field.



Advanced Search Option

Preview Mode

To display the report in "Preview Mode," click the Preview button in the Printing section of the ribbon. This toggles the view between preview and normal modes. When preview mode is off, the page count displayed on the report represents the "screen pages", i.e., what can be seen on the screen at one time is considered to be a "page." To see how many pages a report will actually be when printed, turn preview mode back on.

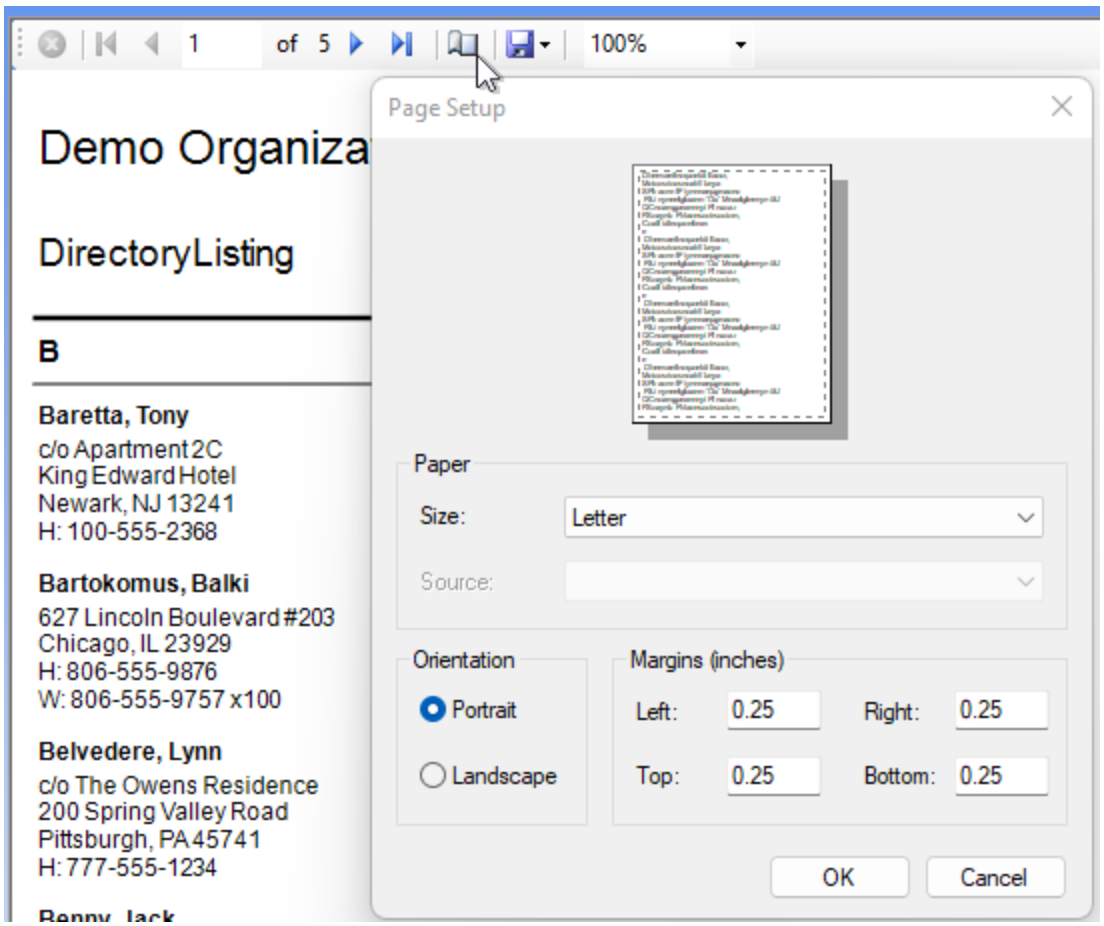
Note: Multi-column reports will display as a single long column if preview mode is turned off, because it disables the formatting.

Report Logo

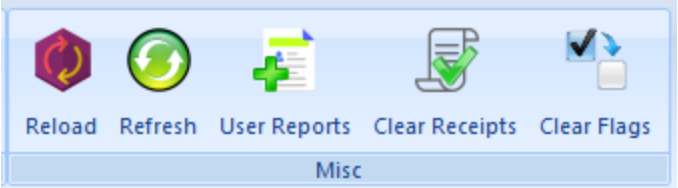
The logo set in the Default Logo report preference will automatically appear on system and user-defined standard reports, rosters, directories, and cards.

Report Margins

Printers vary widely. The system uses a general setting for report margins designed to accommodate most printers. If your reports print incorrectly, use the Page Setup button in the editor ribbon to access these settings.

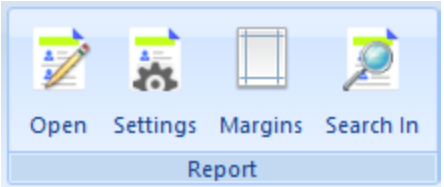


Misc Ribbon Options



- Refresh - to re-retrieve the report using the current settings
- User Reports* - to manage user defined reports
- Clear Receipts - to clear all of the Print Receipt flags on all records

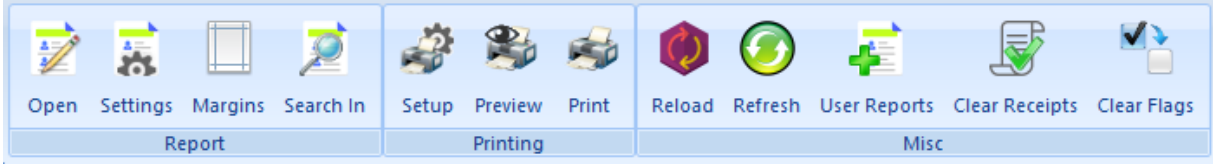
Report Ribbon Options



- Open - to open a specific report
- Settings - to go back to the report settings window
- Search In - to find text anywhere in the report

19.2 Reports Ribbon Bar

The ribbon enables you to access report functionality that isn't part of the actual report engine (which has its own toolbar).



The Reports Ribbon

The general use of each button is described below. Click any option to go to the help for that area.

- Open - open an existing report
- Settings - opens the Settings window for the report to modify search criteria or other settings
- Margins - opens the Margin Settings window for the report to modify or reset any report margin.
- Search In - search for text anywhere in the report
- Setup - opens the printer setup window for the current printer
- Preview - toggles the report display between Normal and Print Preview modes. **Note**: Multi-column reports only display the formatted columns in preview mode.
- Print - prints the active report

- Reload - rebuilds the report using it's definition (most useful when modifying a user report) and then retrieves data using the current settings
- Refresh - re-retrieves data for the report using the current settings
- User Reports* - opens the User Reports list
- Clear Receipts* - clears all print receipt flags in the database that were set to enable a bulk printing
- Clear Flags - clears the general Flag field on all membership records

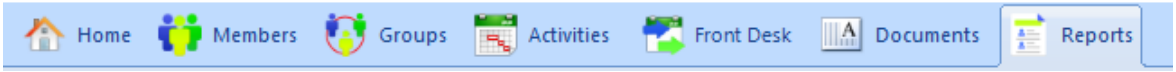
* Professional Version Only

19.3 Working with Reports

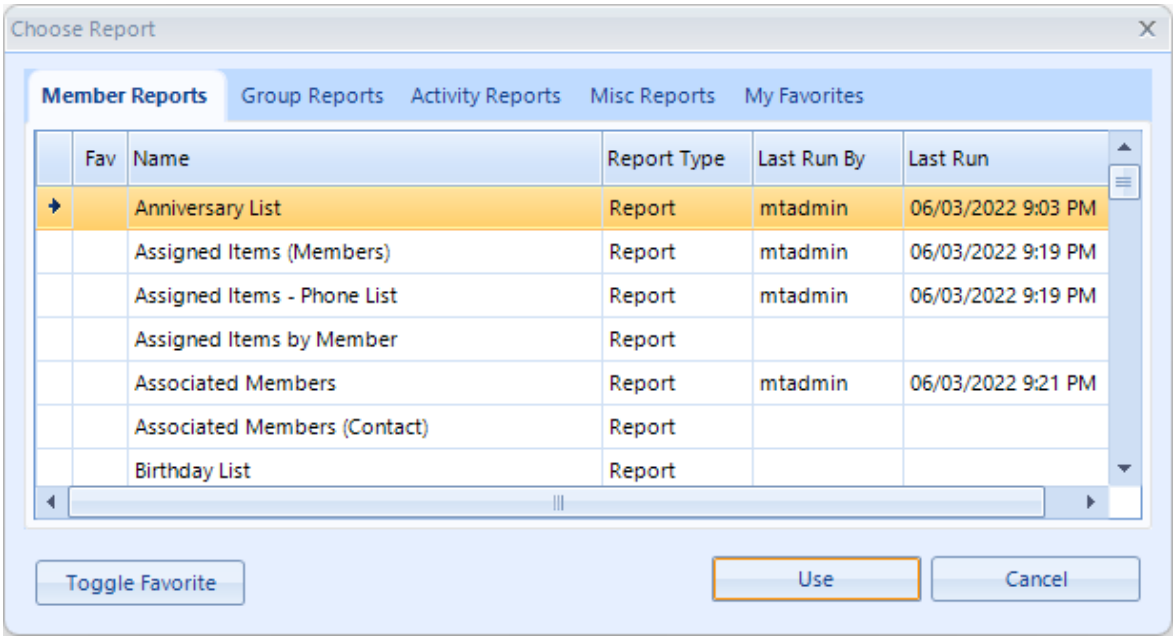
The Reports window enables you to view and print system-defined reports, as well as manage, view, and print User Defined* reports.

Working with Reports

1. Choose the Reports tab from the ribbon bar.



Note: When the Reports window opens, the Choose Report window opens automatically so you can select a report. To disable this behavior, turn off the Auto-Open List report preference.



2. The list of reports is divided by workspace, with some reports that cross workspaces (such as postings) or lists, under Misc Reports.

   The list includes several important columns besides the obvious name and type of the report:

   - Fav - a check mark appears in this column when the report has been marked as a Favorite. The report will also appear in the My Favorites list.

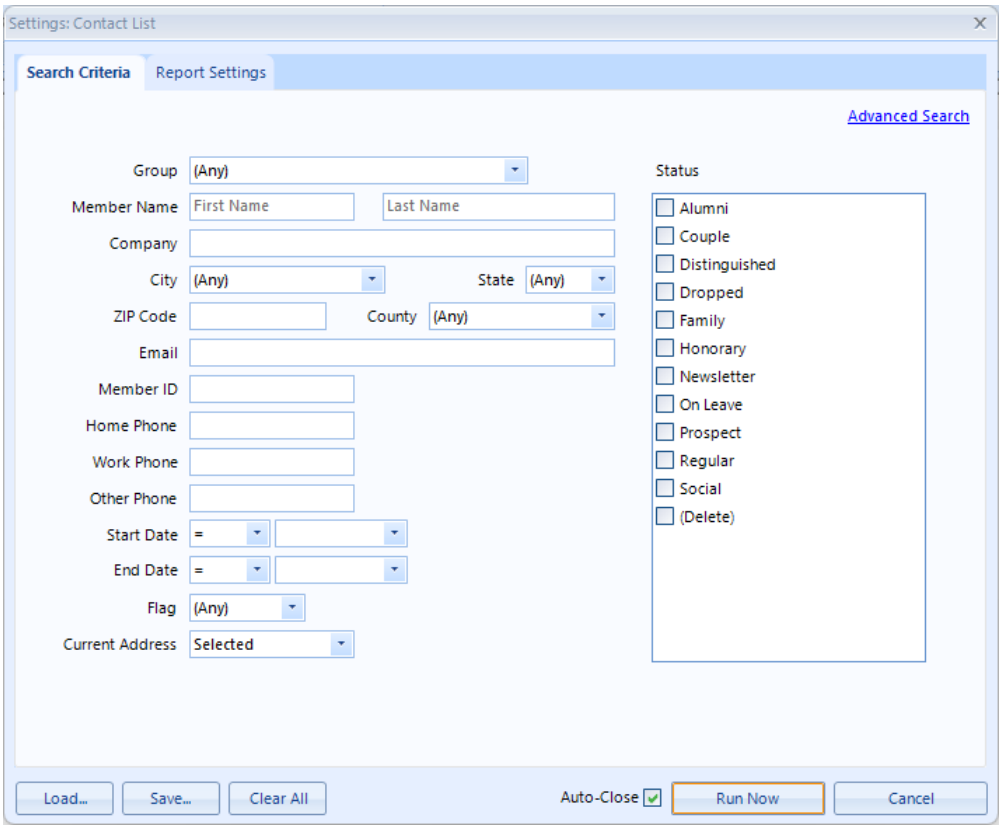
     Note: If you have at least one report marked as a Favorite, the Choose Report window will open directly to the Favorites tab.

   - Last Run By - displays the user name of the last person to run the report

   - Last Run - displays the date the report was shown on screen

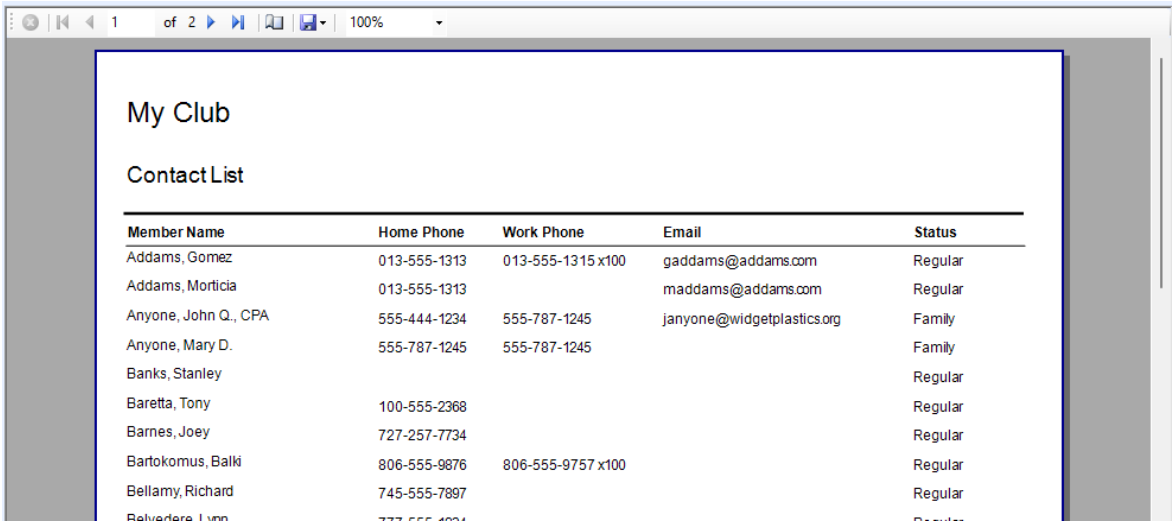
   - Toggle Favorite - adds the selected report(s) to the My Favorites list.

3. Select the desired report and click Use.



4. The Settings window will open with options for the report. Typically the window has two tabs, one for setting the search criteria, and one for any report-specific options, such as the Title, or the starting position for labels and cards.

5. When you are ready to retrieve records for the report, click Run Now. By default, without any search criteria, the system will retrieve all available records and display the report. To restrict which records appear, see searching for information about using more specific basic and advanced searches.



Member Name	Home Phone	Work Phone	Email	Status
Addams, Gomez	013-555-1313	013-555-1315 x100	gaddams@addams.com	Regular
Addams, Morticia	013-555-1313		maddams@addams.com	Regular
Anyone, John Q., CPA	555-444-1234	555-787-1245	janyone@widgetplastics.org	Family
Anyone, Mary D.	555-787-1245	555-787-1245		Family
Banks, Stanley				Regular
Baretta, Tony	100-555-2368			Regular
Barnes, Joey	727-257-7734			Regular
Bartokomus, Balki	806-555-9876	806-555-9757 x100		Regular
Bellamy, Richard	745-555-7897			Regular

6. The report display has its own miniature toolbar containing several options, described below:

- Cancel - cancels the retrieval of a very large report. Use this if you make a mistake in your search criteria and it seems to run endlessly. Then click the Settings button on the ribbon and check your search criteria.
- Paging - these enable movement through a long report: First Page / Previous Page / Go to Page / Next Page / Last Page
- Export - allows saving the report to various file formats
- Zoom - changes the magnification of the report.

7. To print the report, click Print on the main ribbon.

Notes

There are two additional buttons on the main ribbon in the Reports section that may be useful:

- The Search In button enables you to search all pages of a report for specific text.
- The Margins button enables you to modify or reset any report margin.

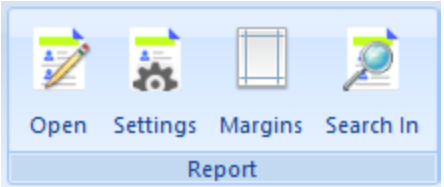
19.4 Changing Margins

You can adjust the margins of any report, and the new settings will be saved for your user only. This enables you to tweak settings if necessary for your printer. Note that system reports are designed with specific margins and changing them may affect usability or the ability to print successfully.

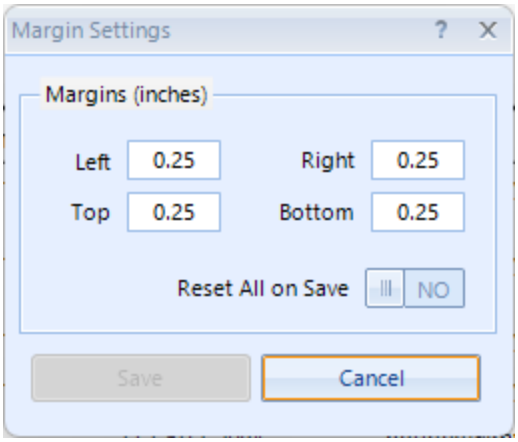
Changing Report Margins

1. Display the desired report on-screen. See Working with Reports if you haven't opened a report before.

2. In the Reports section of the ribbon, click Margins.



3. The Margin Settings window will open.



4. The following fields are available

   Note: The heading above the margin values indicates whether the units are in inches or mm.

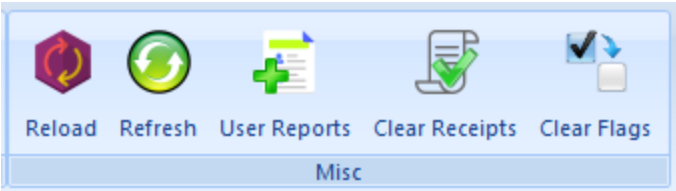
   - Left - the setting for the left margin
   - Right - the setting for the right margin
   - Top - the setting for the top margin
   - Bottom - the setting for the bottom margin

- Reset All on Save - select to reset all margins to their default values.

5. When you're finished, click Save.

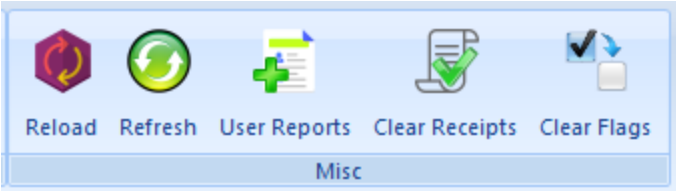
19.5 Clearing all Print Receipt Settings

If you want to clear the Print Receipt field on all posting records in the database at once, you can do so using Clear Receipts button on the Reports ribbon.



19.6 Clearing all General Flags

If you want to clear the Flag field on all member records in the database at once, you can do so using Clear Flags button on the Reports ribbon.



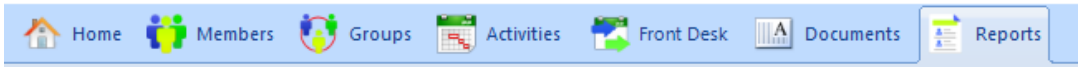
19.7 Printing

All reports are essentially printed the same way. You simply choose the report you want, retrieve it using any appropriate criteria or settings, and then print. All reports print by generating a PDF document, which you can then send to a printer, save, or even edit if you have your own editing software installed.

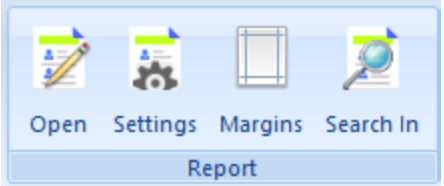
Note: If you are printing a report that is laid out in rows and columns (such as labels), and need the report to start printing on a specific one, the report settings includes a Starting Position field. The printing order is top-to-bottom, left-to-right, so on a 2 column, 10 row layout, the first label in column 2 would be position 11.

Printing a Report

1. Choose the Reports tab from the ribbon bar.



2. If the Choose Report window does not open automatically, click the Open button in the Report section of the ribbon.



3. Select the desired report.
4. When the Settings window opens, enter the appropriate search criteria to retrieve the records you want to see on the report. See Search Overview for details.
5. Click Search and the records found by the search will be displayed on the report.
6. In the Printing section of the ribbon, click Print.

Note: You can click Setup to open the print setup dialog if you want to change any printer settings without actually printing.

19.8 Troubleshooting

This topic is intended to provide answers to the most common problems/questions surrounding reports.

If the answer isn't here, be sure to look at available Report Preferences.

Problem	Solution
Columns too Narrow	System Reports: Column widths on system reports are set at the most common width. It isn't possible to support all possible data on a generic report. If you find a column is grossly off on all records, contact support and we'll see what we can do.

	User Defined Reports: Column widths default to a generic width, but you can set the width of any column using the Preview tab when maintaining the report. See Working with User Defined Reports for more information.
Duplicate Records	Typically, the criteria used, combined with the type of report causes certain records to be matched twice. For example, if a normal membership report such as the Contact List is run using dues criteria like "Dues Amount Posted = 10.00", it may show a member once for every 10.00 posting on the member's record. The only solution is to add more criteria to restrict the search more tightly. For example, you may only want to see 10.00 postings in February, not for all time.
Label Not Available	If you need to use an label format that we don't have listed, contact support and we can add it to the system. We will need to be able to look up the label specifications somewhere.
Margins Incorrect	Use the Margins option to modify the margins. See Changing Margins for details.
Missing Records	Usually caused by one of the following: 1 The criteria used for the search is excluding them. i.e., a criteria like "City = Dallas" will exclude any member in any other city. Also, criteria like, "City = Dallas AND City = Austin" will eliminate all members, because it is requiring a member be assigned to both cities at once! In this case, the correct criteria would be, "City = Dallas OR City = Austin" to see members from either city. 2 The "Include on Reports" or "Include in Mailings" switch is turned off on the member record(s) in question. Clearing these check boxes will automatically exclude a member from a report or mailing label, respectively, unless you explicitly use the Include on Reports or Include in Mailings field in your criteria. i.e., if you have "Include in Mailings = Any" as a criteria on a label report, then it doesn't matter what the switch is set to on the member record.

Multi-Column Report Shows as One Column	Multi-Column layouts only display as multiple columns in Print Preview mode, but in normal mode it will just show the data as one long column.
Text Cut Off	The "preview" display sometimes shows the top or bottom edge of text slightly cut off, especially on reports where the number of lines per record varies (i.e., on a roster or mailing label). This normally has no effect on the actual printed output, and turning off Preview mode normally shows the text is all there.
Too Many Records	Usually caused by incorrect criteria, or not using any criteria. The search criteria is what limits the records displayed on the report. By default, every report displays every possible record in the system. So a membership report will show all members that apply to the report. But criteria like, "Dues Balance > 100.00" will limit the report to members dues where the sum of all postings is greater than 100.00.
Database Error	This rarely happens, but when it does it normally means you have found a combination of criteria that the system didn't expect or didn't handle correctly, so it didn't write the internal query correctly. Contact support ad explain the search you used, and we will be able to correct the problem.

19.9 Report Descriptions

19.9.1 Member Reports

Anniversary List

This report provides a list including the anniversary date, name, and membership status of members..

Note: only members with an anniversary date can appear on the report.

Assigned Items (Members)

This report lists all items, and for each item, shows the members that have been assigned the item.

On each report, the number in parenthesis next to the category, item or member/group name indicates the total number of items assigned beneath it. The categories and items displayed on this report is sorted according to the Ranking set up for each. See Categories & Items for details.

Assigned Items by Member

This report lists all Members, and for each member, shows the items that have been assigned.

On each report, the number in parenthesis next to the category, item or member/group name indicates the total number of items assigned beneath it. The categories and items displayed on this report is sorted according to the Ranking set up for each. See Categories & Items for details.

Assigned Items - Phone List

This is similar to the Assigned Items (Members) report, but it includes phone contact details.

On each report, the number in parenthesis next to the category, item or member/group name indicates the total number of items assigned beneath it. The categories and items displayed on this report is sorted according to the Ranking set up for each. See Categories & Items for details.

Associated Members

This report provides information about established relationships between membership records. This report is most useful when run for a specific member, or other criteria that limits the number of members found. Otherwise, each member will appear twice, once as the "main" member, and again elsewhere as the "related" member to a different main member.

Associated Members (Contact)

This report is similar to the associated members report, but includes more contact information.

Birthday List

This report provides a list including the birth date, name, and membership status of all membership records with a birth date set.

Birthday List (+Family)

This report is similar to the Birthday List, but any Friend/Family records are displayed and sorted within the list by birth date. These entries include the association type (son, daughter, etc.).

Compact Membership List

This report is a "minimal" listing of basic address and phone number information. It provides name, home phone, email address, street address, city, state, and postal code in a columnar format. This report will not work for you if your address data is longer than average.

Compact Membership List 2

This report is similar to the Compact Membership List report, but it includes different set of fields -- the Status, Home Phone, Email Address, End Date, and Include in Mailings fields.

Contact List

This report lists basic membership contact information. It provides name, home phone, work phone, email address, and membership status in a columnar format.

Contact List (+Family)

This report lists basic membership contact information, including the names of any Friend/Family records. It provides name, home phone, work phone, email address, and membership status in a columnar format.

Friend/Family names are listed with the main member, indented slightly, and include the association type (son, daughter, etc) and contact name/number.

Directory Listing (2, 3, 4 column)

There are multiple variations of the Directory Listing report, splitting the page into two, three, or four columns, plus a "photo" version that is a two column directory with a small member photo on the left side of the block of information. You can choose the best report for your needs based on the format of your data (length of addresses, etc.). All reports include name, address, phone, and email data.

The report is similar to the Roster reports, but contains more information. The Directory Listing includes separators at each break in the alphabet, i.e., at the beginning of last names beginning with "A", "B", "C", etc.

Note: The on-screen display of the directory listing report often appears to be incorrect due to the amount of formatting needed to create and organize the columns of data. Such problems rarely appear in the printed version.

Donation Receipt

The receipt report can be generated for one or more posting records. It is formatted such that the member's address will appear in a standard window envelope, and the return address of your group is displayed on the report. (If you haven't set your group's return address, see Organization Preferences.)

If you have marked entries for receipt printing by selecting the "Mark for Printing" option for the "Print Receipt" field, you can use report criteria similar to:

```
Print Receipt = ON
```

to retrieve all of the marked records

Donation Summary

This report provides a quick total of donations by month. Use report criteria to limit the report to certain donation types, months, etc.

Donations by Date

This report groups donations by the donation date, and for each date provides details about the member who made the donation (name, id, cheque number, comments, and amount).

Donations by Member

This report groups donations by the member name, then by posting type, and within each posting type lists donations by date. The date, cheque number, comments, and amount are displayed.

Dues Account Statement

This report is designed to be sent to your members. It is formatted such that the member's address will appear in a standard window envelope, and the return address of your organization is displayed on the report. (If you haven't set your organization's return address, see Organization Preferences.)

The upper portion of this report includes the member ID (labelled "Account Number") and their current account balance. The lower portion of the report is their statement of account, showing account history.

When this report is selected, an additional Options tab is available on the Report Settings window, with the following settings:

- Statement Text - Optional texts to display above or below the statement.
- Include Remittance Advice - Select this option to display a "tear off" remittance form for the recipient to use to return a payment.
- Return Address - The return address to display on the Remittance Advice. This enables you to provide a different location for collection of payments rather than the default return address specified in report Preferences.
- Include Friends/Family - Select this option to display a list of the member's friends/family names and relationships.
- Include Balance Forward - Select this option to sum all postings prior to a specified date and print it on the report separately from the postings following that date. This setting is designed to avoid displaying the entire posting history of a member. For example, you could sum everything prior to the end of the previous year, and display only entries for this year.

  After selecting the Include Balance Forward option, the following fields must also be set:

- Date: The Date Recognized to use for the balance forward calculation. All postings ON or BEFORE the date will be summed and displayed with your Label. Postings shown

on the rest of the report will be limited to those with a Date Recognized AFTER the date. (Other criteria can still be used, but the Date Recognized > YourDate will be added automatically behind the scenes.

- Label: The text to display to the left of the balance. If you choose a date of 12/31/2012, you might want text like "Balance forward as of 1 January:" but the choice is yours.

Dues Account Statement 2

This report is identical to the Dues Account Statement report, except it is formatted slightly differently to include the status from the dues entry.

Dues Balance

This report displays the name, ID, phone number, email address, and the sum of all dues postings that fall within the report criteria for each member. In other words, if you include report criteria that limits the Date Posted or Date Recognized to a particular range of dates, the balance will be calculated based on those dates. If no date range criteria us used, the balance will be calculated for all dues postings (for that member).

Dues Balance Detail

This report is similar to the Dues Balance report, but includes the postings that make up the balance entry.

Dues Postings

This report lists basic dues posting information (name, check, amount, status)

Dues Receipt

The receipt report can be generated for one or more posting records. It is formatted such that the member's address will appear in a standard window envelope, and the return address of your group is displayed on the report. (If you haven't set your group's return address, see Organization Preferences.)

If you have marked entries for receipt printing by selecting the "Mark for Printing" option for the "Print Receipt" field, you can use report criteria similar to:

```
Print Receipt = ON
```

to retrieve all of the marked records

Dues Schedule

This report provides a year-at-a-glance style reference of the "annual dues" settings for your status codes. For each month of the year, the applicable dues amounts for each status is provided. See Statuses for more information about entering the annual dues amount.

Group Assignments

This report shows group assignments by member.

Liability Waiver

This report provides a basic liability waiver that includes member names and a signature line. The waiver text can be modified On the Report Settings window to make it more specific to your organization.

Note: Myrro International does not intend the Liability Waiver report to be a substitute for proper legal contracts or documentation, nor does Myrro International intend to imply that the Liability Waiver report is usable or enforceable as a legal document. Consult a lawyer to discuss the legal implications of using this report.

Mailing Labels (Members)

This report provides a basic address label.

Report settings enable you to set the starting label and change the sort from the default name order, to postal code order.

Note: This report includes a small amount of "extra information" that can be displayed in the upper right corner of the label. The information displayed in this space is defined in the Extra Label Info report preference.

Membership by Age

This report provides counts of membership by age.

Membership by Country

This report provides counts of membership by country.

Membership by Postal Code

This report provides counts of membership by postal code..

Membership by Reference

This report provides counts of membership by reference.

Membership Card

This report uses standard Avery business card paper stock (10 cards/sheet, 2" x 3.5" cards), such as the Avery® 8371 Business Card paper. Each card will include the Name, ID, and End Date, and either a logo graphic you define (for Membership Cards), or the photo graphic (for Photo ID Cards).

The report uses the Default Logo report preference. The logo should be an image file 144 pixels square. You can use any graphics editing program to create this file and save it to the program directory. The easiest way is to create a new graphic 144x144 pixels in size with a white background. Add a logo to that graphic, and leave any unused area as white color. That way, the blank space will be invisible on the finished card.

For example, these three "logos" are all placed in a graphic that is square, despite the actual shape of the logo.

Membership Data Export

This report is designed to retrieve all "importable" data on a membership record. Only a small portion of the data is actually displayed though, because the report is only intended to be used for exporting data.

The report essentially pulls all data from the General and Status (if displayed) tabpages of the membership record.

Note: Custom data cannot be automatically displayed in a pre-defined system report like this, because you have full control over what fields you create. i.e., we pre-define a report to show fields when we do not know what those fields will be. To export custom fields, create a new user-defined report or view containing the fields you want, and then use File > Save As to save that data to a file.

Membership History

This report analyzes the membership status change data to display the count of members that held each selected status by month for a specific year.

Note: A special report settings window is used for this report, to specify the year and the statuses to include.

Membership Statistics

This report shows one or more graphs of membership data. Each graph can be turned on or off on the Settings window of the report. Counts/Totals are available by Status, Gender, Age, Dues, and Donations.

Membership Status

This report displays the Name, ID, Status, Start and End Date of all members.

Name & ID List

This report is a simple listing of member names and IDs. This report is good for times when you need to provide a list of names to check off for some purpose, but don't want to display any personal or contact information about the people on the list.

This report has a unique sort feature. If you choose to sort the report by name, the first column of the report will show the name, and the second column will show the member

ID. Conversely, if you choose to sort the report by Member ID, the columns are reversed. The column being sorted will always be on the left.

Note: Be sure the Require Numeric ID preference is set correctly. This preference affects the sorting style of the IDs on this report the same way it affects the sorting of the Membership List.

Phone List

This is a basic listing of a member's name and home, work, and other phone number(s), as available.

Note: If you are using MemberTies Professional, the home phone number will come from the address record that is Active.

Photo ID Card (Family)

This report uses the photo assigned to the friend/family record. If there is no photo assigned, the record will not be found by the report.

If photos are stored in the database (controlled by a database preference), each photo will be recreated as a physical file in a temporary directory for display on the report. For this reason, a large report may take a few seconds to display while the photos are being created.

Photo ID Card (Member)

This report uses the photo assigned to the member record. If there is no photo assigned, the record will not be found by the report.

If photos are stored in the database (controlled by a database preference), each photo will be recreated as a physical file in a temporary directory for display on the report. For this reason, a large report may take a few seconds to display while the photos are being created.

Post Card

This report displays the organization return address in the upper left corner, and the member address in the address area of the selected card.

Report settings enable you to set the starting label and change the sort from the default name order, to postal code order.

Retention

This report provides a look at your membership renewal history. For a given date range, the report groups membership records by year joined, followed by membership status. For each person displayed, the name, start date, end date, sex, and birth date are provided.

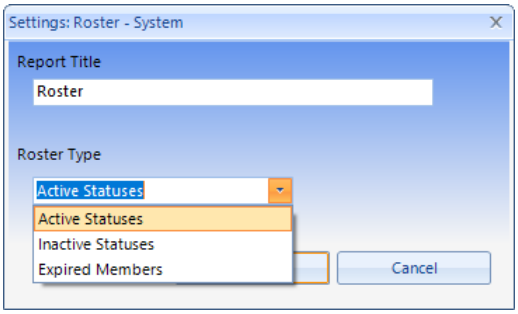
Roster

This report prints a three-column list of membership record name, address, and contact information.

Roster - System

This report is similar to the standard Roster, but can be generated either for members with Active, Inactive, or expired members.

Note: A special report settings window is used for this report, to specify the type of predefined roster.



Sent Mail by Recipient

This report lists the Subject, Date/Time, and Priority of all email they have been sent, grouped by receiving member name the recipient.

Note that MemberTies has no way of knowing if email has been received or even processed after it has been handed off to your mail server. So this report is essentially showing what your mail server was given to process.

Status Change History

Each time the status of a membership record is changed, either manually or automatically by the system, an entry is recorded in the membership record's status history. This history log can be printed using this report.

Summary - Individual

This report provides a full summary of each membership record. This report is best run for a subset of your membership, rather than all members because it returns a significant amount of data per member.

To Do List

This report lists To Do items, grouped by member. Settings control whether the report includes open, closed, and future items.

19.9.2 Group Reports

Assigned Items (Group)

This report lists all items, and for each item, shows the groups that have been assigned the item.

On each report, the number in parenthesis next to the category, item or group name indicates the total number of items assigned beneath it. The categories and items displayed on this report is sorted according to the Ranking set up for each. See Categories & Items for details.

Assigned Items by Group

This report lists all Groups, and for each group, shows the items that have been assigned.

On each report, the number in parenthesis next to the category, item or group name indicates the total number of items assigned beneath it. The categories and items displayed on this report is sorted according to the Ranking set up for each. See Categories & Items for details.

Group Account Statement

This report is designed to be sent to your group contacts. It is formatted such that the group address will appear in a standard window envelope, and the return address of your organization is displayed on the report. (If you haven't set your organization's return address, see Organization Preferences.)

The upper portion of this report includes the current account balance. The lower portion of the report is their statement of account, showing account history.

When this report is selected, an additional Options tab is available on the Report Settings window, with the following settings:

- Statement Text - Optional texts to display above or below the statement.
- Include Remittance Advice - Select this option to display a "tear off" remittance form for the recipient to use to return a payment.
- Return Address - The return address to display on the Remittance Advice. This enables you to provide a different location for collection of payments rather than the default return address specified in report Preferences.
- Include Balance Forward - Select this option to sum all postings prior to a specified date and print it on the report separately from the postings following that date. This setting is designed to avoid displaying the entire posting history of a member. For example, you could sum everything prior to the end of the previous year, and display only entries for this year.

  After selecting the Include Balance Forward option, the following fields must also be set:

- Date: The Date Recognized to use for the balance forward calculation. All postings ON or BEFORE the date will be summed and displayed with your Label. Postings shown on the rest of the report will be limited to those with a Date Recognized AFTER the date. (Other criteria can still be used, but the Date Recognized > YourDate will be added automatically behind the scenes.

- Label: The text to display to the left of the balance. If you choose a date of 12/31/2012, you might want text like "Balance forward as of 1 January:" but the choice is yours.

Group Dues Receipt

The receipt report can be generated for one or more posting records. It is formatted such that the group address will appear in a standard window envelope, and the return address of your group is displayed on the report. (If you haven't set your group's return address, see Organization Preferences.)

If you have marked entries for receipt printing by selecting the "Mark for Printing" option for the "Print Receipt" field, you can use report criteria similar to:

```
Print Receipt = ON
```

to retrieve all of the marked records

Group List

This report is a simple line-item listing of basic group data, including Group Name and contact information.

Group Membership List

This report is grouped by Group Name, and lists the name and member ID of all members assigned to each group. If no selection criteria is used, the report will automatically display all members for all groups.

Note: When using report criteria with this report, any address criteria apply to the Group record, not the members. i.e., if you use criteria like, "City = My Town", it means the city on the Group record should be "My Town". Associated membership records are not examined for address criteria.

Mailing Labels

This report provides a basic address label.

Report settings enable you to set the starting label and change the sort from the default name order, to postal code order.

Roster

This report prints a three-column list of group name, address, and contact information.

Sent Mail by Recipient

This report lists the Subject, Date/Time, and Priority of all email they have been sent, grouped by recipient.

Note that MemberTies has no way of knowing if email has been received or even processed after it has been handed off to your mail server. So this report is essentially showing what your mail server was given to process.

Summary

This report provides a full summary of each group record.

To Do List

This report lists To Do items, grouped by group. Settings control whether the report includes open, closed, and future items.

19.9.3 Activity Report

Activity Attendance

This report lists all attendees by activity, with any guest names shown below the attendee.

Activity Attendance by Day

This report groups attendance by month, and then generates a graph by day of each month

Activity Attendance by Hour

This report generates a graph of attendance by hour of day

Activity Balance by Type

This report generates a graph of activity debit and credit balances by activity type.

Activity Balances

This report lists the current balance for each activity.

Activity by Attendee

This report is groups attendance information by activity name. For each activity, attendees are listed in alphabetical order, including their attendance dates, role, and status.

Activity by Group

This report displays activity attendance for all groups. This report will list ALL groups, and all group members who have attended an activity. If no members have attended any activities, the report will indicate zero attendance.

Activity by Sponsor

This report is designed to display the activities with which a given member has been associated when they have been associated to a specific sponsor. The report groups data by sponsoring member first, then by activity, then by attending member. It then displays general attendance information about each attending member, including start/end date, total hours, role, status, and any guest names.

Activity Check-In Not Found

This report displays the contents of the Unattended Mode "Not Found" log.

Activity Detail

This report displays complete information about an activity. Everything that appears on the Activity window is included, as well as additional details for the selected location.

Activity Hours by Attendee

This report is designed to display the activities with which a given member or friend/family member has been associated. The report groups data by attendee, and displays the activity start/end dates, the hours:minutes in attendance (based on the start/end date/time) and the role and attendance status.

Activity List

This report provides a brief line by line listing of each occurrence of an activity, including its start/end dates and location.

Activity Postings by Attendee

This report lists activity postings per attendee, grouped by activity.

Activity Receipt

The receipt report can be generated for one or more posting records. It is formatted such that the attendee address will appear in a standard window envelope, and the return address of your group is displayed on the report. (If you haven't set your group's return address, see Organization Preferences.)

If you have marked entries for receipt printing by selecting the "Mark for Printing" option for the "Print Receipt" field, you can use report criteria similar to:

```
Print Receipt = ON
```

to retrieve all of the marked records

Activity Sponsor Counts

This report provides a brief listing by sponsor of all members they have sponsored, the activity it was for, and the date. Totals are provided by sponsor.

Note: The Date displays the attendance start date, or the activity start date if there was no date on the attendance entry itself.

Activity Statistics by Gender

This report generates various graphs by Gender. Graphs are available by Age, Guest Count, and Income/Expenses.

Activity Summary

This report is an extension of the Activity List report. In addition to dates and locations, this report displays the total income, total expenses, balance, and attendance.

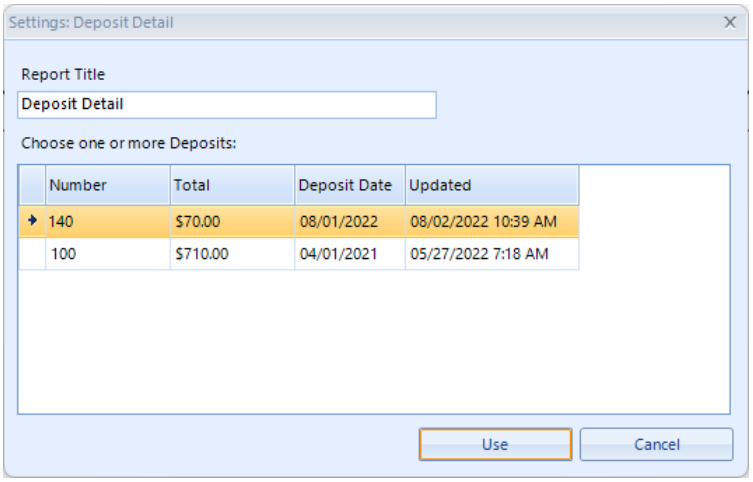
Activity Type by Attendee

This report lists activity attendance information for each attendee, grouped by type of activity.

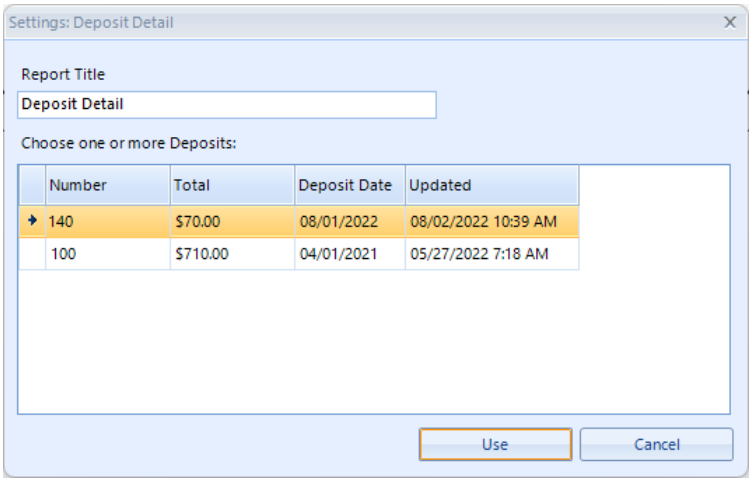
19.9.4 Misc Reports

Deposit Detail

This report prints the details of one or more Deposits.



Note: A special report settings window is used for this report, that enables you to specify one or more deposits to include on the report.



Postings - Totals by Year

This is an all-inclusive report that combines all posting data together in one report. The report lists total amounts for each posting type, per year.

Postings - Totals by Yr/Month

This report groups information by date, by month. Within each date, the name, member ID, cheque, comments, and amount are provided.

Postings - Type Grid

This is cross-tab style report that displays the date and member name, and then a column for each posting type on the report. Each row is totalled to the right, and each column is totaled at the bottom, creating a "grid" of posting type total data.

Due to space limitations on the report, it may not be possible to display all posting types in your system.

Postings by Date

This report groups information by date, and within each date provides name, member ID, cheque, comments, and amount information.

Postings by Month

This report groups information by date, by month. Within each date, the name, member ID, cheque, comments, and amount are provided.

Postings by Payment Method

This report groups information by payment method, and within each method provides the date, name, cheque, posting type, comments, and amount information.

Postings by Source

This report groups information by posting source, i.e., the member or activity or activity attendee the posting is tied to. Within each source, the date, cheque, posting type, amount, and comments are provided.

Postings by Type

This report groups information by posting type. Within each type, the date, name, member ID, cheque, comments, and amount are provided.

Postings List

This report provides a simple line-by-line detail of postings, with an overall total at the end. It sorts by date in descending order by default.

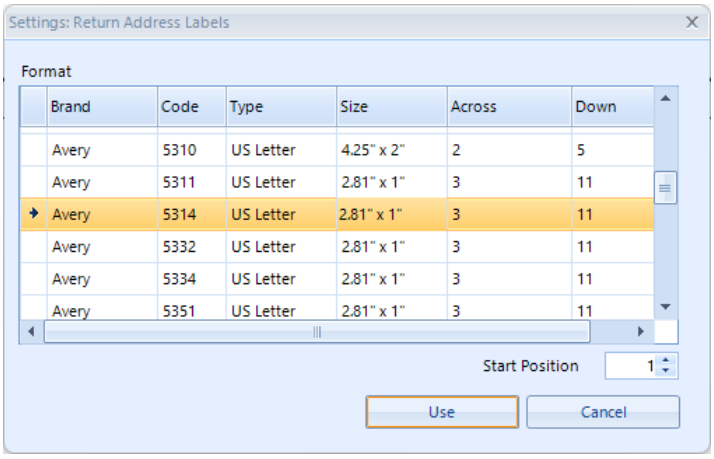
Receipt Listing

This report displays all postings for which a Receipt Number (and optional Receipt Book Number) was assigned.

Return Address Labels

This report provides a set of return address labels, using the organization name and return address specified in Organization Preferences.

Note: A special report settings window is used for this report, because it only needs to know the label format to use.



Status Codes

This report generates details for all statuses, and all applicable settings for each code

Stored Comments

This report prints a list of all stored comment texts currently defined in the system.

To Do List (My Own)

This report provides a To Do List based on your specifications for To Do items assigned to yourself. You can restrict it the same way you can restrict the display of the To Do List itself.

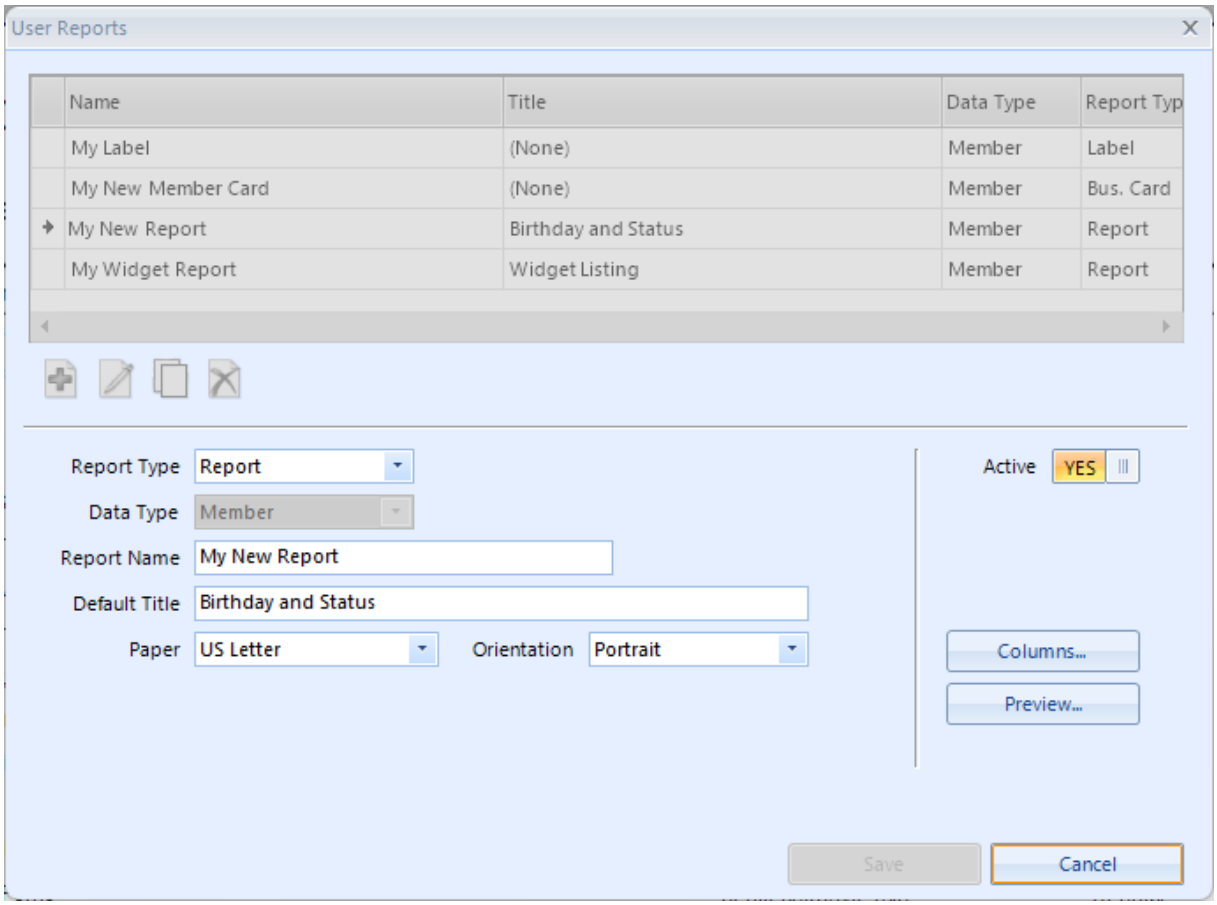
Users

This report provides information about all users in the system.

19.10 User-Defined Reports

19.10.1 Overview

With MemberTies Professional you also have the ability to define your own reports, including standard columnar reports; business, logo, and photo cards; post cards; mailing labels; and rosters.



This example shows a 2-column roster being created. There are several types available:

- Reports (standard reports) are reports similar to the Contact List -- several fields, with or without headings, displayed as columns of data where each "row" normally represents one record.
- Business Cards are a set of fields arranged into one or more rows to fit on a standard business card.
- Logo Cards are similar to Business Cards, except the left half of the card is used for a user-defined logo.
- Photo Cards are also similar to Business cards, except the left half of the card is used for the member's photo. If a member does not have a photo assigned, the record cannot appear on the report.
- Mailing Labels are typically used for addresses on envelopes because the formats are all adhesive backed, but of course could be used for anything.
- Post Cards show the selected fields on the right-hand side of the card, reserving the left for the optional return address.
- Roster Reports are sometimes called "directory" reports. They are a kind of combined columnar and label report. Each record is displayed as multiple rows of data within a 2, 3, or 4 column layout. A roster can also include an optional "alpha" heading (i.e., "A" begins the records starting with "A"). Note: The first field is used for the Alpha character, so if the first visible field isn't what you want to use, add the needed field as a hidden first field.

Note: If you need a card or label format that isn't available, contact support and let us know. Ideally, provide the necessary dimensions (page size, label width & height, vertical gap, horizontal gap, number across and down) and we will see if it can be added to the system.

Similar to Views, you are able to choose the fields you want to display. You have the ability to place them in any order, set the sort order (i.e., by City, then by Last Name), change or hide the text displayed for the column headings (for reports that have columns), and modify various other settings.

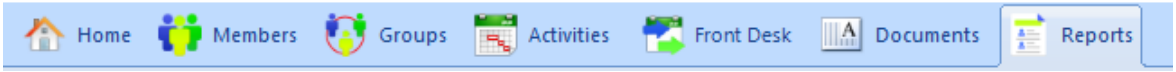
The reports, labels, and cards you define are referred to as "User Reports" and appear on the Choose Report window just like any other report. When you choose one for display, the report Settings window will open just like a normal report, enabling you to specify search criteria, update the title, run the report, print, etc..

19.10.2 Working with User Defined Reports

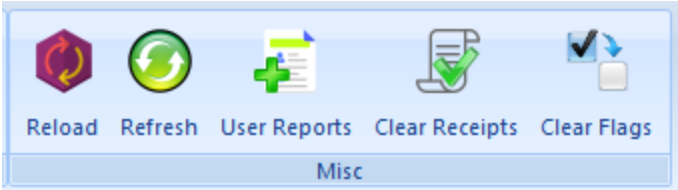
User defined reports are easier to create than cards and labels, because all fields appear on the same line (with the exception of Roster reports, which are formatted like labels). However, you have some additional options with reports, because each field has a "header" at the top of the column that normally contains the field name.

Working with User Reports

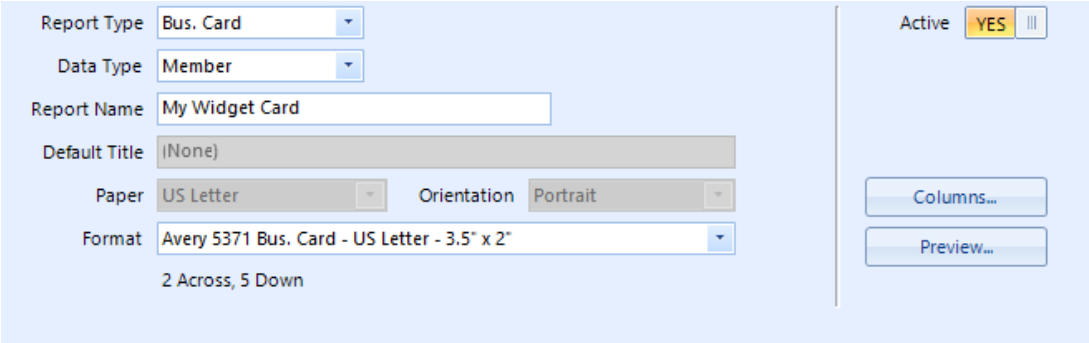
1. Choose the Reports tab from the ribbon bar.



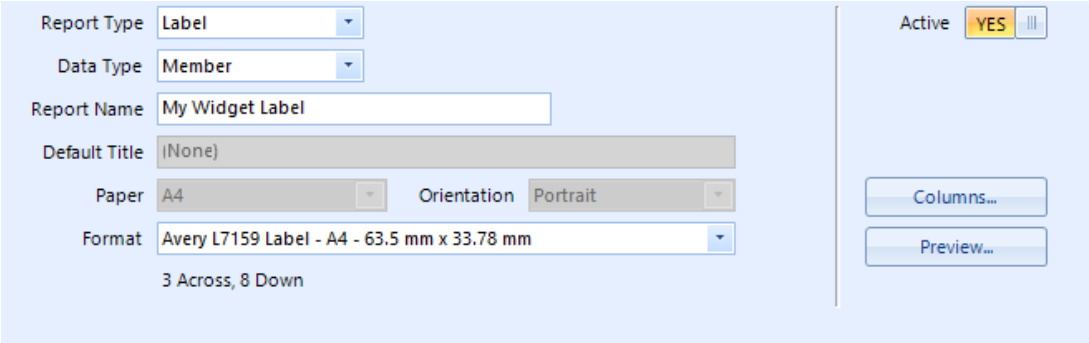
2. If the Choose Report window opens automatically, click Cancel to close it..
3. Click User Reports in the Misc section of the ribbon.



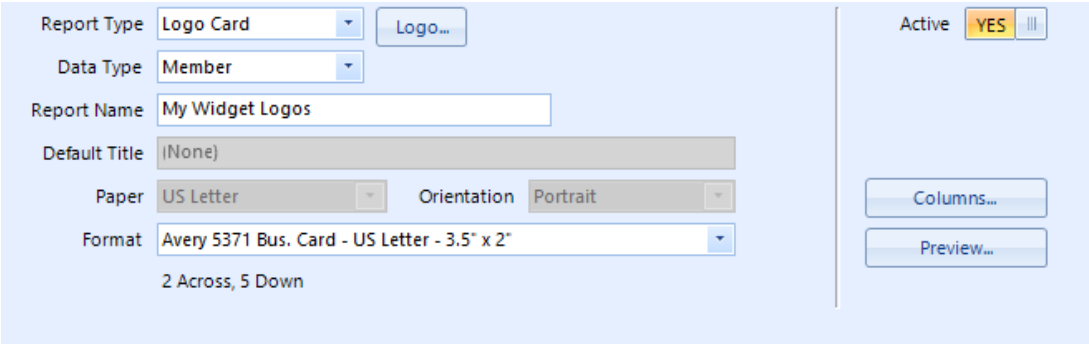
4. The User Reports window will open, listing all currently defined user reports, and their active status (inactive reports exist, but cannot be selected to run on the Reports window).
5. To add a new report, click Add, or, select an existing report and choose Edit, Copy, or Delete.
6. The following fields are available:
   - Report Type - the type of report. The examples below show how the available fields change based on report type.



Business Card Options



Label Options



Logo Card Options

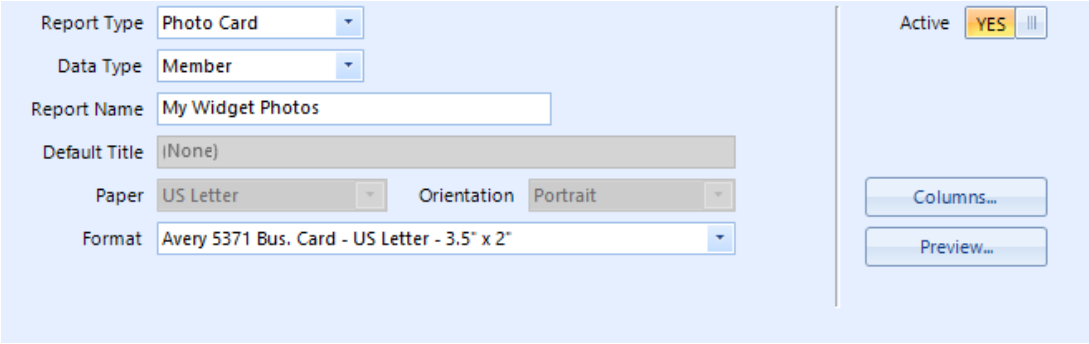
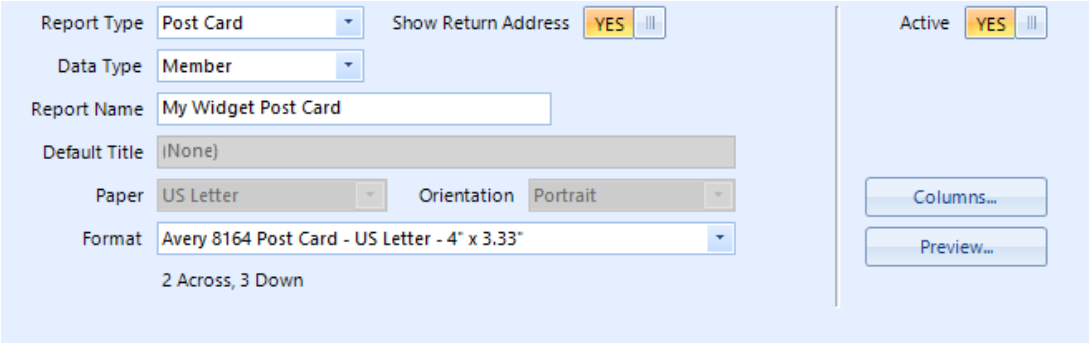
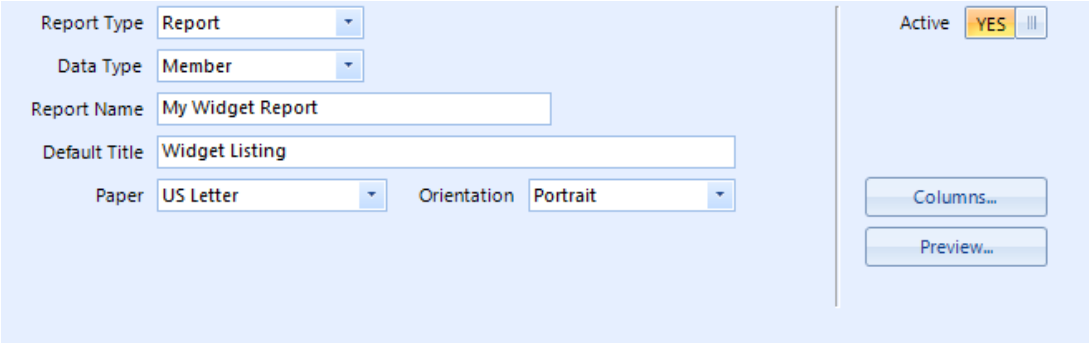


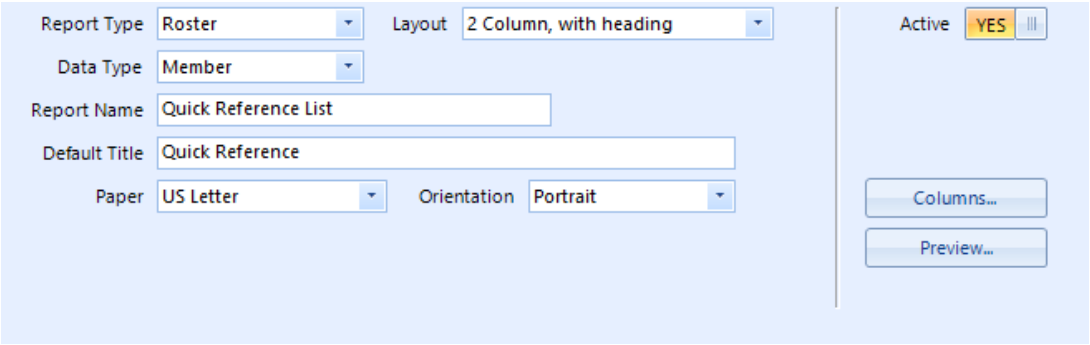
Photo Card Options



Post Card Options



Report Options



Roster Options

- Logo - specifies the logo to display on the left side of the card. This button is only visible for Logo Card reports. By default, the report will use the Report Logo set in preferences if you leave it blank or the specified file cannot be found. The logo image file is square, and will display best if it is roughly 144x144 pixels square. Note: If your logo is not square, create a 144x144 pixel square graphic with a white background, and place your logo in the middle of it, leaving the extra white space untouched.

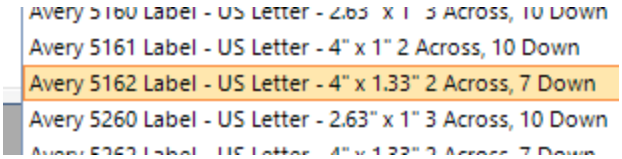
- Data Type - focuses the report on member, group, or activity data. This can have a significant effect on how quickly the report can run. i.e., if you choose Activity, but only use Member fields, the report has to do everything by starting with an Activity, finding all of its Attendees, getting member data for those attendees, and then rendering the report and applying search criteria. Furthermore, the report might have to show the same member once for every activity they have attended, because as far as the report knows, the *activity* is changing even if the member is not.

  Starting with a data type of Member would mean direct access to the fields you want and less chance of duplicate data appearing.

- Report Name - the name of the report as it should appear on the Choose Report window.

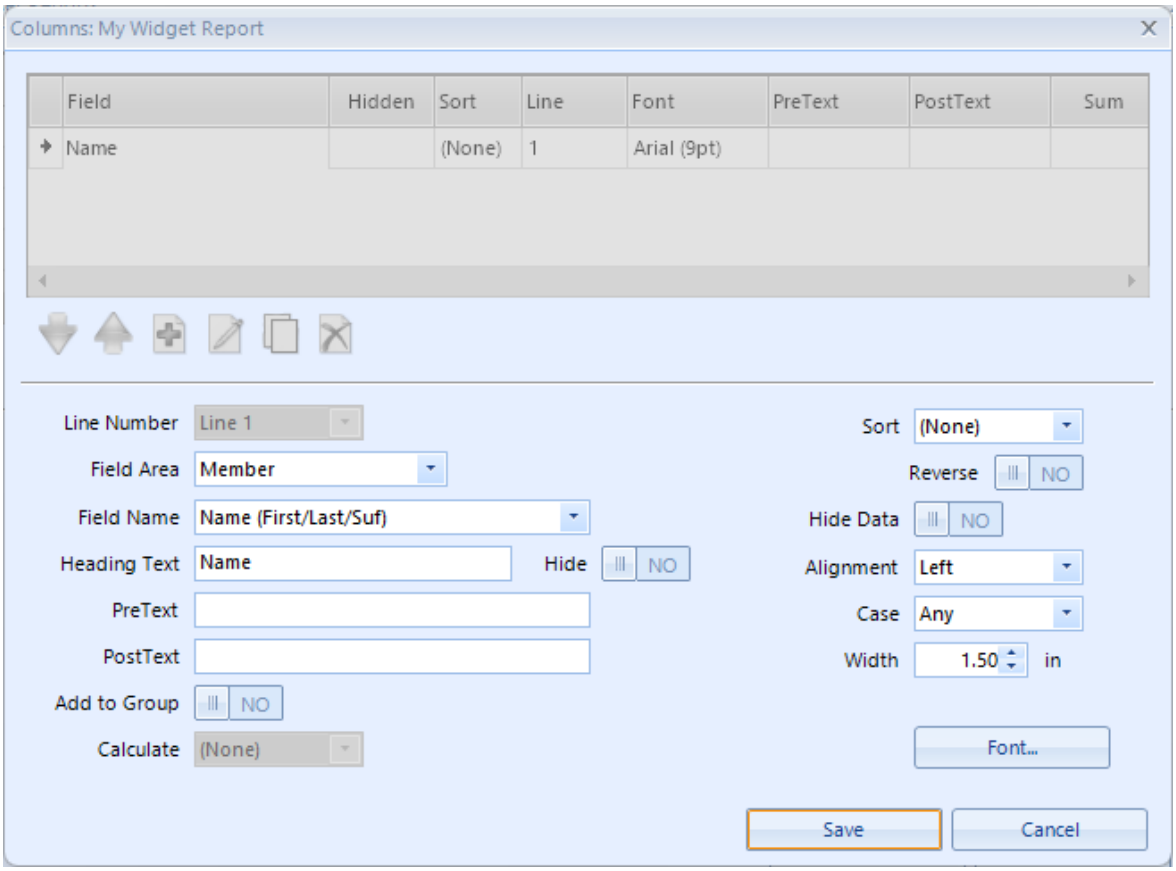
- Default Title - the title that appears at the top of a standard report or roster report. This field is not used for labels and cards because there is no header area. Note that the title can be changed on the report Settings window when running the report, just like system reports.

- Paper - the paper size. This field is set automatically when choosing the Format on all label/card reports.
- Orientation - sets portrait or landscape orientation. This field is set automatically when choosing the Format on all label/card reports.
- Format - the predefined card or label format to use. The list includes the Brand, Brand ID, Type, Paper Size, Dimensions, and count across/down the page.



- Show Return Address - controls whether the return address defined in preferences is displayed on the left side of the card. This button is only visible for post cards.
- Layout - lists the column/heading options for a roster report. This option is only available for rosters.
- Active - controls whether this report is available for selection and display/printing via the Reports window.

7. Once the basics for the report are set, click Columns.



8. The following fields are available:

- Line Number - for multi-line reports like labels, cards, and rosters, this controls the line on which the field will appear. For a standard Report as shown above, this is disabled because everything is on line 1.
- Field Area - the general data area of the field. This selection controls what fields are available in the Field Name list.
- Field Name - the specific field to show. In our example we've selected a smart field that shows the name in First, Last order (plus suffix).
  Note: In the list of fields that are already defined, you can see we've also added the Last Name field by itself, and it is hidden. However it is also the 1st sort, so we're sorting the report by a column that is invisible, so the report can show the first/last name normally.
- Heading Text - the name as it should appear in the column heading.
- Hide - controls whether the heading text itself is hidden

- PreText - text to be displayed to the left of the data for the field (you can leave leading or trailing spaces in this field).

  Tip: You can force a blank line to appear above a particular line by entering "<br>" (without the quotes) in the pre-text field. (This will not work for Views.)

  Technical Note: The "<br>" is not actually HTML code, we just use that for simplicity.

- PostText - text to be displayed to the right of the data for this field (you can leave leading or trailing spaces in this field).

  Note: Pre and Post-Text values are intended to be used however you choose. One possibility is to use Pre-Text in place of the column heading. In other words, if the column's "Hide Heading" option is turned on, no heading will appear. But you could use Pre-Text to show "Tel:" in front of each phone number (i.e., displaying as, "Tel: 123-456-7890")

- Add to Group - controls whether this field will be part of a group heading, meaning all records with matching "group" fields will be listed together on the report.

- Calculate - if a numeric field is selected, this provides options to display a sum, total, or average of that field at the bottom of the report or group.

- Sort - if the view should be sorted by the contents of the field, choose the sort here. You can specify up to 5 levels of sort, i.e., to sort by Name and then by Postal Code, you would set the name as the 1st sort, and the Postal Code as the 2nd sort. A field does not have to be visible to be sortable.

- Hide Data - controls wither the entire field is hidden, such as in the example above with the Last Name field that is being used only for sorting.

- Alignment - enables you to force the contents to be left, center, or right-aligned within the column The default is Left aligned.

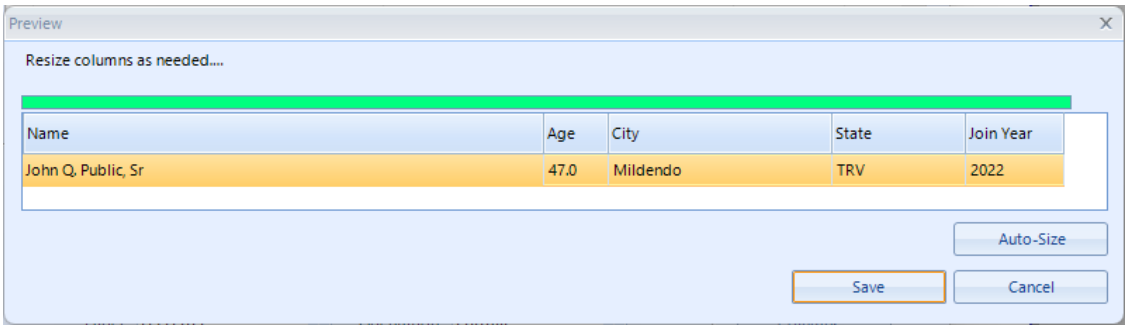
- Case - enables you to force text field contents to be upper or lowercase. The default is "Any", meaning, leave it as-entered.

- Width - the width of the column in measurement unit of the report (inches/mm). This value is set to a default based on the selected Field, and is normally modified by resizing columns in the Preview window. But the field is displayed here for convenience, if you know that you like 100 as a width for certain types of data and want to set it manually. It also allows for small adjustments when necessary.

- Font - allows adjustments to font settings for data in this field

9. Create and save all columns as needed, then click Close to return to the previous window.

10. Click Preview.



11. The preview window enables you to visually adjust column widths to best fit your data. You can resize any column by dragging the border between heading cells.

    Note: preview data is *fake data*. It does not pull data from the database. Columns are populated with representative data of average length. You will know your data best and can resize the columns as appropriate. The Auto-Size button will resize each column proportionately to try to fill the entire width.

12. When finished, click Save to return to the previous window.

13. Click Save to save the finished report. Close and re-open the Reports window and the new report should appear in the list of reports to open.

19.10.3 Exporting/Importing a Report

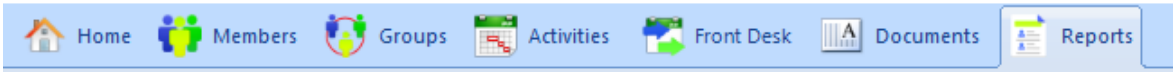
Occasionally a report definition needs to be copied to a different database. Perhaps you have a test database where you've created a report just the way you like it, and need to move that report definition to your production database. Or maybe a report isn't working correctly and you want to send it to the support team to review.

Right-click options on the user reports list enable you to export any report definition to a file, or import a previously exported definition.

Note: If the report contains custom fields, they will have internal IDs that are unique to the database they were created in. Importing a report with custom fields to a different database (i.e., a completely different database, not just a restored copy) may cause those fields to be omitted because they don't exist. In that case, the rest of the report would still be imported.

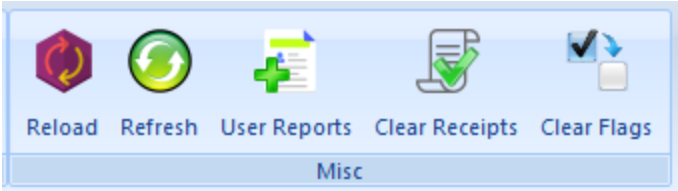
Exporting or Importing User Reports

1. Choose the Reports tab from the ribbon bar.



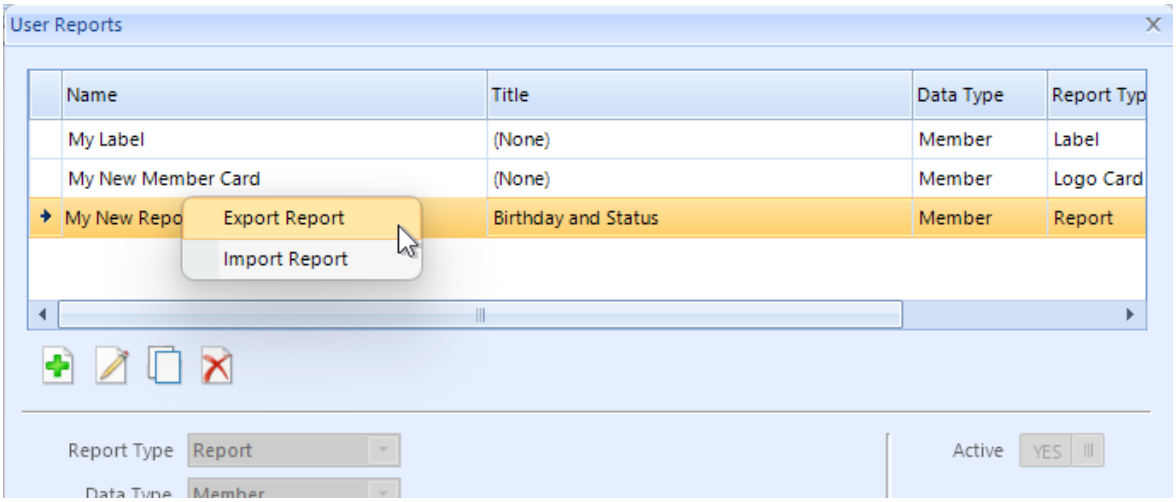
2. If the Choose Report window opens automatically, click Cancel to close it..

3. Click User Reports in the Misc section of the ribbon.



4. The User Reports will open, listing all currently defined user reports

5. To export a report, right-click the desired report and choose Export Report. To import a report, right-click anywhere in the list and choose Import Report.



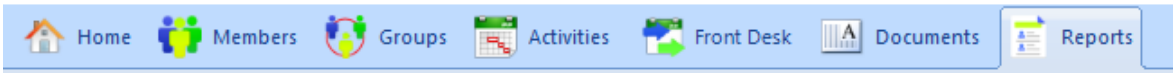
6. Follow any prompts to complete the export or import process.

19.10.4 Example - Creating a User Report

This example demonstrates how to create a simple user-report to show name and address information.

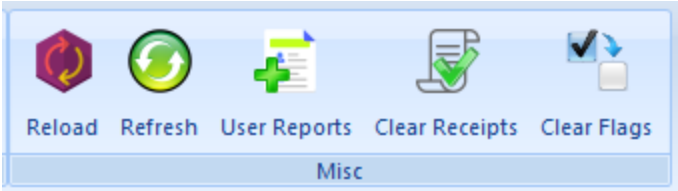
Creating a Report

1. Choose the Reports tab from the ribbon bar.

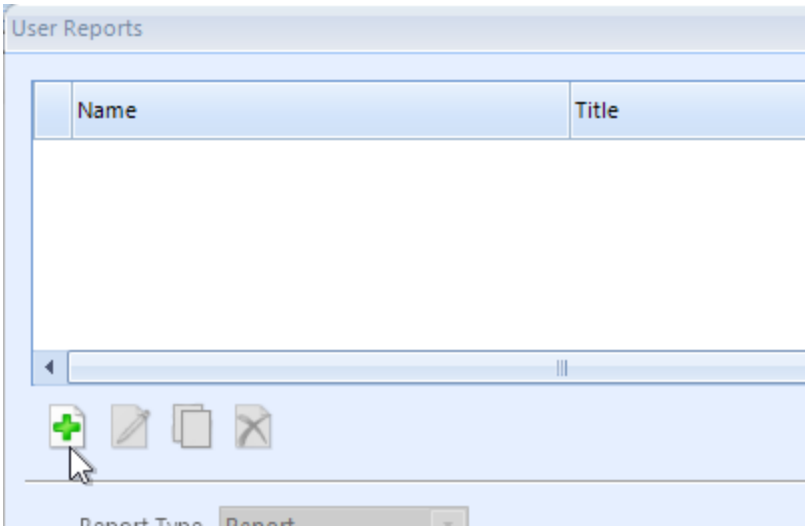


2. If the Choose Report window opens automatically, click Cancel to close it.

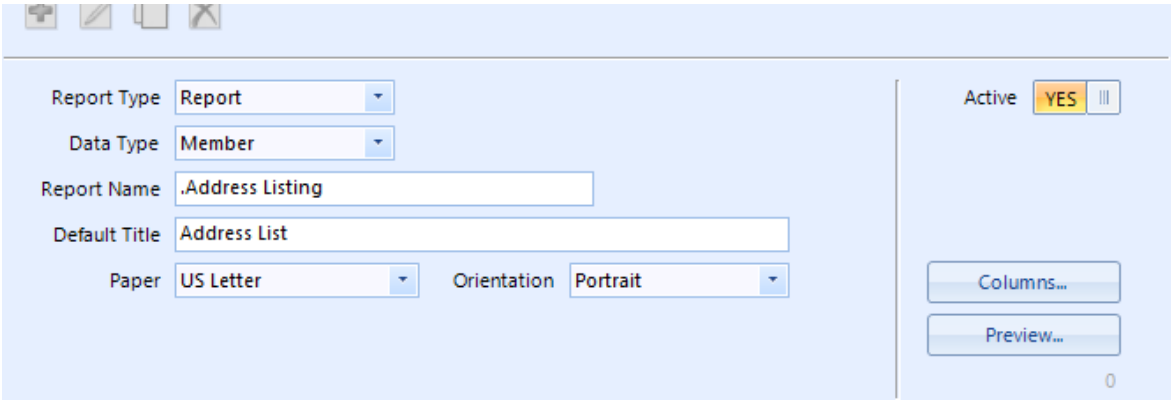
3. Click User Reports in the Misc section of the ribbon.



4. On the User Reports window, click Add.



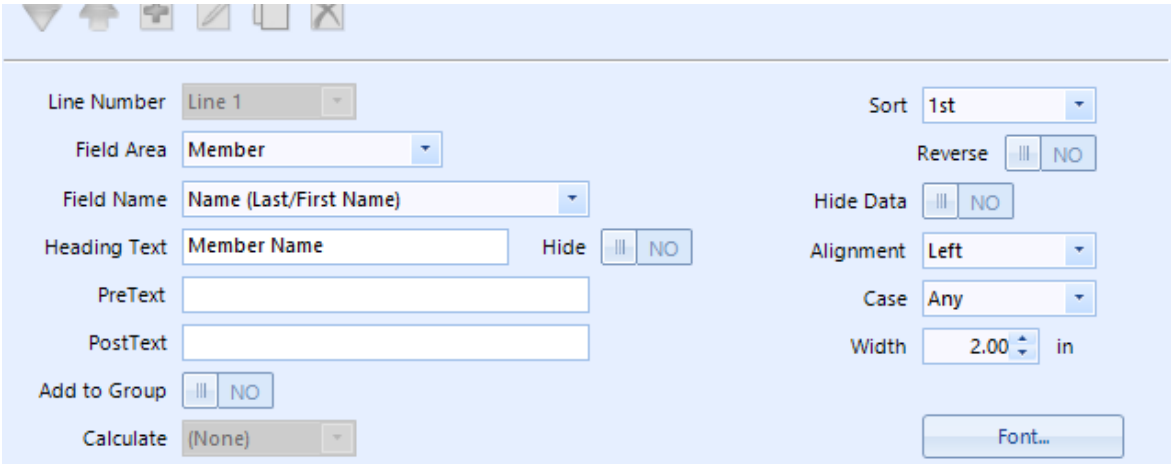
5. Give the report a name and default title as shown:



Note: We like to start user-report names with a period, so they all sort to the top of the list. So we called it ".Address Listing".

6. Now we need to add columns to the report. Click the "Columns" button.

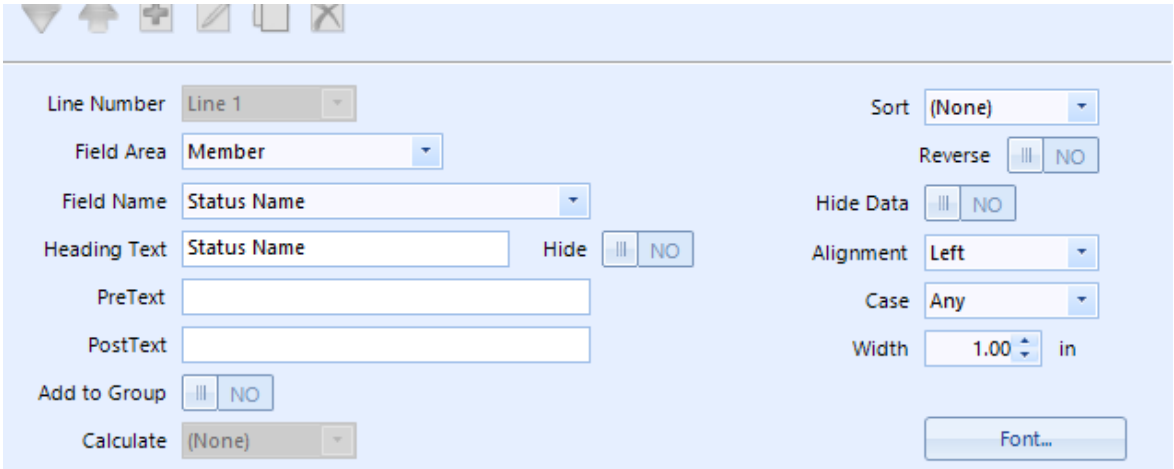
7. On the Columns window, click Add to add the first column and fill out fields as shown.



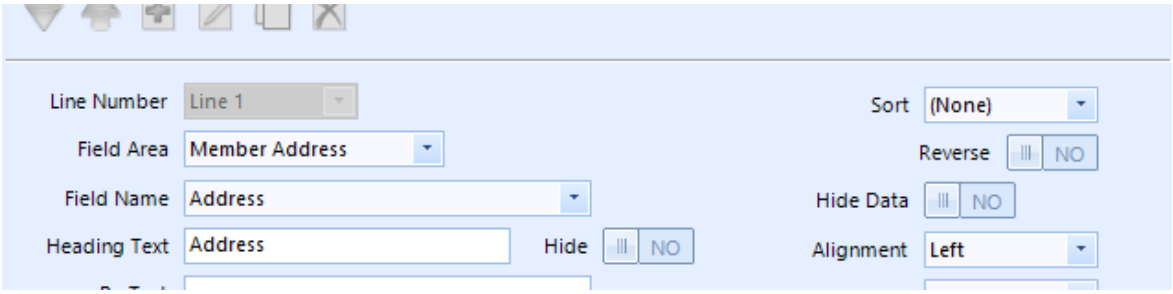
Notes: 1) We changed the "Heading Text" to simply, "Member Name" instead of keeping the default value, which is the full field name. 2) We set the Sort to "1st" so the report will sort by this column as the primary sort

8. Click Save.

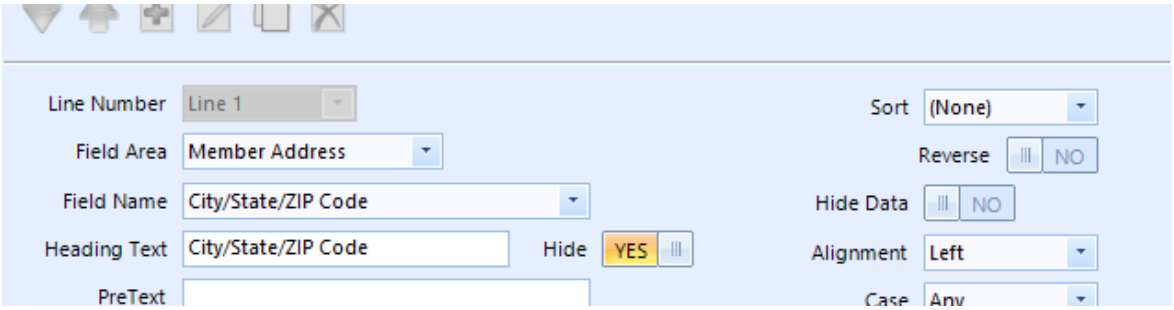
9. Click Add, and fill out fields for the Status as shown below, and Save.



10. Now we want to add the address. Click Add, and change the Field Area to "Member Address", and add the address as shown below. Then Save.

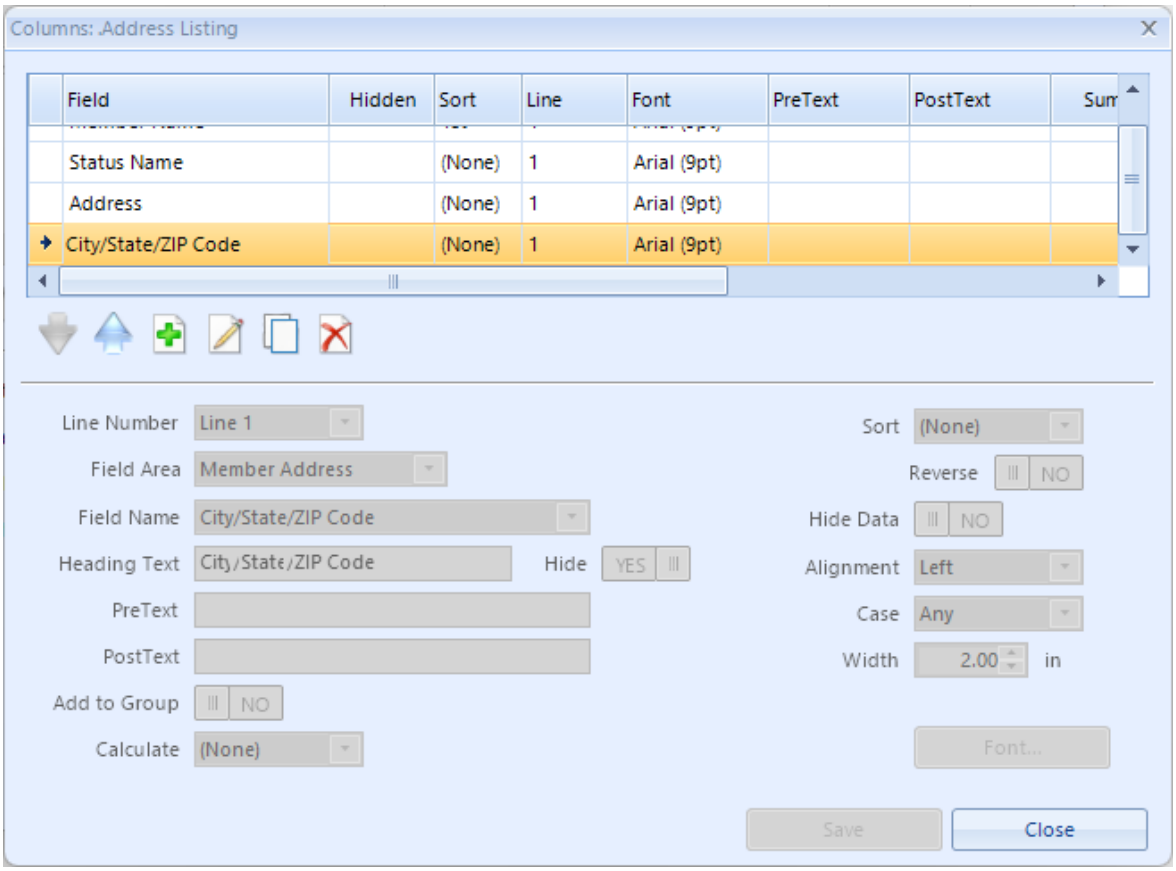


11. Click Add, and also in the Member Address area, choose the "City/State/ZIP Code" smart field. This field automatically combines these values into one field.



Note: Since we already have a column with the heading "Address", we don't really need to see a column heading for this one. To hide the column heading, use the "Hide" switch.

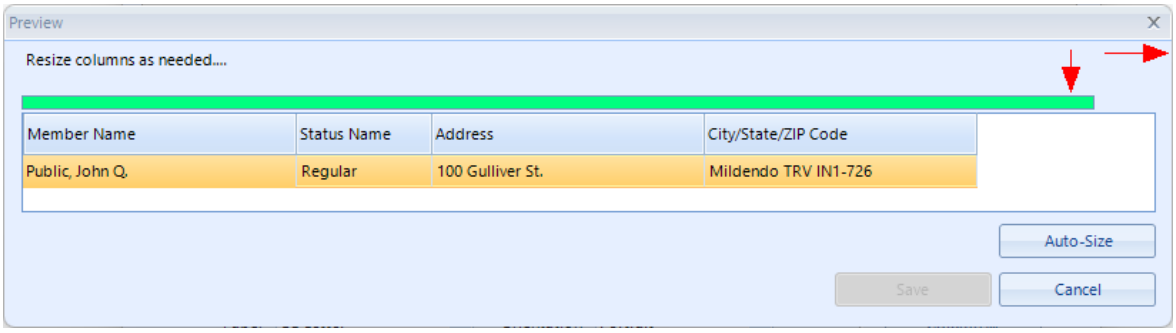
12. Save this, and the Columns window should now show several completed columns.



13. Click Close.

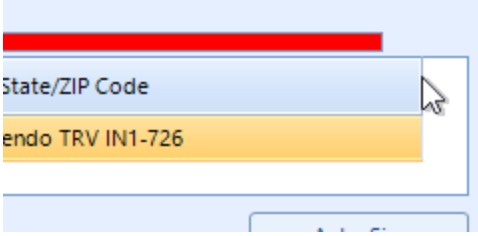
14. Back on the User Reports window, click Preview.

15.Increase the size of the Preview window so the entire bar across the top is visible.



16.Resize individual columns as desired. The sample data displayed may or may not accurately represent the type of data you have. You can also click "Auto-Size" and the system will attempt to proportionally size each column to fill the space.

If you size a column wide enough that the available space is exceeded, the bar will turn red.

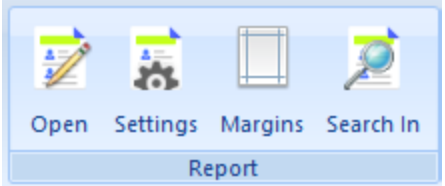


17.When you're finished, click Save.

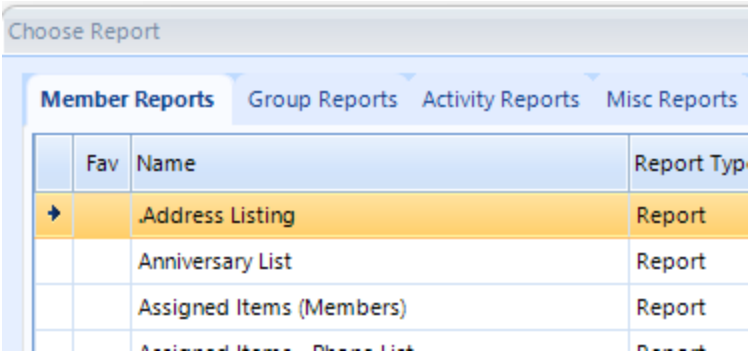
18.Back on the User Reports window, click Save to save the finished report.

19.Click Close to return to the main Reports window.

20.Click Open in the Report section of the Ribbon.



21.If you named your report with a leading period, it should appear at the top of the Member Reports list.

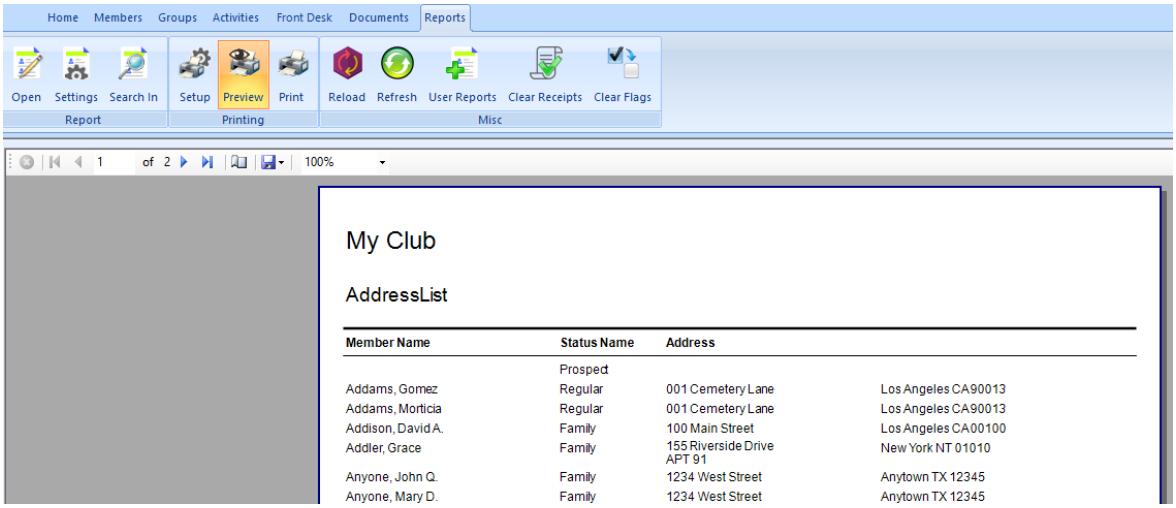


22. Select the report and click Use.

    Note: You can also click "Toggle Favorite," so your report displays in the My Favorites tab in the future.

23. When the Settings window opens, add any desired search criteria to limit the records that are shown on the report, or just click "Run Now."

24. The new user report displays just like system reports.



19.10.5 Example - Creating a Barcoded ID Card

There are two primary things to know about using barcodes:

- A barcode is just a True Type font like any other Windows font. You can pick any text in any report and set the font to your barcode font, and it will print as a barcode. Barcode fonts are not free. Most of the "free" barcode fonts you find are either poor designs that may not scan well, or are stolen. Do the right thing and license a font for your use. There are excellent, inexpensive font packages available at ID Automation. They deal exclusively with barcodes and barcode scanners, and we've recommended their products for a long time.

- When you scan a barcode, it simply dumps the contents of the code into whatever field your cursor is currently in. If the barcode contains the member ID, then the cursor should be sitting in a search field labeled, "Member ID".

Install the Font

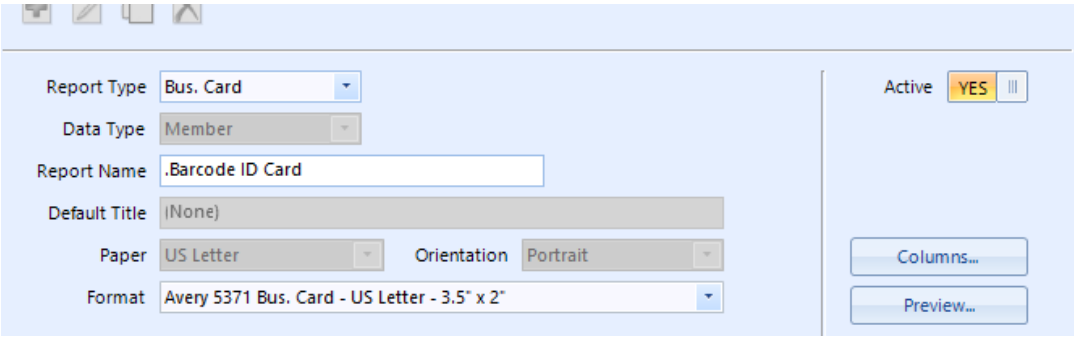
1. Buy a barcode font if you don't have one.

   We recommend the Code 39 (also known as "3 of 9") barcode font. A of this writing, one is available through ID Automation (https://www.idautomation.com) in a package that contains the font in various sizes, and with or without the text below the code that displays what the barcode means. This font is recommended for normal alphanumeric data that doesn't need a checksum.

2. Install the font(s) you want to use. This is as normally as simple as dropping the font into your c:\program files\windows\fonts directory, but follow any instructions that come with the font.

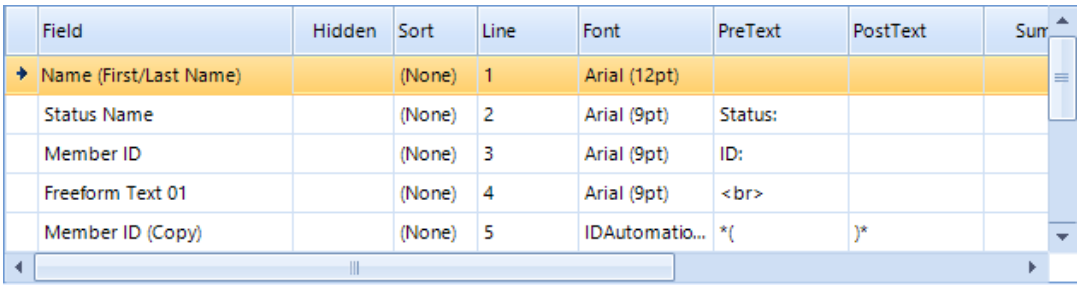
Create the Membership Card

1. Create a new user-report. See this example for an overview of creating a report from scratch.
   Note that the plain business card format or photo card is the most common.



Note: We use a dot at the start of the Report Name so our user-reports sort to the top of the list.

2. Add the fields you want to show on the card normally, and as the last field at the bottom, choose Member ID.



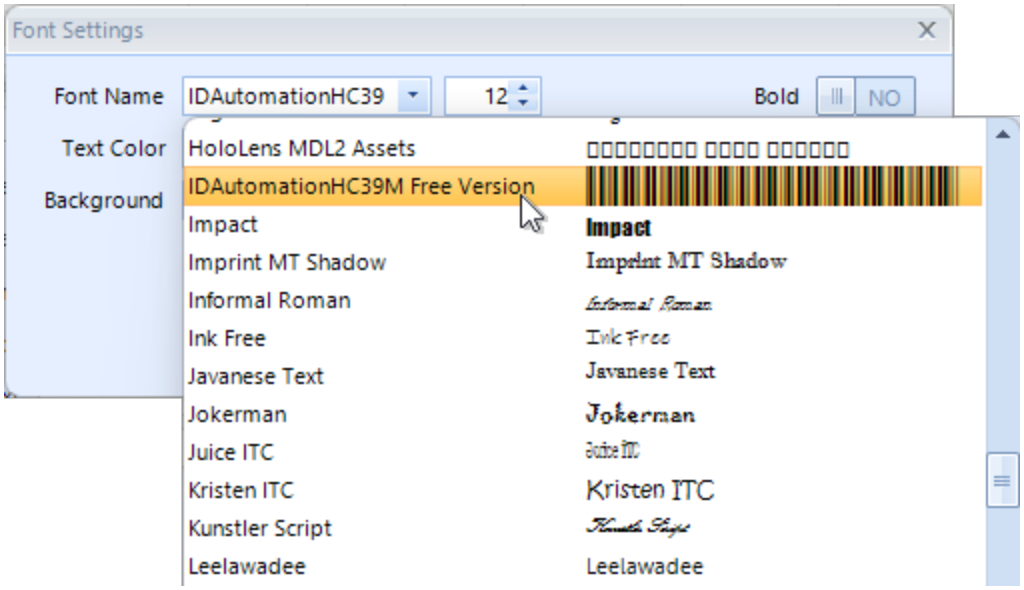
Field	Hidden	Sort	Line	Font	PreText	PostText	Sum
Name (First/Last Name)		(None)	1	Arial (12pt)			
Status Name		(None)	2	Arial (9pt)	Status:		
Member ID		(None)	3	Arial (9pt)	ID:		
Freeform Text 01		(None)	4	Arial (9pt)	 		
Member ID (Copy)		(None)	5	IDAutomatio...	*(	)*	

In our example, we used:

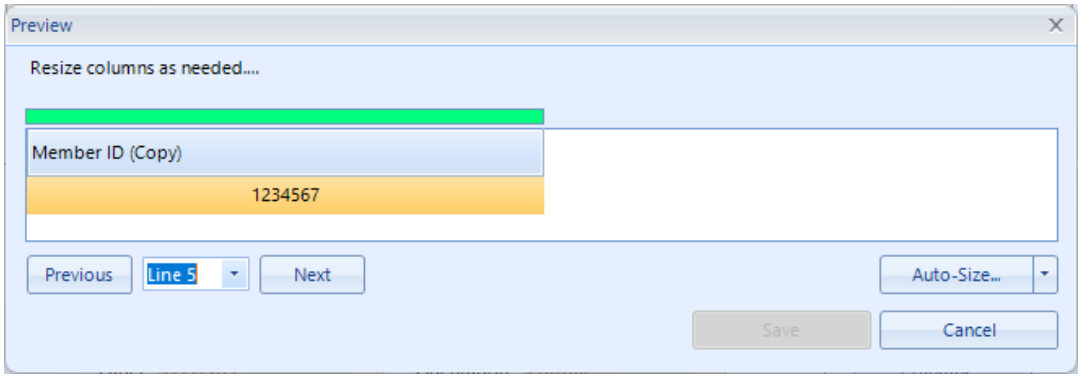
- A smart field to combine the first and last name
- The status, with a pretext label, "Status:"
- The Member ID, with a pretext label, "ID:"
- A freeform text field with the "<br>" pretext to cause a blank line
- A second copy of the Member ID, using our barcode font.

Note: the pre/posttext characters used for the barcode field are the Start and Stop characters recommended for the barcode font. Without these characters, the codes will print in varying widths and may not read correctly. Refer to the documentation for your font for the appropriate start and stop characters.

3. When adding the Member ID field, click Font and set the font to be your new barcode font, and the size to be 12 (for easier scanning).



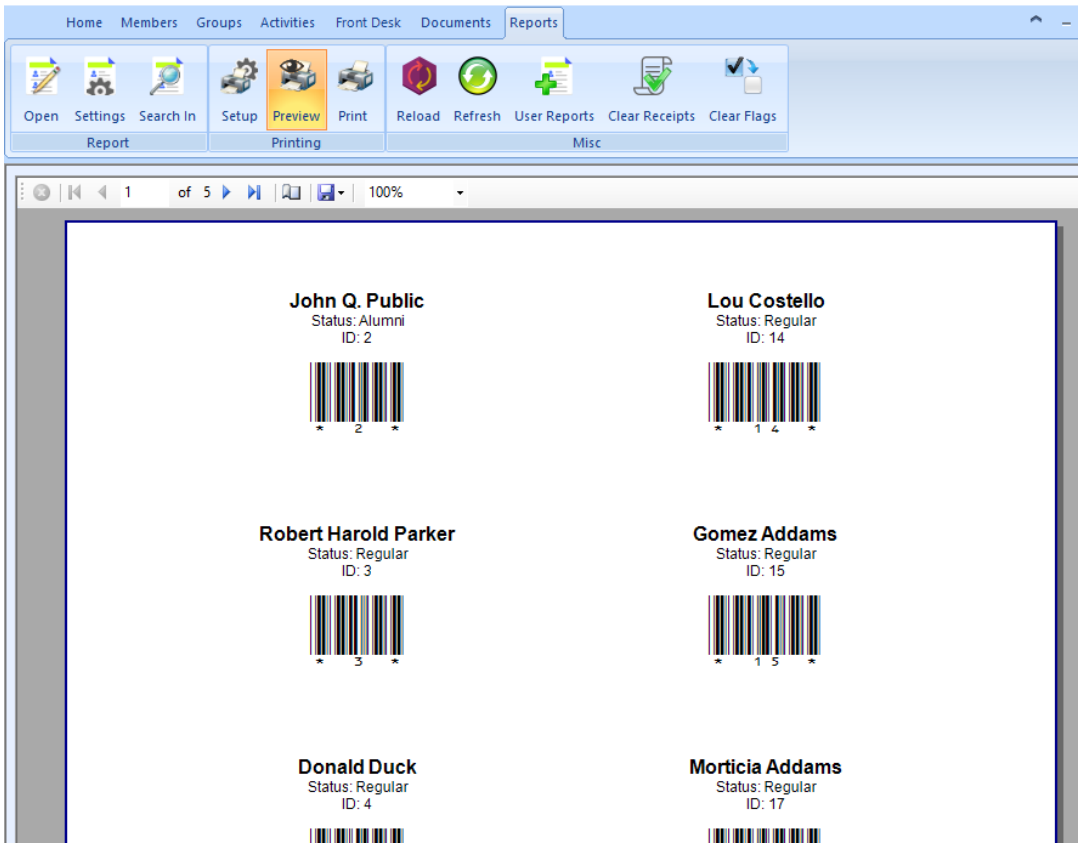
4. Preview the report and adjust the column widths appropriately. You'll probably want to make the Member ID field the full width of the card, and then center the text so it looks the best.



5. Save the card.

   Note: Depending on which font you use, you may need to add a start and stop character to the barcode. If so, use the Pretext and Posttext settings for the Member ID field. i.e., if the start/stop character is a "!", then when you add the column ID that uses the barcode font, enter a "!" for the pre- and post text values.

6. Now the report will be available to open normally.



Scanners

There are lots of scanners available. Once again, we like the ones at ID Automation, because they're ergonomic, and several models come with a stand that makes it easy to use unattended check-in mode. Be sure to get one that functions as a "wedge" or "keyboard wedge." i.e., the value scanned appears on screen as if you typed it on the keyboard. This will ensure that the scanned number appears in the active field in MemberTies.

Part XX

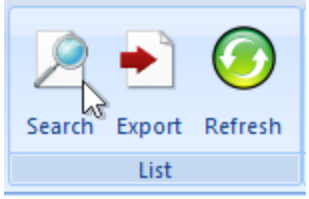
Searching for Records

20 Searching for Records

20.1 Overview

If you have a large database, searching for records will become a useful skill. If your database only has a hundred records or so, it may be easy enough to simply scroll down the list of members, groups, or activities to find the record you need. Even with a somewhat larger list, the quick search at the top of the list may be all you need to find a record.

As your data grows however, scrolling the list may be too cumbersome. This is when the search becomes very useful.



The above example shows the Search icon on the Membership List. The search icon is normally the first icon on the left side of the ribbon.

There are two types of searches: basic and advanced.

- The Basic search simply involves fill in a seat of predefined fields. The available fields vary based on the list that was active when the search was opened.
- The Advanced search enables you to create a much more specific search using relative date ranges, and/or linking between search clauses, and more.

20.2 Entering Basic Search Criteria

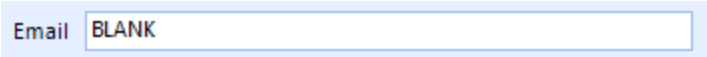
A basic search means you are going to simply fill in the predefined fields with the values you want to match in the records you are searching for. You do not have to use all of the available fields, in fact, if you don't use any of the fields you will retrieve all records (because you aren't trying to restrict the data to anything in particular).

The main thing to remember is that you should not enter any search value unless you really want EVERY record found to contain that value. For example, if you want to create a mailing list for all of your members, you shouldn't put a value in the City Name field, because that will restrict the records found to only those with the specified city name on their address.

Each search window displays the most commonly used search fields If you need to search using a more obscure field, or using more specific or complicated criteria, you should perform an advanced search if one is available on the window you are using.

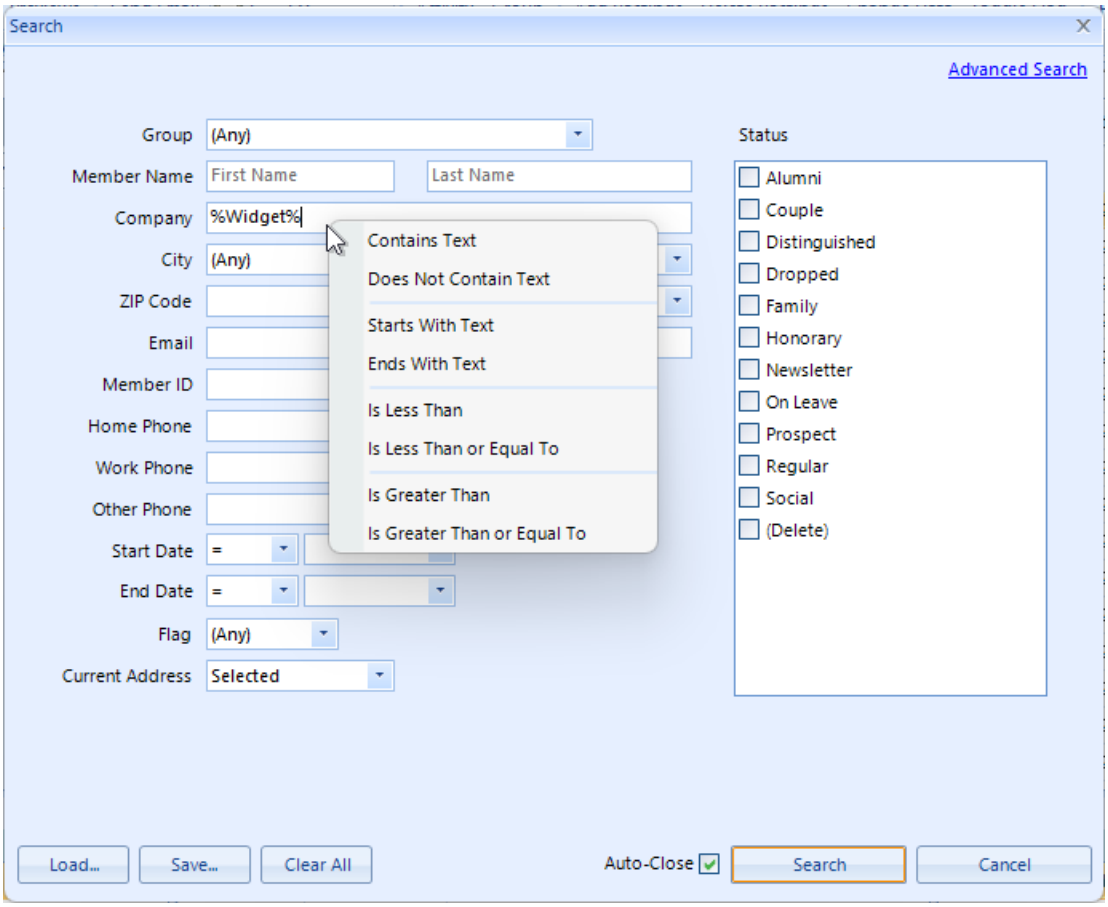
Note: A common question is, "How do I search for a blank (something). i.e., all members with a blank email address?" When using the Basic search, you can enter "BLANK" as the text of the field to find records where that field is empty, or "!BLANK" to find the opposite, i.e.,

records where the field is filled in. When using the Advanced Search, just choose the field and leave the value for the field empty.



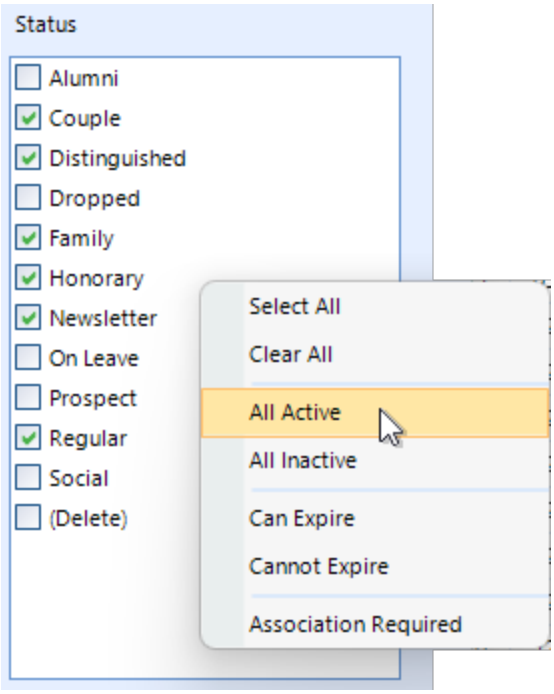
Finding records with no email

This is an example of the basic search on the Membership List:



Notice in the above example that a pop-up menu has been opened to help enter some special search criteria. This menu is displayed by clicking the right-hand mouse button on the desired field (in this case, the Company Name field). After choosing "Contains" from the menu, you simply change the word "text" in the field to be whatever portion of a word you are trying to match. For example, to find all companies with "widget" in their name, the field would be left as "LIKE %widget%" as shown above. You can also simply type the wildcard "%" symbols (or use an asterisk) as well without using the pop-up menu.

Note: On the Membership List basic search (shown above) a right-click menu is also available on the list of Statuses to enable selecting various sets.



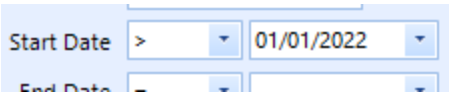
Using Barcodes or Magnetic Stripe Readers

If your members carry membership cards that contain a barcoded Member ID, you can scan it into the Member ID field to quickly search for that member.

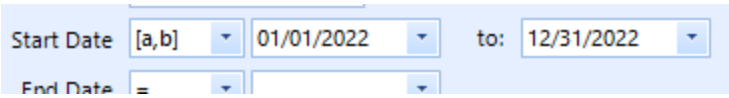
Dates and Date Ranges

Some date fields support an operator (=, >, etc) as well as a date range ([a,b]).

To use a non-range operator, select it and enter the date to compare. For example, this searches for records with a Start Date greater than a certain date.



To search for a range, switch to the Range operator. The "to" date field will appear, and you can enter the starting and ending dates of the range. This example will find all records with a Start Date between the two specified dates (including the dates themselves):



Wildcards - Special Expressions using LIKE and NOT LIKE

The percent symbol (%) the default "anything" wildcard symbol for the database. However, if the Allow Asterisk database preference is turned on, the asterisk can also be used. For this documentation, we will use the percent symbol in our examples.

The wildcard symbol is used to search for data that begins, ends, or contains specific text or numbers. For example, you might enter any of the following in the Last Name field:

- "Smith%" to get "**Smith**", "**Smith**e", or "**Smith**ington.
- "%burg" to get "Seder**burg**", "Franken**burg**", "Hidel**burg**"
- "%der" to get "Se**der**burg", "Fen**der**", and "**Der**ston"

The word "LIKE" is implied in searches like this. In other words, the system assumes you mean "LIKE %widget%" whether you type the word "like" or not. However, if you want to search in the opposite manner and find words that do **not** contain widget, you have to type "NOT LIKE" before the search. i.e., "not like %widget%" would find any record without the word widget in the company name.

Note: If you use a "%" symbol in a search field, the system will assume the word LIKE should be used with it.

> < <> The greater than, less than, and not-equal-to signs are used at the start of data to indicate a relationship to the data following the sign. These symbols can be used with letters or numbers. For example:

- **>300** in the Member ID field would get all records with a Member ID numbered 301 or larger (if the Require Numeric IDs preference is on).
- **>a** used in the Last Name field would return all records that have a Last Name beginning with b-z.
- **<>Smith** in the Last Name field would get all records with a Last Name other than "Smith," i.e., "not equal to Smith".
- **< 12/31/1999** in the End Date operator and date field would get all records with an End Date prior to 12/31/1999.

Multiple Criteria

Entering criteria in multiple fields enables you to build more complex searches.

For example to get all members who live in Dallas, TX, with a phone number beginning with 972 who joined prior to 01/01/1999, you would enter:

- "Dallas" in the City field
- "TX" in the State field
- "972%" (or 972*) in the Home Phone field
- "< 01/01/1999" in the Start Date operator and date fields

The key thing to remember when entering data in multiple criteria fields is that there is an implied "AND" for each value. So in the above example, the criteria would "read" as, "city = Dallas AND state = TX AND home phone starts with 972 AND start date is less than 01/01/1999". Every value must match for a record to be returned by the search.

Wildcards and Search Examples

Click to see several other Sample Searches

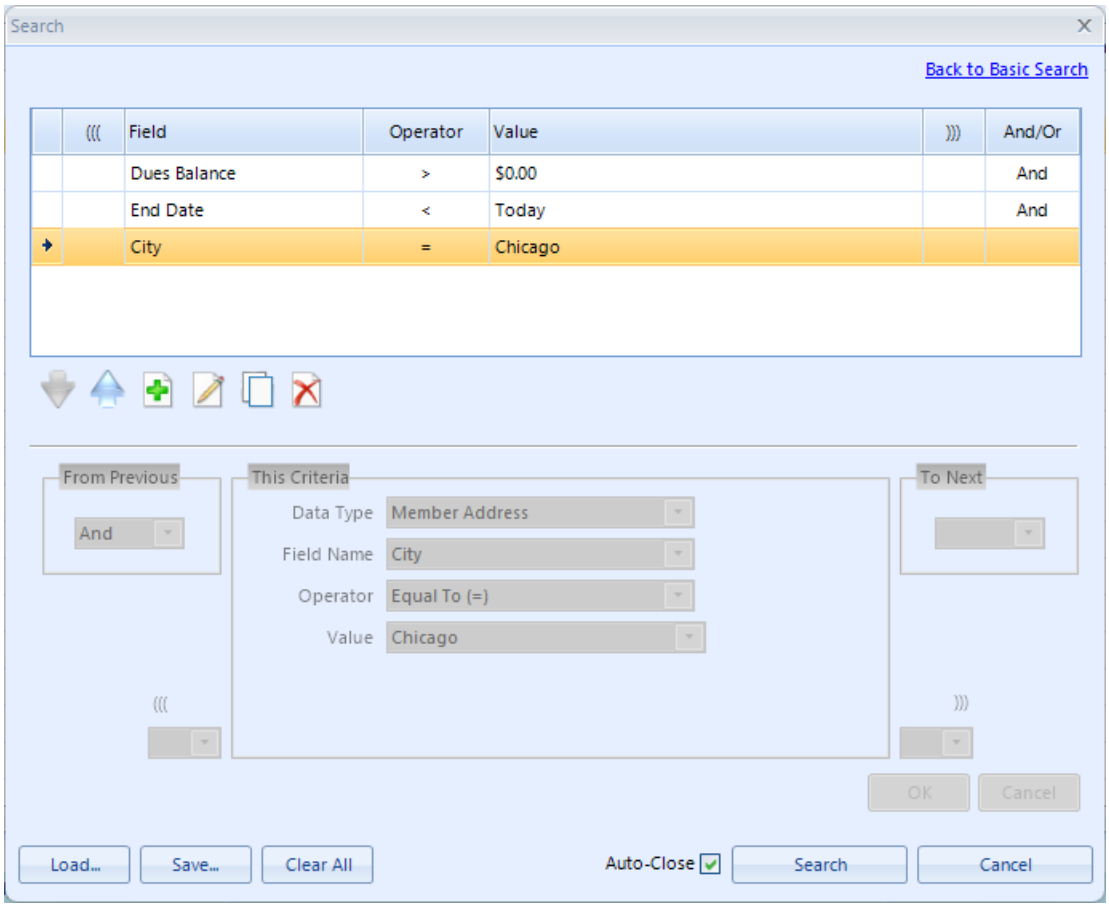
20.3 Entering Advanced Search Criteria

An advanced search can be an extremely powerful way of extracting very specific data from the database. An advanced search is available on membership, group, and activity lists, as well as reports and documents.

Unlike a basic search that gives you a set of predefined fields to pick from, a search using advanced criteria is built one field at a time, with each field represented by a new row on the advanced search criteria list.

Each row represents a specific criteria or "rule" that a record must meet in order to be displayed. If you create membership criteria that says Last Name = "Smith", then only membership records with "Smith" in the Last Name field will be found.

This is an example of the advanced search on the Membership List:



This search will require several things from every record displayed:

- The member must have a positive dues balance (i.e., greater than zero)
- The End Date on the record must be prior to today's date
- The city (on the Member Address) must be Chicago.

Building Criteria

Criteria is created row-by-row, with each row representing another criteria (you can think of it as a "rule") that must be true for a given record to appear on the report.

1. Click Add to create a new criteria row.
2. The editing area will enable, and it contains three main sections:
   - From Previous - shows how the current criteria will link to the previous, if applicable.
   - This Criteria
     - Data Type - the general type of data you want to query. This setting will determine the available Field Name options.
     - Field Name - the specific field to query
     - Operator - the way the stored value in the selected field will be compared to the Value. The operator choices will vary based on the selected Field Name
     - Value - the value to compare to data stored in the selected Field Name. The way a Value is entered will vary based on the selected Field Name. Dates have special options for choosing a specific or relative date; lists will display the relevant list to select a value; numeric fields will only allow numeric values, etc.
   - To Next - this shows how the current criteria row will link to the next, if applicable.
3. After making your selections, click OK to add the new criteria to the list.
4. You can also Edit an existing criteria row, Copy it as a new row, or Delete it, using the other icons below the list.

More than One Criteria

When you have several criteria rules you want checked, the system needs to know if you mean "this criteria AND that criteria" or you mean, "this criteria OR that criteria" since there is a big difference. To control this, there is an option to specify AND or OR at the end of each row of criteria, to tell the system how to link your criteria together.

Consider this set of criteria:

	(((	Field	Operator	Value	)))	And/Or
→		State	=	TX		And
		City	=	Dallas		And
		City	=	Houston		

... the search will not find anything. This makes sense if you think about it, because no member has a city set to two different things at the same time (in this case, Dallas and Houston). There is only one city field on an address and it only accepts one entry.

If the criteria was changed to:

	(((	Field	Operator	Value	)))	And/Or
➔		State	=	TX		And
	(	City	=	Dallas		Or
		City	=	Houston	)	

...the search will work, because now it can find members in Texas with a city of Dallas *OR* a city of Houston -- it doesn't have to match both cities, but still has to match the state.

Using Parenthesis

You may notice that the second example also includes parenthesis around the city rules. Parenthesis are very important if you use an OR to join your criteria rows, especially when there are other parts of the criteria besides the part using the OR.

If, in the above example, we removed the left and right parenthesis, the query would now produce unpredictable behavior, because it would essentially "read" as "state of Texas and city of Dallas or city of Houston without regard to the state". Thus, records could be returned for Dallas, Missouri; Dallas, Texas; Houston, Florida; and Houston, Texas. Parenthesis avoid ambiguity. A good rule to follow is, if there is an *or* anywhere in the criteria, use parenthesis around it to make sure it is treated as one unit.

Wildcards and Search Examples

Click to see several other Sample Searches

Address Criteria

When using MemberTies Professional, if you use address fields as part of your criteria, i.e., "City = My Town", and your membership records often include multiple addresses, there are two fields that may be important:

- Active Address - by default, the search assumes you only care about the active address. Use this field to tell it to use the inactive address.
- Address Type - if you are only looking for matches on addresses marked as "Work" or "Summer Home" or whatever, use the address type to specify that.

If you don't use this criteria, the system will automatically assume you want to use the active address whenever it needs to look for address data. That means if a member has a Home Address in "My Town" and a Summer Address in "Your Town", the record won't be displayed unless the Home Address is marked as Current on the membership record.

Include in Mailings, Include on Reports

By default, any mailing label report will automatically honor the "Include in Mailings" flag, and other reports will do the same for the "Include on Reports" flag. This means if a record has both of these options turned off, it will not appear on reports. If you want to override this behavior, use the appropriate flag in your search criteria and specify exactly which setting is needed.

To Save and Reload Search Criteria

See Saving Advanced Criteria.

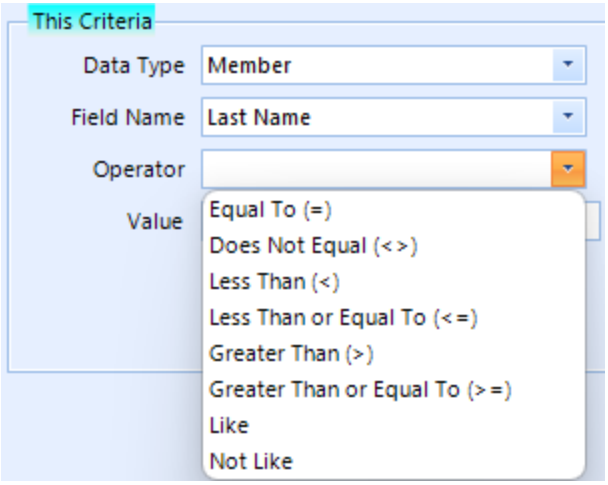
20.4 Selecting an Operator

Operators are what the system uses to compare one value to another, so a completed criteria entry is composed of a **Field Name**, an **Operator**, and a **Value**.

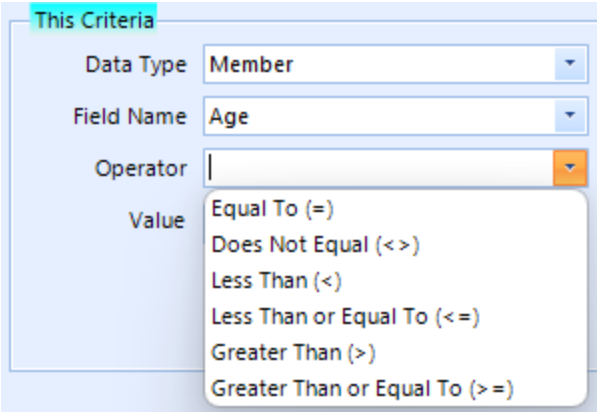
In this example, "=" is the operator, which indicates that for any record to appear in the results, the Last Name field on that record has to be "Smith."

	(((	Field	Operator	Value	)))	And/Or
➔		Last Name	=	Smith		

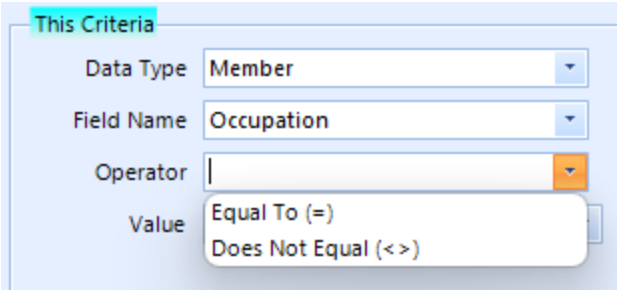
When creating criteria, the list of operators will contain options appropriate to the selected Field Name. For example, if you choose a text field like "Address" or "Comments", all options will be available. However, if you choose a field that uses a list of values (such as Country), the only options will be Equal and Not Equal.



Options for Text



Options for Numbers



Options for Lists

It may seem odd that the > (greater than) or < (less than) operators are available for text, but it is perfectly legal to search for "Last Name < d" to find every record with a list name that starts with a, b, or c.

The following operators may be available:

- Equal - indicates that the field data must exactly match the value
- Not Equal - indicates that the field data must not match the value
- Greater Than - indicates that the field data must be larger than the value. For numeric values, it means the data must be numerically larger. For text values, it means the data must sort alphabetically after the value. i.e., "> b" means the data must start with "c-z".
- Greater Than or Equal - indicates that the field data must be equal to or larger than the value. See "Greater Than".
- Less Than - indicates that the field data must be smaller than the value. For numeric values, it means the data must be numerically lower. For text values, it means the data must sort alphabetically before the value. i.e., "< d" means the data must start with "a, b, or c".
- Less Than or Equal - indicates that the field data must be equal to or smaller than the value. See "Less Than".

- LIKE - indicates that an expression will be used to match data to a value using the % wildcard character. i.e., "%smith%" will search for the word "smith" within the data, since the leading and trailing % symbols indicate that any text can come before or after the word.
- NOT LIKE - indicates that an expression will be used to look for non-matching data using the % wildcard character. See "LIKE".
- RLIKE - Similar to LIKE, but with regular expressions.
- NOT RLIKE - Similar to NOT LIKE, but with regular expressions.

20.5 Selecting a Criteria Value

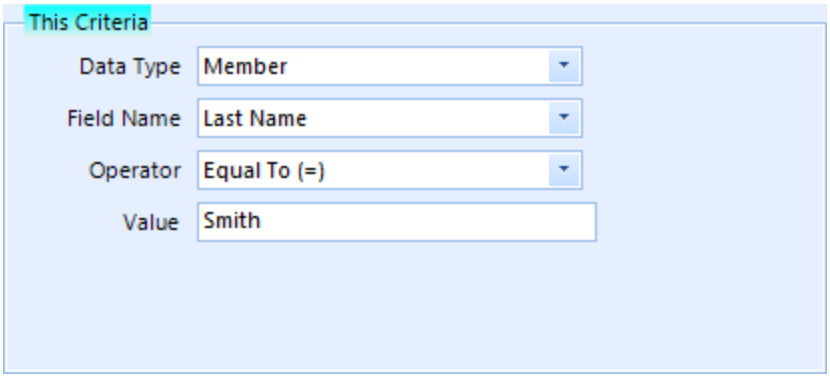
A completed criteria entry is composed of a **Field Name**, an **Operator**, and a **Value**. In the above example, "Smith" is the value, which indicates that for any record to appear in the results, the Last Name field on that record has to be "Smith."

The advanced search list has to do a lot of thinking in the background to be sure the right options are presented to you based on the field you select. For this reason, the actual data entry field used to enter the value will change based on the Field Name and sometimes the Operator as well.

	(((	Field	Operator	Value	)))	And/Or
➔		Last Name	=	Smith		

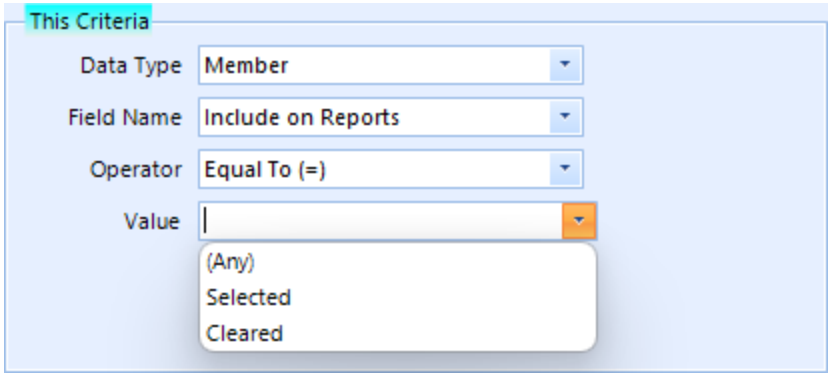
Note: To search for records with a blank value, leave the value field empty. i.e., criteria like, "Email Address = [nothing]" will find records with nothing in the email address field.

Entering a Standard Value



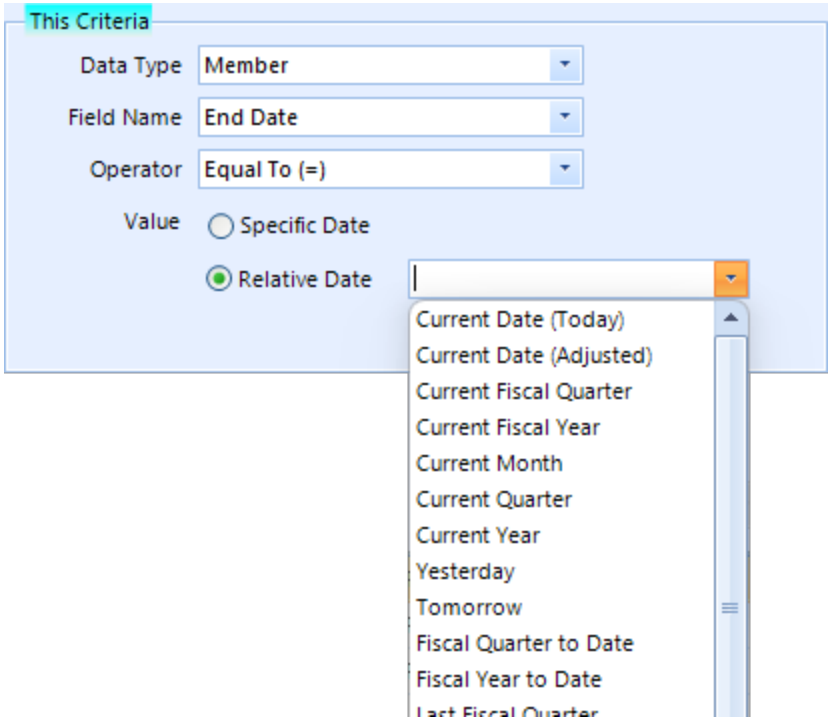
The above example shows the entry field for a plain text value. The value field simply allows the entry of text. Since most fields in the system (such as "Last Name") are standard text fields, the input field will normally let you type whatever you wish. If the field only allows numeric data, such as a currency field, the data entry field also restricts itself to numeric values.

Entering a Switch Value



Fields that let you choose between on and off or "any" setting.

Entering a Date Value



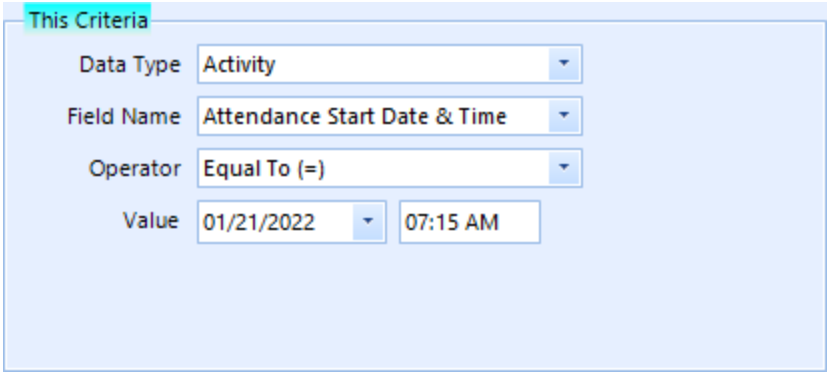
There are a number of ways to specify a date. If you choose "Specific Date", a standard date field is provided, but the real power of date criteria comes with the use of Relative Dates, meaning the date is determined at run-time relative to the current date.It can be relative to the current date, a specific day, or a specific kind of date. There are several relative date options, including:

- Current Date (Today) - to find records matching the current date when the search is run
- Current Date (Adjusted) - to find records with a date that is a number of dates before or after the current date. A negative number such as "-10" means the date must fall within

the preceding 10 days of the day the search runs. A positive number such as "30" means the date must fall within the 30 days after the search runs. This is a great way to answer the a question like, "which members have an End Date coming up within the next month?" Simply search for End Date < Current Date +30, i.e., an End Date less than 30 days from now.

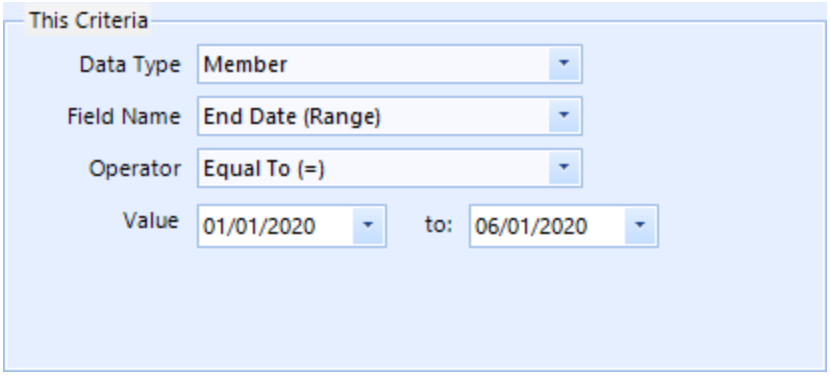
- Most other options are self-explanatory. (The Fiscal options use the Fiscal Year preference setting to determine what the quarter or year is.)

Entering a Date & Time Value



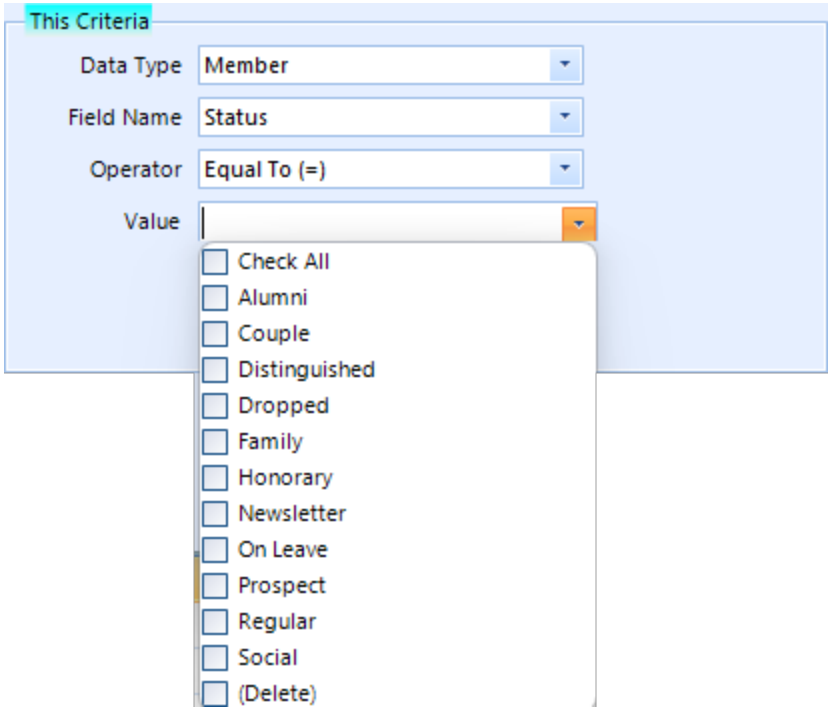
When the field supports both date and time, there are no relative date options available.

Entering a Date Range value



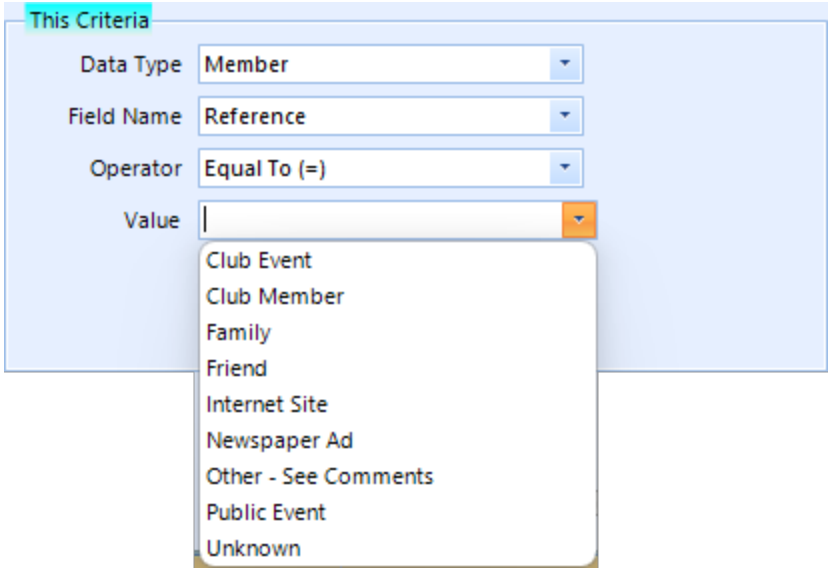
The operator for a date range can also be Not Equal to, which means any record that falls *outside* the specified range.

Entering a Status or Multi-Option Value



When the membership status is used for criteria, the list enables you to select more than one option by ticking the boxes next to each option. If you choose more than one, the system responds the same as if you made multiple criteria entries using "or". i.e., "The status must be equal to Alumni or Family or Regular."

Entering a Dropdown List Value



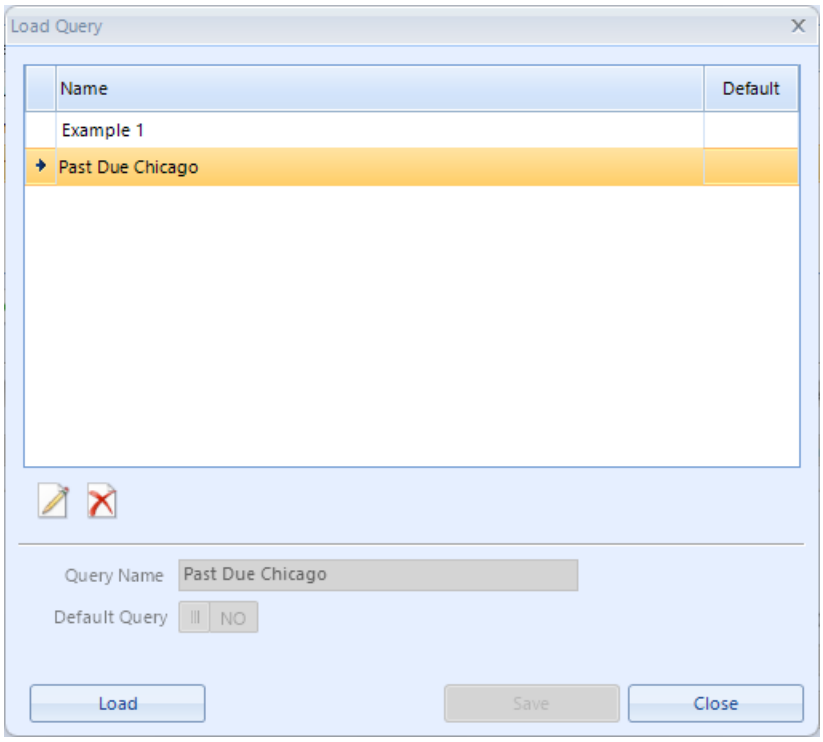
Fields that display as lists in the application use the relevant list when used as criteria.

20.6 Loading Criteria

Basic and Advanced criteria can be saved and then reloaded later when you want to run a particular search again. This is particularly helpful for complex searches that take a lot of time to set up. The Load and Save buttons are located at the bottom of the search window next to the Clear All button (which clears the criteria).

Loading Saved Criteria

1. To reload the search, click the "Load" button.



2. If you would like to edit (rename or change the default status) or delete a saved query, you can do so.

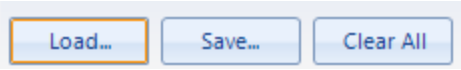
3. Select the desired query.

4. Click Load. The search window will refresh itself to display the appropriate basic or advanced search screen with the selected criteria loaded.

20.7 Saving Criteria

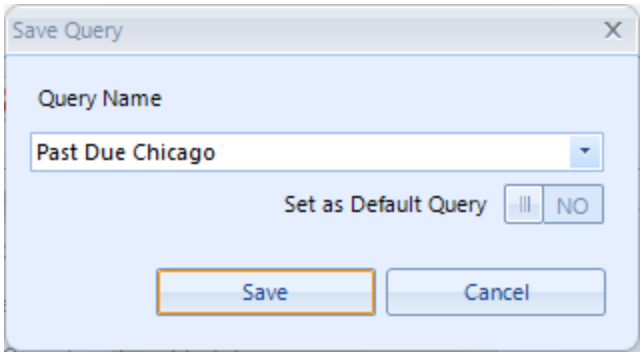
Basic and Advanced criteria can be saved and then reloaded later when you want to run a particular search again. This is particularly helpful for complex searches that take a lot of

time to set up. The Load and Save buttons are located at the bottom of the search window next to the Clear All button (which clears the criteria).



Saving Query Criteria

1. After your criteria is working correctly, click Save.



2. The Save Query window enables you to enter a new name, or to select an existing saved query name from the list. You can also specify that the query is to be the default, loaded automatically.

3. Click Save to store the query for reuse.

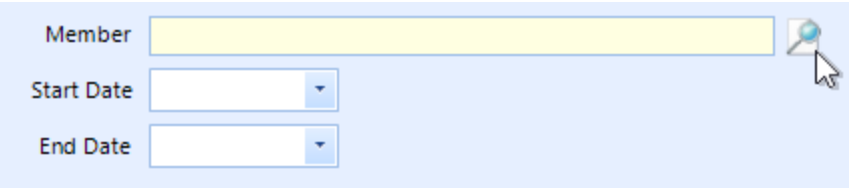
1. If you would like to edit (rename or change the default status) or delete a saved query, you can do so.

2. Select the desired query.

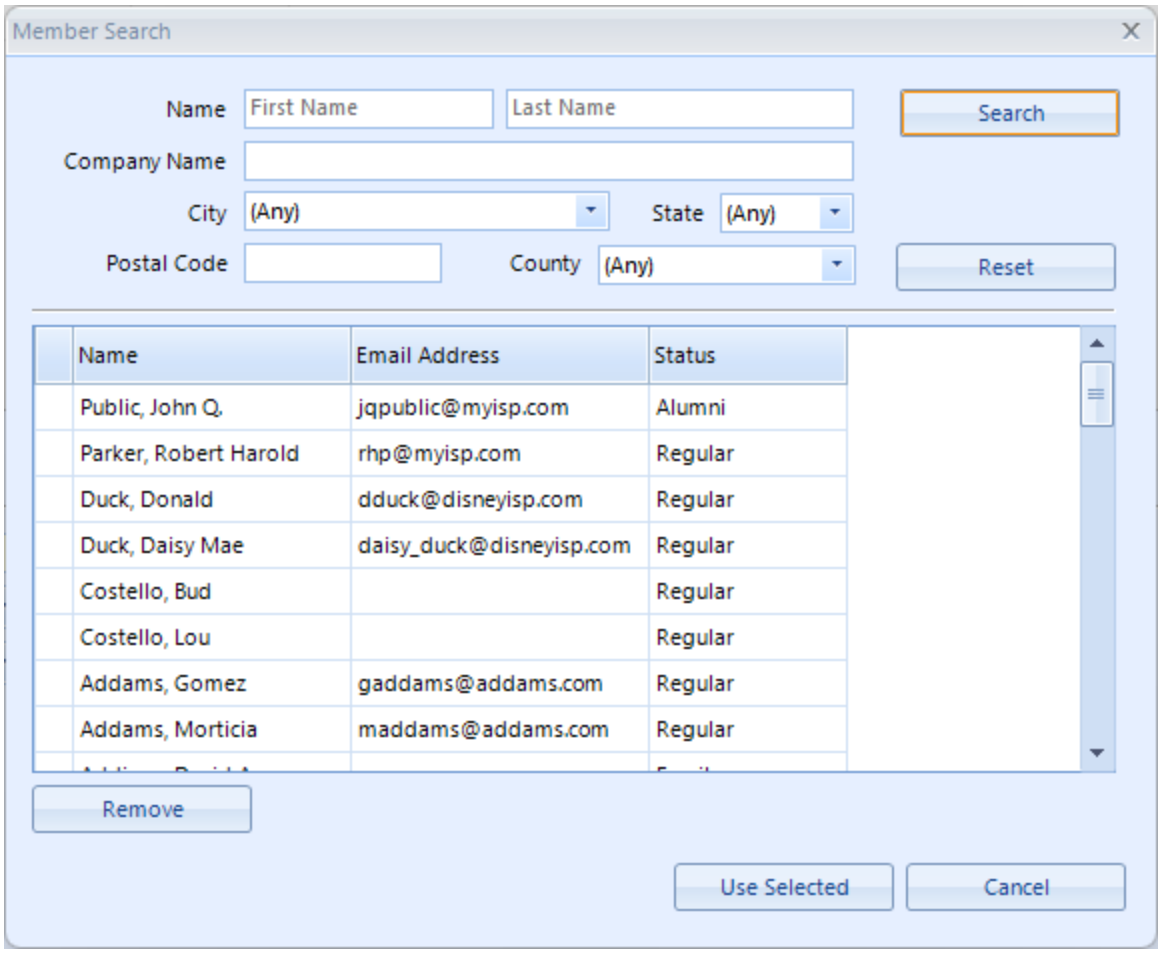
3. Click Load. The search window will refresh itself to display the appropriate basic or advanced search screen with the selected criteria loaded.

20.8 Using the Quick Search Window

There are several places in the system where you are allowed to search for a membership or group record while you're inside of another record. For example, if you're adding members to a Group, or associating an existing member to another member.



This is the quick search window for selecting a member.



The fields available for searching are limited to some key fields based on the type of record for which you are searching. In this example, key name and address fields are provided to help find a member.

20.9 Advanced Search Examples

This topic provides various examples of more complex Advanced searches, as sell as ways to use complex expressions in Basic searches.

Here are some common searches:

Desired Result	Criteria Example		
	Field Name	**Operator**	**Value**
Members with a Chicago address	City	=	Chicago

Members with an End Date in the next 30 days	End Date End Date	> <=	Today AND Today +30
Members with an End Date in a range	End Date (Range)	=	01/01/2020 to: 01/01/2022
Members with a negative dues balance	Dues Balance	<	0.00
Everyone except "Alumni" status	Status	<>	Alumni
Members with at least 2 relationships	Count of Associations	>=	2
Members with no email address	Email	=	[leave blank]
Members with no email address (another option)	Email	NOT LIKE	%@%
Members with a phone number starting with 555	Home Phone	LIKE	555%

Wildcards - Special Expressions using LIKE and NOT LIKE

The percent symbol (%) the default "anything" wildcard symbol for the database. However, if the Allow Asterisk database preference is turned on, the asterisk can also be used. For this documentation, we will use the percent symbol in our examples.

The wildcard symbol is used to search for data that begins, ends, or contains specific text or numbers. For example, you might enter any of the following in the Last Name field:

- "Smith%" to get "**Smith**", "**Smith**e", or "**Smith**ington.
- "%burg" to get "Seder**burg**", "Franken**burg**", "Hidel**burg**"
- "%der" to get "Se**der**burg", "Fen**der**", and "**Der**ston"

The word "LIKE" is implied in searches like this. In other words, the system assumes you mean "LIKE %widget%" whether you type the word "like" or not. However, if you want to search in the opposite manner and find words that do **not** contain widget, you have to type "NOT LIKE" before the search. i.e., "not like %widget%" would find any record without the word widget in the company name.

Note: If you use a "%" symbol in a search field, the system will assume the word LIKE should be used with it.

> < <> The greater than, less than, and not-equal-to signs are used at the start of data to indicate a relationship to the data following the sign. These symbols can be used with letters or numbers. For example:

- **>300** in the Member ID field would get all records with a Member ID numbered 301 or larger (if the Require Numeric IDs preference is on).
- **>a** used in the Last Name field would return all records that have a Last Name beginning with b-z.

- **<>Smith** in the Last Name field would get all records with a Last Name other than "Smith," i.e., "not equal to Smith".
- **< 12/31/1999** in the End Date operator and date field would get all records with an End Date prior to 12/31/1999.

Complex Expressions Using LIKE and NOT LIKE

If you are comfortable with the concepts of LIKE and NOT LIKE, the following table provides several advanced examples of ways to use wildcards and expressions for even more precise queries. Note that while "LIKE" is implied as described above; you must precede the expression with "NOT LIKE" to search for the opposite.

Expression	Searches for...	Sample Return Data
Mc%	Names that begin with the letters "Mc"	McEvoy
%er	Names that end with "er"	Brier, Miller, Weaver, Rayner
%en%	Names containing the letters "en"	Pettengill, Lencki, Cohen
_ish	Four-letter names ending in "ish"	Fish
Br[iy][ae]r	Brier, Bryer, Briar, or Bryar	Brier
[M-Z]owell	Names ending with "owell" that begin with a single letter in the range M to Z	Powell
M[^c]%	Names beginning with "M" that do not have "c" as the second letter	Moore, Mulley, Miller

As illustrated above, the % (percent) symbol will be replaced by any number of characters, whereas the _ (underscore) symbol can only be replaced by one character.

Text within brackets ([ ]) will be required unless preceded by the carat (^) symbol, in which case the text is disallowed.

The following examples illustrate various uses of the Advanced search criteria capability:

Finding Expired Members

This search illustrates what it might look like to search for all members whose membership (and probably their dues) have expired. Since MemberTies assumes that you will reset the End Date to a point in the future when someone pays their dues, it can also be assumed that anyone with an End Date in the past is probably past due.

	(((	Field	Operator	Value	)))	And/Or
➔		Status	=	(Multiple)		And
		End Date	<=	Today		

The Status on the first row displays "Multiple Statuses," because we have selected each of our dues-paying statuses. The value for End Date displays as "Today," meaning that the date in the query will automatically be replaced with the current date when the search runs.

With these settings, this search will only find records that pay dues and have an End Date in the past.

Note: Using MemberTies Professional, you can post dues as debits and credits. Therefore, it might make more sense to assume that any member with a Dues Balance less than 0.00 is past due. You could accomplish this using the Dues Balance criteria field name.

Using a Date Range

These examples illustrate two different ways to search for all records with a Start Date that falls within the month of November.

Example 1: Use a beginning and ending date as a date range.

	(((	Field	Operator	Value	)))	And/Or
➔		Start Date	>=	11/01/2022		And
		Start Date	<=	11/30/2022		

Example 2: Use the month and year versions of the Start Date to restrict to one month.

	(((	Field	Operator	Value	)))	And/Or
➔		Start Date (Month)	=	November		And
		Start Date (Year)	=	2022		

Example 3: If the year isn't important, use only the month of November.

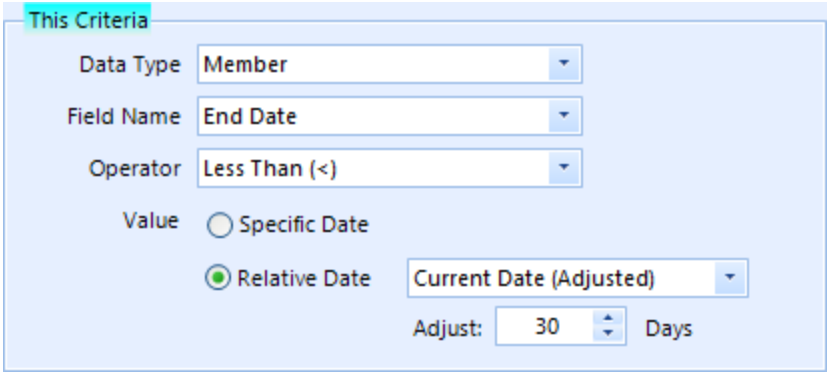
	(((	Field	Operator	Value	)))	And/Or
➔		Start Date (Month)	=	November		

Example 4: Use the range to specify both dates on a single entry.

	(((	Field	Operator	Value	)))	And/Or
➔		Start Date (Range)	=	11/01/2022 - 11/30/2022		

Using a Relative Date

This example illustrates how to search for a relative date, i.e., all records with an End Date that occurs within the next 30 days.



Notice that 30 is entered into the Adjust field. This tells the system to find records with an End Date starting today, and going +30 days into the future.

Likewise, you could enter -30 to find records with an End Date within the previous 30 days.

Correct vs Incorrect Use of "AND" and "OR"

These examples attempt to retrieve all members who live in Dallas, TX or Houston, TX.

	(((	Field	Operator	Value	)))	And/Or
		State	=	TX		And
		City	=	Dallas		And
		City	=	Houston		

Example 1

	(((	Field	Operator	Value	)))	And/Or
		State	=	TX		And
	(	City	=	Dallas		Or
		City	=	Houston	)	

Example 2

Example (1) is incorrect, because it is telling the system to retrieve anyone in Texas who live in Dallas And Houston at the same time.

Example (2) solves this problem by simply surrounding the city portion in parenthesis and using OR. Now the query tells the system the records must have city of (Dallas or Houston), and a state of Texas. This query will bring back a much smaller set of records.

Part XXI

Security

21 Security

21.1 Working with Security Groups

MemberTies is designed to enable you to secure various actions that a user could perform in the system, such as adding members, viewing reports, or opening credit card data. Security settings are created and applied with Security Groups. You can create any number of security groups, each with different security options enabled and disabled.

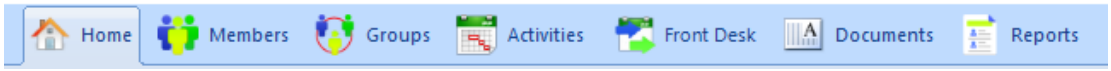
By default, every new user is assigned to an unrestricted security group. If you don't change this setting, the user will have access to everything in the system (other than things restricted to the administrator user, of course).

Security Groups require time to setup correctly, but save you time in the long run. Since there are almost 200 different security settings available, setting up a new user with security options like another user would be very time-consuming. With Security Groups, you only need to setup a particular set of rules once, and then you can apply it to any user you wish. Of course, if you have no need for security, you can just leave users set to "All Access."

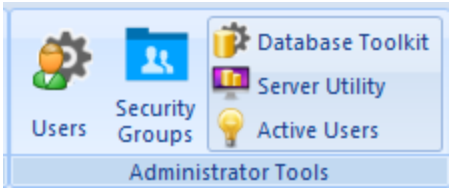
The Security Group window provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

Working with Security Groups

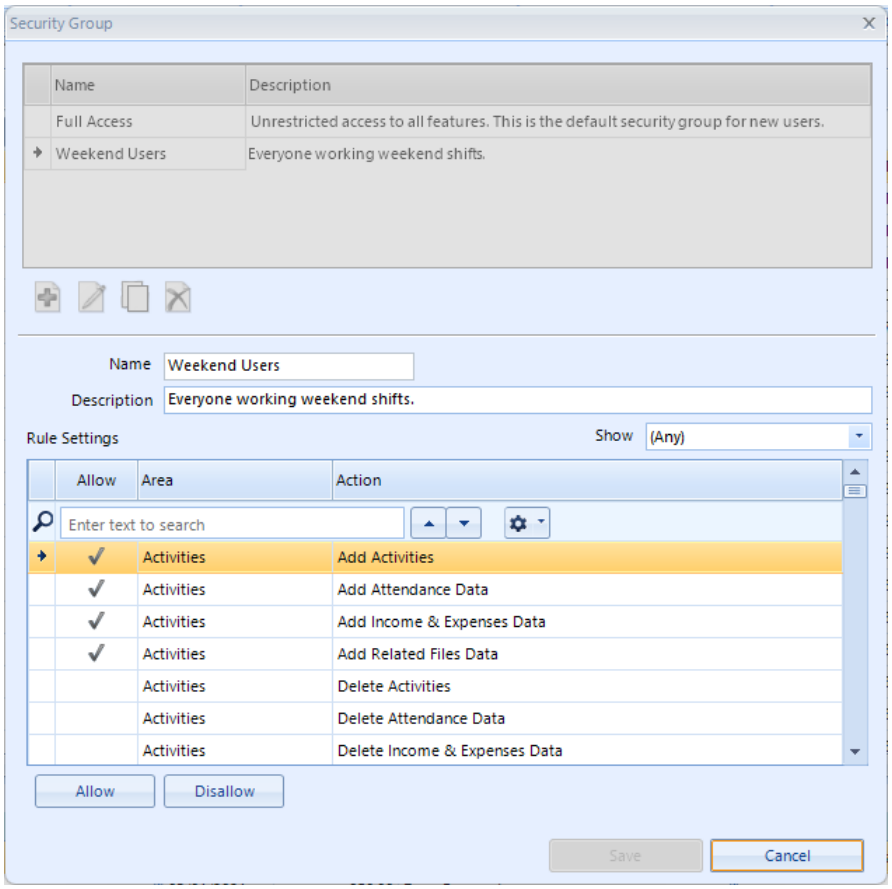
1. Log in as the mtadmin user.
2. Choose the Home workspace by clicking the Home tab above the ribbon.



3. In the Administrator Tools section of the ribbon, click Security Groups.



4. The Security Groups window will open.



5. To create a new Security Group, click Add, or select an existing group and click Edit, Copy, or Delete.

6. The following fields are available:

   - Name - the name of the security group that will be displayed in the "Security Group" list when working with a user account
   - Description - a general description of the group
   - Show - enables filtering the list to certain areas or action types. This is useful for quickly selecting all Delete actions and disallowing them, for example.
   - Allow - marks the selected list records as allowed for the security group
   - Disallow - marks the selected list records as disallowed for the security group

7. When finished, click Save.

Usage Notes

Some security rules depend on other rules to be enforceable; for example, consider the following settings:

- Members: Add Dues Data is Allowed
- Members: Open Dues is Disallowed

No users with this security group will be able to add dues data, because they are not allowed to open the Dues Page in the first place.

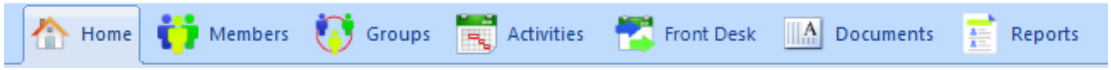
21.2 Viewing Security Settings

Normal users can view their security settings at any time, though they cannot make changes.

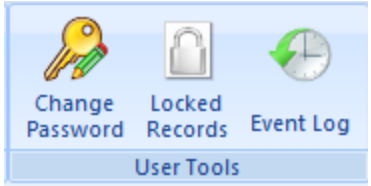
This option is not available when running as the mtadmin because that is a system user that has rights to everything.

Viewing Your Security Settings

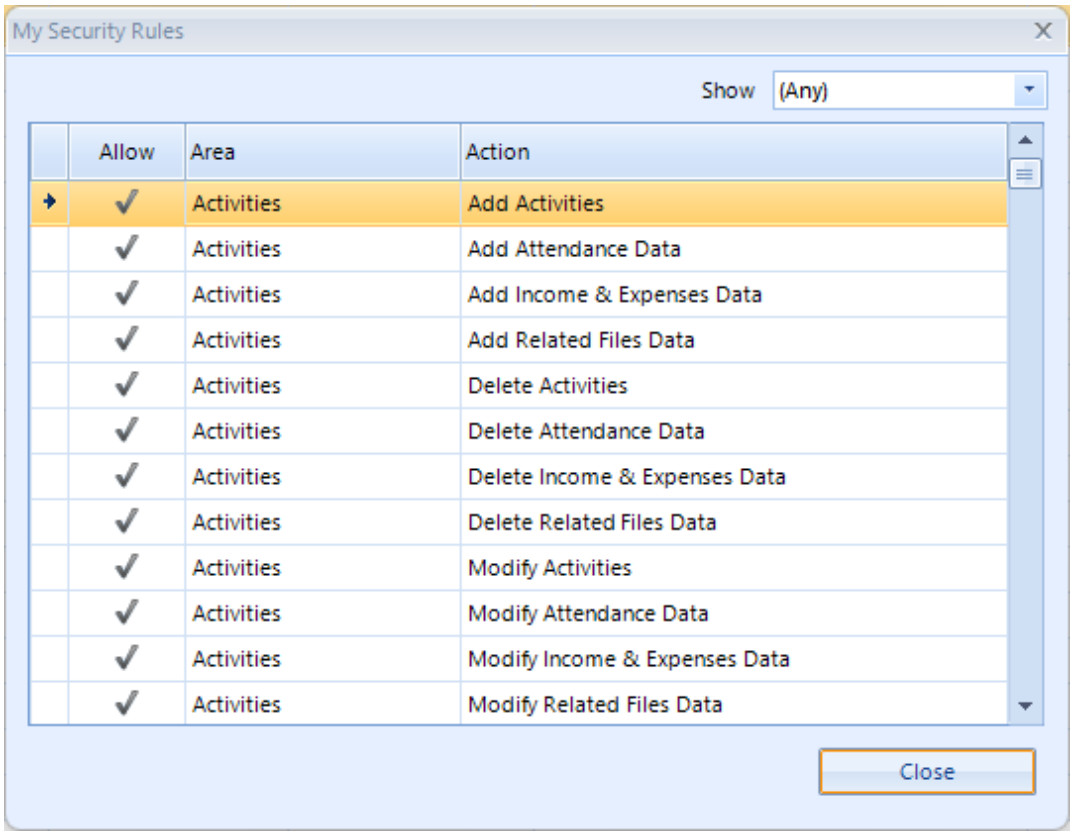
1. Choose the Home workspace by clicking the Home tab above the ribbon.



2. In the User Tools section of the ribbon, click Security.



3. The My Security Rules window will open.



4. The "Show" list above the grid enables filtering the results to a specific type of rule, for easier review.

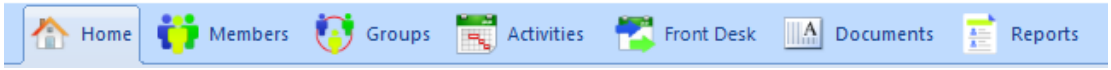
21.3 Viewing Active Users

The Active Connections window displays a list of all users currently connected to the active database. This list appears automatically if you try to log in and the maximum number of connections allowed by your license has already been reached (if you do not have a license, the maximum number of connections is one.)

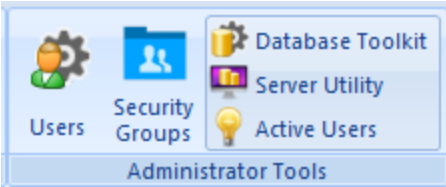
The administrator user can also display this window at any time.

Showing Active Users

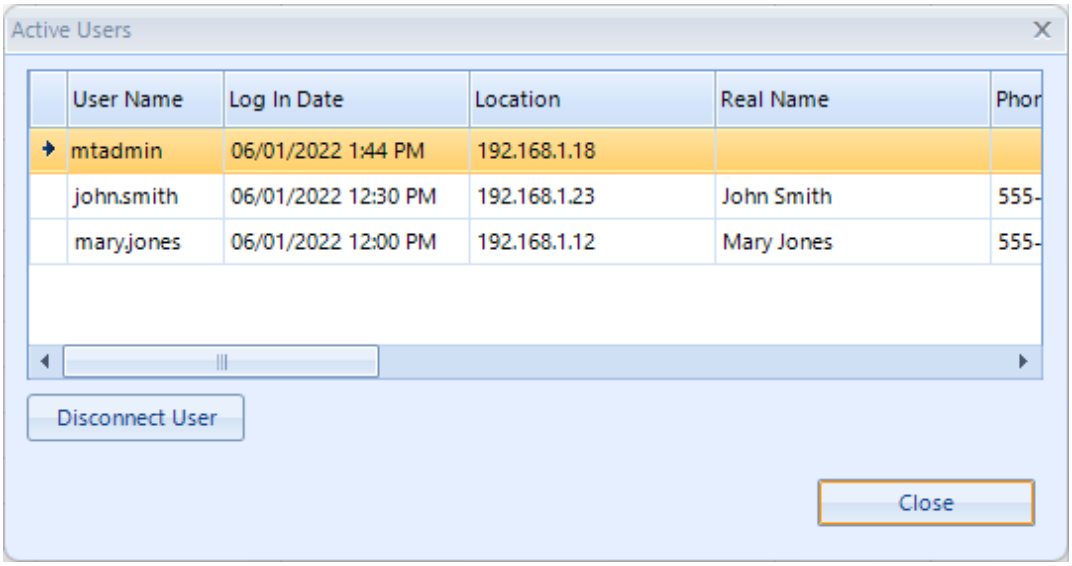
1. Log in as the mtadmin user.
2. Choose the Home workspace by clicking the Home tab above the ribbon.



3. In the Administrator Tools section of the ribbon, click Active Users.



4. The Active Users window will open.



5. The list shows each currently connected (logged in) user, the date they logged in, and the IP address of the connection.

6. If a user is shown that you know is not actually logged in, you can disconnect them by selecting the record and clicking Delete. This typically happens when a computer crash or power failure prevents MemberTies from cleanly finishing the normal Log Out process.

   Note: Do not disconnect a user if they really are logged in! The disconnection process will kill their server connection, and they will get lots of database errors and will be forced out of MemberTies without a chance to save or exit normally.

7. When you are finished, click Close.

21.4 Using the Event Log

MemberTies Professional includes an "event logging" feature that will maintain a log activity in the system and "high level" record changes. By "high level" we mean that the system will not

track the change to each and every field. There are two reasons for this: 1) the resulting log would be massive, and 2) the log would not be very readable, because it would have to track the actual values the database knows about, i.e., "statecd changed to 17" isn't very user friendly.

Instead, the event log will note that a record was opened, updated, created, deleted, or closed, and will also track things like email sent , check-ins, and various other changes in the system.

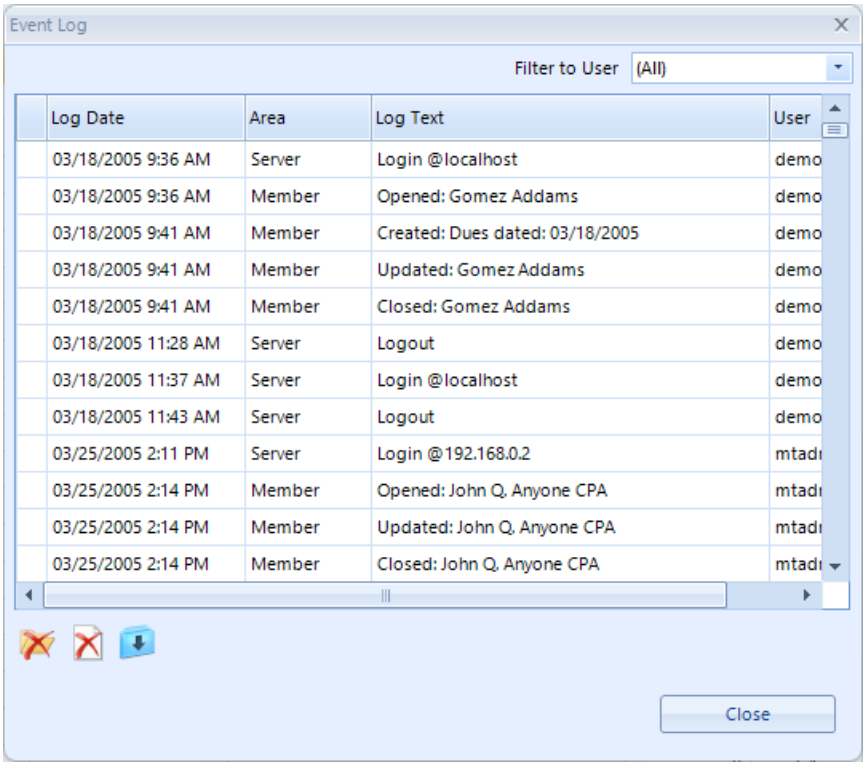
If database size is a concern, it is recommended that you export the log to a file on a regular basis, and then clear the log table. The appropriate schedule must be determined based on the activity in your database.

Note:

- Several Security Group settings apply to the event log, allowing you to control who can enable it, open it, modify it (delete entries).
- The event log is controlled by the Event Logging database preference. The preference is turned off by default.

Viewing the Event Log

1. On the Home ribbon, User Tools section, click Event Log

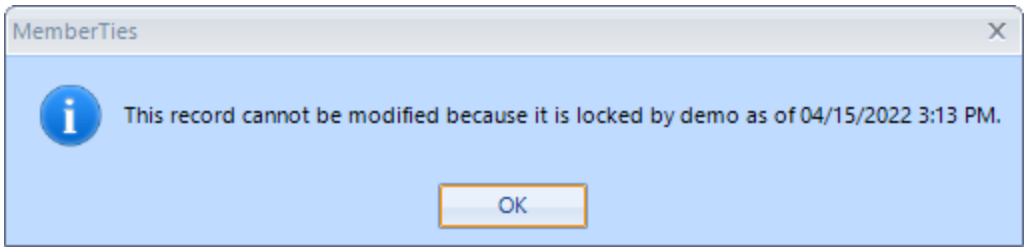


2. Use the icons below the list to delete the entire log, delete selected entries, or save the log to a file.

21.5 Record Locking

If the license in use allows more than one user to be logged in at a time, the system will use a record locking process to try to prevent two users from updating the same record at once. If your license only allows a single user, no record locking is used.

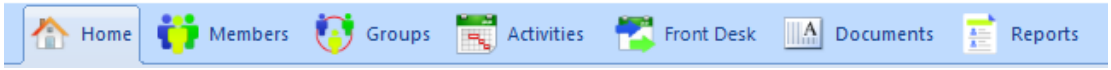
For example, suppose user "sally" logs in and opens a membership record. The system will make an entry in its records that sally now "owns" that record. Now if user "joe" logs in and tries to open the same record, he will receive a message similar to:



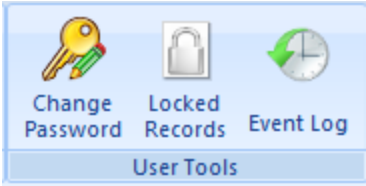
Viewing Record Locks

Any user can view record locks, and by default, any user can remove locks. The Unlock Records security rule can be used to prevent certain users from being able to remove record locks.

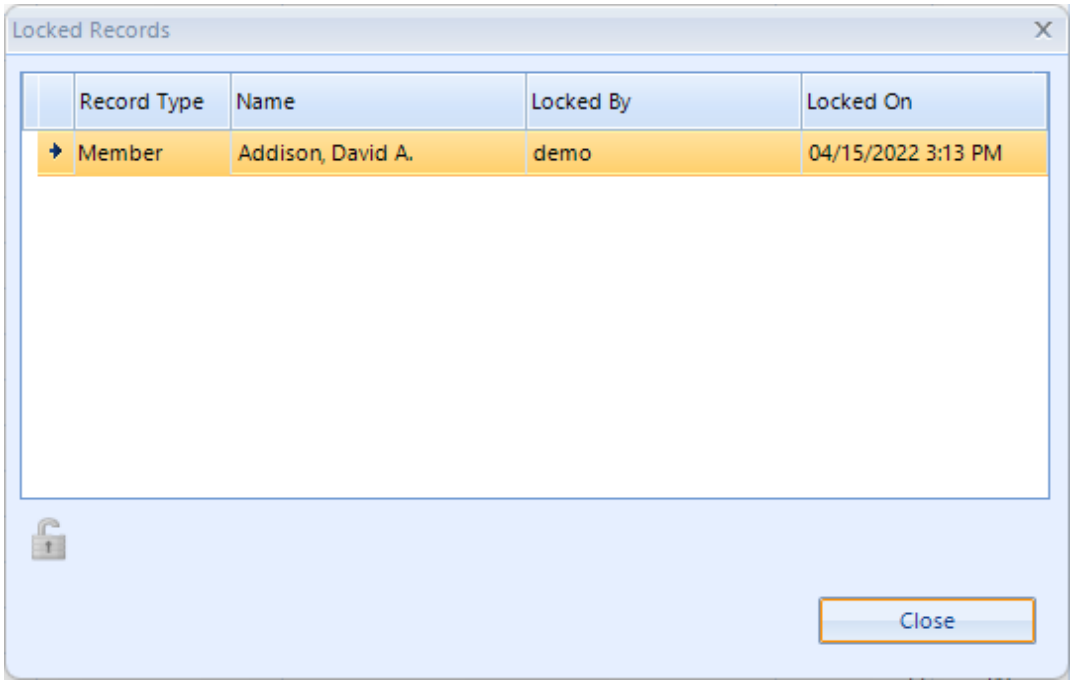
1. Choose the Home workspace by clicking the Home tab above the ribbon.



2. In the User Tools section of the ribbon, click Locked Records.



3. The Locked Records window will open.



4. If you are certain that the "Locked By" user is not actually using the record, click the Unlock icon free the record. If you have the appropriate Security Setting to unlock records, the lock will be removed.

   Note: It is important to be certain the record is not in use before removing the lock. If the record is still being used, removing the lock will allow other users to open and change the record at the same time. This could cause data to be lost or overwritten as each person saves their changes.

5. When you are finished, click Close.

Part XXI

Server Utility

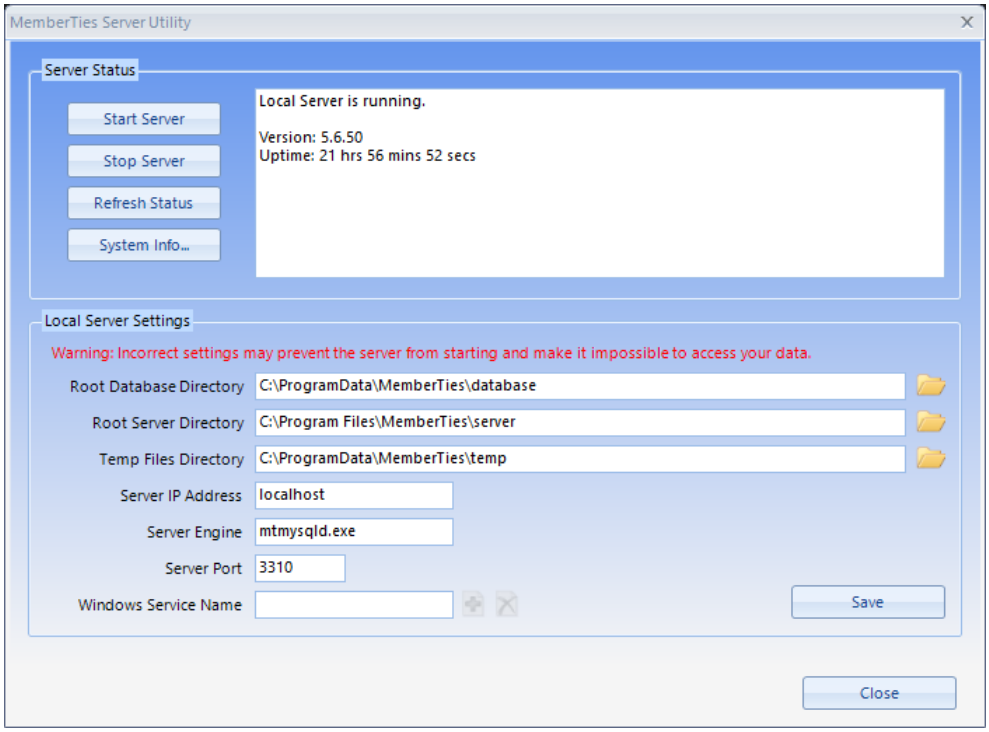
22 Server Utility

22.1 Overview

The server utility is a small program that enables you to do certain things with the database server without having to start MemberTies at all. It enables you to configure server settings, and start/stop the server manually if necessary.

The server utility has a separate executable file located in the MemberTies program directory called "mtsrv.exe". (There should also be an icon for it in the Start Menu along with the MemberTies icon.)

Note: The server utility window is a way to look at the server that is running in the background. It is not the server itself. You can open and close the utility without affecting whether the server is running or not. The only way to manually shutdown the server is to click "Stop Server". Closing the window will have no effect.



When you launch the utility, it will immediately refresh and display the current status of the server.

The server utility includes several sections containing various options.

Server Status

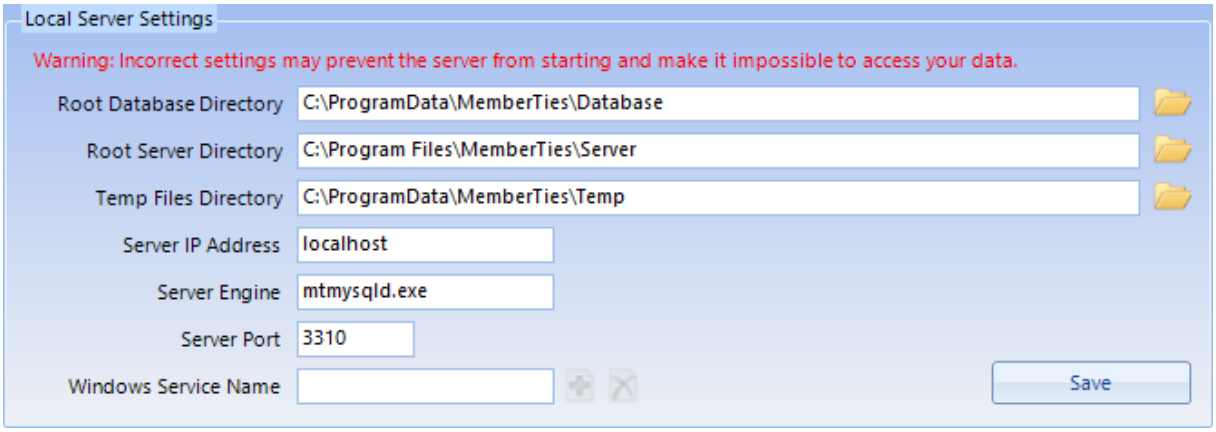
The options in this section control the starting/stopping of the server itself:

- Start Server - reads configuration files and starts/restarts the server. If a Windows service has been installed to control the service, this will attempt to start/restart the service.
- Stop Server - stops (shuts down) the running server and aborts all existing connections. You should be certain nobody is logged in before doing this. If a Windows service has been installed to control the service, this will instruct Windows to stop the service. If you are not running Windows with enough permissions, you may be prompted for elevated rights, or you may need to start the Server Utility as an administrator by right-clicking the program icon and choosing Run as Administrator.
- Refresh Status - refreshes the server status with the current version and uptime values.
- System Info - generates a text file of system information that can be sent to the support team to help diagnose a problem. The file contains information from various MemberTies configuration and log files.

Local Server Settings

The options in this section control the way the server starts and runs on your computer. The word "Local" is important -- if you are connected to a remote computer, these settings do not apply to that machine. Ordinarily you should never need to change any settings here. If you choose to make changes, be very careful and take note of what the current settings are. An incorrect setting will prevent the server from starting and MemberTies will be unable to access any databases.

Never include a trailing backslash (\ ) on any directory entry!



The following fields are available:

- Root Database Directory - the parent directory containing all of your database sub-directories. This defaults to "c:\programdata\MemberTies\database".

- Root Server Directory - the parent directory containing the server files. On a 64 bit system, this defaults to "c:\program files\MemberTies\server". On a 32 bit system, the default is "c:\program files (x86)\MemberTies\server.
- Temp Files Directory - the directory where the server should write temporary files. You must have read/write permissions to this directory or the server will not be able to start. This defaults to "c:\programdata\MemberTies\temp".
- Server IP Address - the address to which the server is bound. This defaults to "localhost."
- Server Engine - the name of the MySQL server engine in use. This defaults to mtmysqld.exe.
- Server Port - the port on which the server is listening for connections. This defaults to 3310.
- Windows Service Name - (optional, but recommended) the name of the service that controls the server. There is no default for this because it is optional. See Running the Server as a Windows Service for details.

22.2 Running as a Windows Service

Normally, when you start MemberTies, it starts the database server if it isn't already running. Thereafter, the server continues to run until it is manually stopped, or the computer is shut down. (The server is a tiny process -- it won't drag down your computer or anything like that).

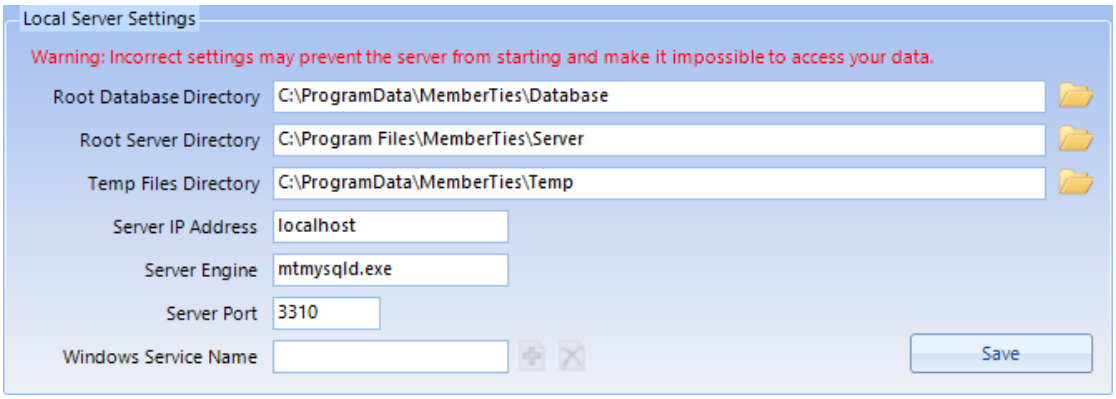
A better way to run the server is as a Windows Service, which means when Windows starts up (whether you log in or not) the service starts and starts the database server. When Windows shuts down, the service gracefully stops the database server as well. It's clean and efficient and is the recommended way to run the server.

Note: This is especially helpful for multi-user systems, because when the server computer starts the database server starts automatically. There is no need to start MemberTies or use the Server Utility to start the server manually.

Creating the Service

Before continuing, be sure everyone is out of MemberTies!

1. Start the Server Utility as a Windows administrator (right-click the icon and choose "Run as Administrator). You will need elevated rights in order to create the Windows Service.
2. In the Local Server Settings section, the Windows Service Name will be blank.



Enter "MemberTiesServer", then click the Add icon, which will enable once you type in the field.

3. If you didn't start the server as an administrator, you will receive a prompt from windows to allow the process to continue.

4. After the install completes, the message log will be similar to the following:

```
Local server is not running.
Server stopped successfully at 05/16/2022 3:55 PM.
Local server is not running.
Installing windows service...
Verifying...
Service installed successfully.
The service can be started/stopped via the Windows control panel, Services applet, or by
running the Server Utility as an administrator.
```

5. The service is now installed and will start the next time Windows starts.

   Note: If you want to use the Server Utility to start the server manually after the windows service has been created, you **must** start the utility as an administrator as described above. Otherwise, you will see an error saying the server must be started via the windows services tool.

6. If you are running the utility as an administrator, go ahead and click Start Server.

```
The service can be started/stopped via the Windows control panel, Services applet, or by
running the Server Utility as an administrator.
Attempting to start windows service "MemberTiesService"...
Service started successfully.
```

7. The log should show the service has been started.

Note: If you run into a situation where the service will not start the computer is restarted and a user logs in to a non-windows-admin account, you may need to change the service startup type from "Automatic" to "Automatic (Delayed Start)". You can do this by modifying the service properties in the Windows control panel.

Removing the Service

The service can be removed at any time if you want to rename it, or want to go back to manual control of the database server.

1. Start the Server Utility as an administrator (right-click the icon and choose Run as Administrator)
2. If the server is currently running, click Stop Server.
3. Click the Delete icon next to the Windows Service Name field. If windows is able to remove the service, the log output will look like this:

```
Attempting to stop "MemberTiesService" service ...
Service stopped successfully.
Removing windows service MemberTiesService...
Verifying...
Service removed successfully.
```

Part XII

To Do List

23 To Do List

23.1 Overview

The To Do list feature simply enables you to keep track of things that need to be done. However, instead of a single general list, you can assign To Do items to individual member or group records, as well as to yourself.

To Do items can be anything you choose. For example, you might create a To Do for yourself entitled, "Print Year End Membership Roster" with a due date of December 31st. Then you just forget about it! When the due date arrives, the item will display on the To Do List when you start MemberTies (this is controlled by the Show To Do List preference). You can even specify how soon before the Due Date the To Do should begin to display. For example, setting the "prompt" to 10 would cause the To Do to display anytime you start MemberTies after December 20th.

To Do items can be marked as Completed at any time, and can be reopened if necessary. A report listing To Do items is also available.

Note: If there are no open (uncompleted) To Do items, the window will not appear at Log In regardless of the Show To Do List preference setting.

This example shows the main To Do list that will appear at Log In, or by clicking the To-Do List button in the Misc section of the Home, Members, or Groups ribbon.

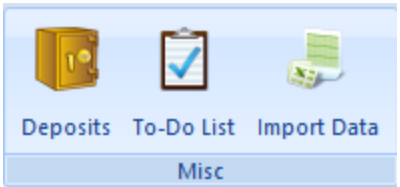
23.2 Working with the To Do List

The To Do List enables you to view or create To Do items for any record in the database, without having to actually open the record. Note that if the To Do item is for a Member or Group record (as opposed to for yourself), you can open the associated Member or Group by choosing the option from the right-click menu.

This window provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

Working with the To Do List

1. The To Do List icon is available on the Home, Members, and Groups ribbons, always in the Misc section.



The Home ribbon To-Do List button

2. From any of the above workspaces, click the To-Do List button.

3. To create a new To Do item, click Add, or select an existing record and choose Edit, Copy, or Delete.

4. The following fields are available:

   - Description - the thing "to do"
   - Type - choose whether the item will be for a Member, a Group, or yourself (User)
   - Assigned To - specifies the record based on the selected Type. i.e., if you choose Member or Group, pick from the list of available members or groups. If you choose User, this field will automatically show your user name.
   - Complete - indicates the item has been completed. Turning this on will automatically set the Completed Date to the current date.
   - Due Date - the date the item will appear on the To Do list that displays at log in (assuming the Prompt days is left as zero)
   - Prompt N days before the Due Date - causes the item to appear on the To Do list that displays at log in the specified number of days before the Due Date
   - Created Date/By - the date and user name of the user who first added the To Do item
   - Completed Date/By - the date and user name of the user who completed the To Do item. Note that the date can be modified if necessary (for example, if you forget to go in and mark an item completed for a couple days after the actual due date)

     Note: The Completed By user will only display once Complete is set to Yes.

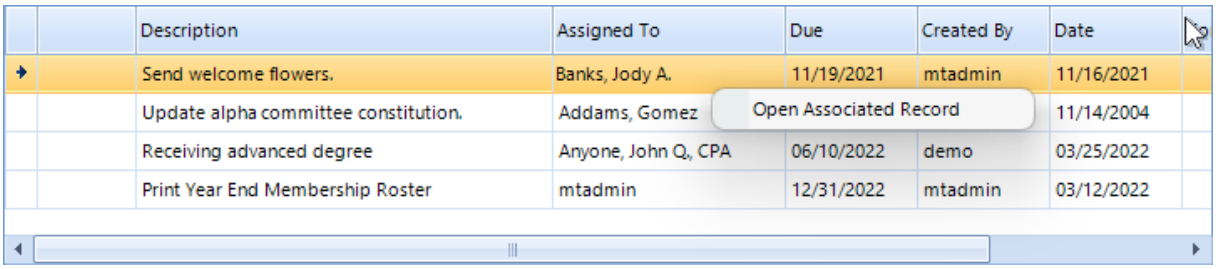
5. Click Save when finished.

   Tip: Once the To Do Item has been completed, you can still change the Completed Date.

Opening the Associated Record

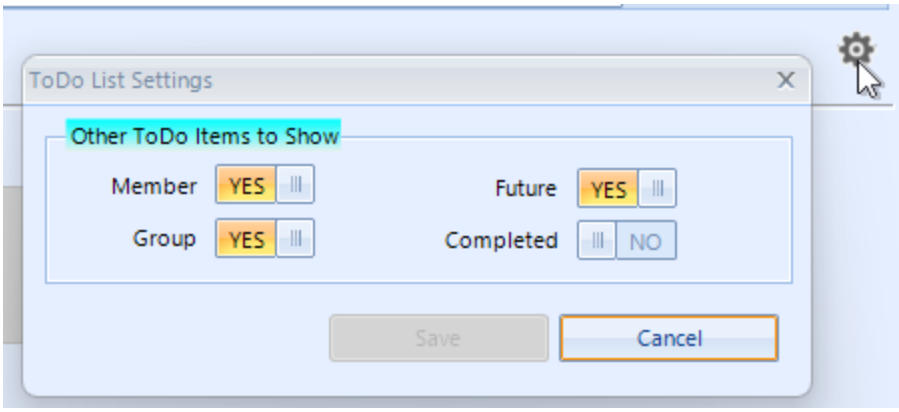
If the To Do item is for a member or group record, you can quickly open it from the list.

Right-click the desired row and choose Open Associated Record from the menu.



Filtering the List

By default this window includes all open Member, Group and User (for yourself) To-Do items. However, the Settings icon enables you to control this more specifically:



The following options are available:

- Member - include Member to-do items
- Group - include Group to-do items
- Future - include items with a Due Date in the future
- Completed - include items already marked complete

Note: This Settings option is not available when the To Do List is opened from within a specific Member or Group record.

Part XI

Troubleshooting

24 Troubleshooting

24.1 Contacting Support

You are free to contact the support group at Myrro International for any reason. While this may seem like a small benefit, remember that you are probably going to be reaching the person or persons who programmed the software and wrote all the help directly -- not a low-level support person hired last week, or worse, a marketing representative in a huge corporation.

Your concerns or comments are always important and you will receive a very prompt response.

Some common reasons to contact support are:

- To suggest an enhancement or new feature (it's really nice to see your own suggestion appear in the newest release!)
- To request to be included in the next beta-testing program
- To report an error in the documentation
- To report a bug (a problem) in the software
- To discuss the registration process
- To discuss funding immediate development of a major new feature

Contacting Info

Current contact information is always on our website at:
https://www.myrro.com/memberties

24.2 Common Questions/Issues

24.2.1 Can I put the database on a network drive?

Yes and no. You should not move just the database. Instead, you should install a separate copy of MemberTies on the networked computer, and place all the databases you use on that computer in the normal location (see the Server and Database Overview for more information).

Once installed, you can use the Server Utility to set up the server to run as a Windows Service. That will ensure that it is always up and running.

Then on each networked machine, create a new database profile that points to the IP Address of the server machine.

24.2.2 Can I use the same license for more than one database?

Yes. You can use a license for as many databases as you wish. However, if the databases are for different organizations, you may want to consider separate licenses for each database so the organization name will be correct for reports.

See Using a License for instructions about applying a license to a database.

24.2.3 Do you accept credit cards for registration payment?

Yes. You can place a credit card order online via the MemberTies website at https://www.myrro.com/memberties.

See Registering for more information.

24.2.4 How do I handle dues payments that apply to more than one person?

If you have related members who make a single dues payment, there are several common practices:

- Create a dues entry on each record and apply a equal proportion of the payment to each.
- Create a dues entry for the full amount on the "main" record (whichever record you consider to be the head-of-household, perhaps), and a $0.00 entry on the other record that includes a comment explaining the entry.
- Create a dues entry for the full amount on both records. This is not recommended because it will throw off the calculations on dues reports.

24.2.5 How do I hide pages of a record?

By default, the member, group, and activity records include multiple pages of data. The member details in particular can include 11 different pages.

Since the data for each page that is loaded must be retrieved and then displayed, turning off pages you don't care about can reduce the time it takes to open a record.

If there are pages you never use, or pages that you use more than others, you can control which pages appear on the window. See Changing Page Order for more details.

24.2.6 How do I select more than one row in a list?

MemberTies supports standard Windows multi-row selection using the CTRL and/or SHIFT keys and the mouse.

Please see Selecting Rows in Lists for details.

24.2.7 How do I sort on a combined user report field?

When creating a user defined report, label, view, etc., you typically will want to use one of the combined smart fields that automatically display the full name, or "last name, first name", or that combines the city, state, and ZIP code, etc.

That's great for display, but what if you want to sort on just one of the fields that are "part of" the combined field you selected? How do you do it?

The answer is simple: use a hidden field!

For example, say you are using the smart field "City/State" for one line of a mailing label report, but you want to sort the labels by State. Since the state isn't the first thing displayed in the field, you can't just sort on this field because that is effectively sorting by City.

To solve the problem, do the following after adding your normal fields:

1. Add the State field somewhere on the label.
2. Set that field as hidden.
3. Set that field as the 1st sort

Now you have an invisible field that is only used for sorting, leaving your display fields unchanged.

See User Defined Reports for details.

24.2.8 How do I track a Committee?

Group records work quite well for tracking committees and other "sub-groups" of your membership.

Group records were originally intended for tracking other similar organizations to which your members might belong. For example, if you run the Texas Widget Chapter, but some of your members also belong to the Louisiana Widget Chapter, you could create a group record for Louisiana Widget Chapter and relate the appropriate members to that.

Since you can assign members to group records, you can use them to group any number of members without the need for custom fields or categories/items. If you need to track a group of some kind where you just need to know which members are a part of it, you can create a

Group record for the group and assign members to it as necessary. You can even assign members to groups directly from the Membership List.

Once assigned, you can easily query for members of a particular group by using the group as part of the search on the Membership List, or most membership reports.

Of course, if you need to track things like attendance and expenses for the committee, then an Activity record makes more sense; but, in many cases a group record will do just fine.

24.2.9 Our licensed organization name changed!

If you change your organization name, contact support for a new license file keyed to the new name. There is not normally a charge for this, but be aware that your current license will cease to function after the new one is created.

24.2.10 The Member ID Column Sorts Incorrectly

See About Member IDs for additional information.

24.2.11 When should I use a Custom Field vs an Item?

To decide whether to track a piece of information in a custom field (on the Custom page) or in an Item (on the Assigned Items page) of a member or group record, you have to ask: "Can a record be assigned this kind of data more than once?"

If the answer is yes, then you don't want to use a custom field, because a custom field only holds one entry. Thus, the second time a member is assigned this "thing", you would have to use another field for it, when it's really just an extension of the first.

For example, say you need to track the member's Driver License number. Typically, a person will only have one of those, so that's a good candidate for a custom field (or possibly for the Member ID).

But if you want to track something like, "Donated Auction Items", "Offices Held", or "Degrees Earned", a system of Categories and Items is much better.

Take the example of Degrees Earned. If you create a category called "Degrees Earned", you can create items under it for "PhD", "Doctorate", "Masters", "BS", "BA", "MBA", etc.

Then, if a person earns her bachelor's, you can go to the Items tab on her record and create a record for "BS" and even set the date and a comment (maybe the university name). Then when she gets her Masters in business administration, you can go back to her record, go to the items tab, and enter another record for "MBA" with the date and comment.

Since this person is going on to law school, you know you'll be back to add another item. If you had used Custom fields it would have been much more difficult.

Further, if you want to run a report and show everyone who has earned a masters degree, you can just use criteria like:

```
Assigned Item = "MBA"
```

24.2.12 Where do I find information about program updates?

Our website shows the current program version on the Download pages. See https://www.myrro.com/memberties.

Registered users are also automatically added to a mailing list that provides a notification of major new updates and releases.

You can also set the Check for Updates Login preference to have the system check periodically.

24.2.13 Why do some members appear twice?

This situation normally only applies to MemberTies Professional.

The most common reason a membership record appears more than once on the Membership List is multiple addresses. When you add more than one address on a membership record, and have address fields showing as part of the Membership List view, the system will automatically use only the Active address to get the address data.

However, if you run a Search, there is a Current Address field that can be used to tell the system whether that's what you want to do. By default, the system assumes you only want the active address, but you could set it the other way, causing the member to appear once for each additional address they have. See Address Overview for details.

24.2.14 Why is the date format wrong?

The date is displayed according to the format specified in the Regional Settings for your computer.

The way to check varies with different versions of windows, but essentially:

1. Click the Start button and type "Regional Settings"
2. Follow that and look for the Short Date format or style.

Part XXI

Users and Passwords

25 Users and Passwords

25.1 Overview

Every database has one or more users that are allowed to log in. The Login window takes the user name and password provided, and checks it against the selected database to see if that user is allowed to log in at all. If the database accepts the settings, everything from that point forward is controlled by the user's Security Group settings.

IMPORTANT: If you lose your password, there is no way to retrieve it. Passwords are encrypted, and there is no way for anyone (not even Myrro International) to determine what password you used. Make the password something you can remember, and keep it somewhere safe! In the event that you do lose a password, the mtadmin user can log in and give you a new password. If the mtadmin password is also lost, you will need our help to reset it.

See Working with Users for details about creating and managing user accounts.

Users

MemberTies has two types of users:

- **Administrator User**

  The administrator user is a special user known to the system as "mtadmin". This is the most powerful user, and it is created automatically by the system when you create a new database. **By default, the password for this user on all new or converted databases is simply, "password."** You should change the password to something more secure as soon as possible. This user has rights to do special things to the database, such as to create or modify other users, display currently active users (and stop their sessions if desired) and more.

  This is the only user with the authority to add new users to the system. This helps prevent someone from simply creating a new name and using your database. It is also worth mentioning that you should not leave user names assigned to a database if they aren't going to be used. Leaving active user accounts in the system leaves a security hole in your system, allowing somebody to access data using a name and password you thought was out of service. When users leave your organization, you should have the administrator inactivate the account.

  The administrator user is also able to:

  - Update Security Groups and assign them to users
  - Change passwords for other users
  - Activate and Deactivate other users
  - Display all currently active users

Though this is a powerful account, it can be used for normal day to day activities, however you may want to create another user in your own name to use for normal work. This is because if the day comes that a new person takes over as the administrator, things they do as mtadmin will look exactly like things you did as mtadmin because that user name doesn't change. But if the user changes from Tisha to Maeve, the difference will be clear.

- **Normal User**

  A "normal" user is someone who just uses MemberTies to work with the data, who doesn't need to do any of the things the administrator can do. You will normally want to log in as a non-administrative user and reserve the administrator accounts for those times when you actually need to do something that only the administrator can do.

Passwords

The MemberTies uses passwords to help ensure that all of the confidential personal information contained within your database is safe from casual snoopers. It isn't foolproof, but it goes a long way toward preventing the pool boy from finding out the names and addresses of all your single female members. The more secure a password you create, and the better you protect it, the more secure your data will be.

Note: Passwords are case-sensitive! The word "password" is not the same as the word "paSSwoRD" (and of course, neither of these are very secure choices for a password).

25.2 Administrator User (mtadmin)

MemberTies includes one built-in administrator user called "mtadmin" with a default password of "password". We strongly recommend changing this password to something more secure as soon as possible.

The administrator user functions just like a normal user, except it also has the ability to:

- Create new users
- Manage existing users, changing passwords and other details
- Create and manage security groups and roles
- Disconnect active users remotely

The administrator user account cannot be deleted, and it is immune to being locked out due to failed password attempts.

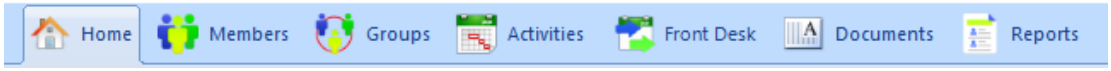
25.3 Working with Users

Only the administrator user (mtadmin) can modify existing users' passwords, active status, or Security Group settings.

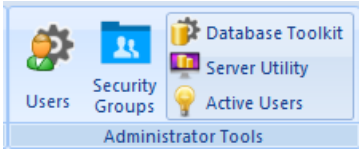
The Users window provides a standard dual view of data, showing the list of existing records on the top, and the details below. See Editing Records for more information.

Working with Users

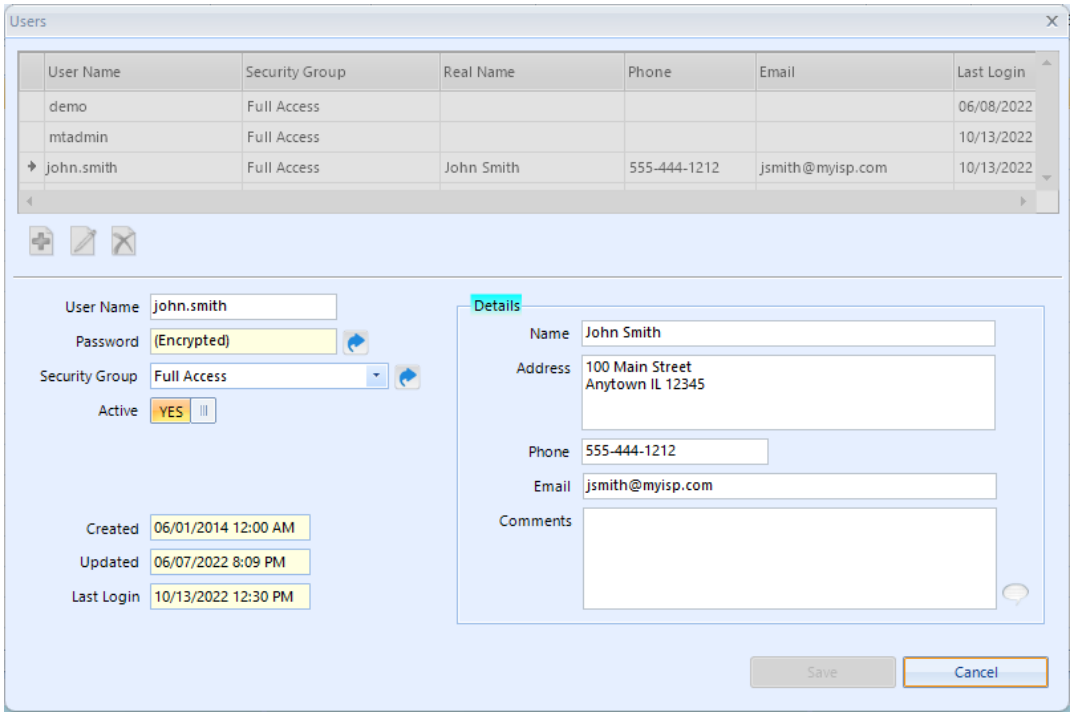
1. Choose the Home workspace by clicking the Home tab above the ribbon.



2. In the Administrator Tools section of the ribbon, click Maintain Users.



3. The Users window will open.



4. To create a new user, click Add, or select an existing record and click Edit or Delete.

5. The following fields are available:

   - User Name - the user name that will be used on the Login window
   - Password - the password for the user. Once saved it will shows "Encrypted". Click the Icon to the right of the password field to set the password.
   - Security Group - the security group to which the user belongs

- Active - controls whether the account can be used to log in. If a user leaves the organization, turning this off will preserve the record but prevent it from use.
- Created - the date the record was created
- Updated - the date the record was last updated
- Last Login - the last date the user logged in to the system
- Name - the user's real name
- Address - the user's physical address
- Phone - the user's contact phone
- Email - the user's personal email address. If the user requests a password reset on the Login window, the new password will be sent to this address.
- Comments - general comments about the user

6. When finished, click Save.

25.4 Passwords

Anyone logged in to MemberTies can change their own password at will, but only the administrator (mtadmin can change the password of other users. This procedure covers both of these scenarios.

Note: You should always choose a password that is difficult to guess (i.e., don't use your birthday, your address, your pet's name, or "password."). As a rule, membership databases contain a lot of confidential information -- a good password is the first step to preventing a loss of information.

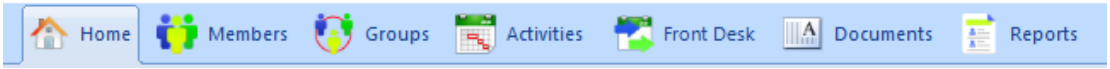
Passwords are CAsE SensiTive! The word "mypassword" is totally different from "mYpassWord" (and still not a very secure password, by the way).

By default, the password for the most powerful account in the system (mtadmin) is simply, "password." You should login as this user as soon as possible and change the password to something more secure.

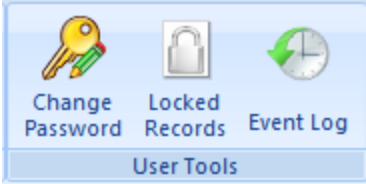
IMPORTANT: If you lose your password, there is no way to retrieve it. Passwords are encrypted, and there is no way for anyone (not even Myrro International) to determine what password you used. Make the password something you can remember, and keep it somewhere safe! In the event that you do lose a password, the mtadmin user can log in and give you a new password. If the mtadmin password is also lost, you will need our help to reset it.

Changing Your Own Password

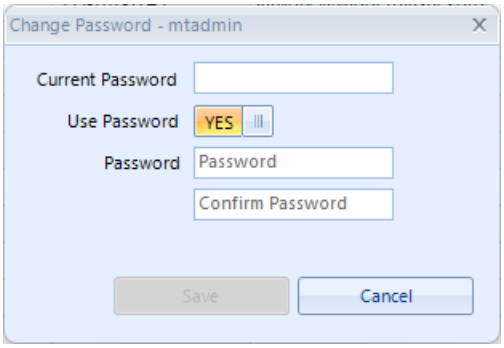
1. Choose the Home workspace by clicking the Home tab above the ribbon.



2. In the User Tools section of the ribbon, click Change Password.



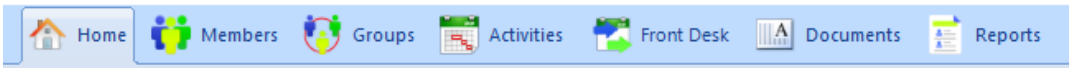
3. The Change Password window will open.



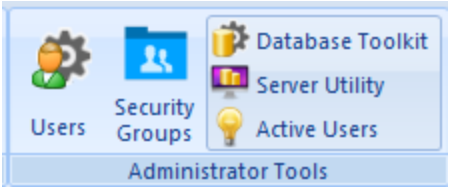
4. Enter your existing password in the Current Password field.
5. If you do not want to use a password, turn off the Use Password switch, otherwise, enter the new password in both the Password and Confirm Password fields.
6. Click Save. The new password (or lack thereof) will be enforced with the next log in.

Changing Another User's Password (administrator only)

1. Choose the Home workspace by clicking the Home tab above the ribbon.



2. In the Administrator Tools section of the ribbon, click Maintain Users



3. Select the user in question, and click Edit.
4. Click the icon next to the password field and set a new password.
5. Click Save.

Part XV

Views (Custom Lists)

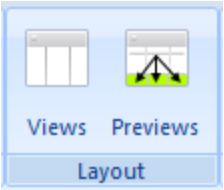
26 Views (Custom Lists)

26.1 Overview

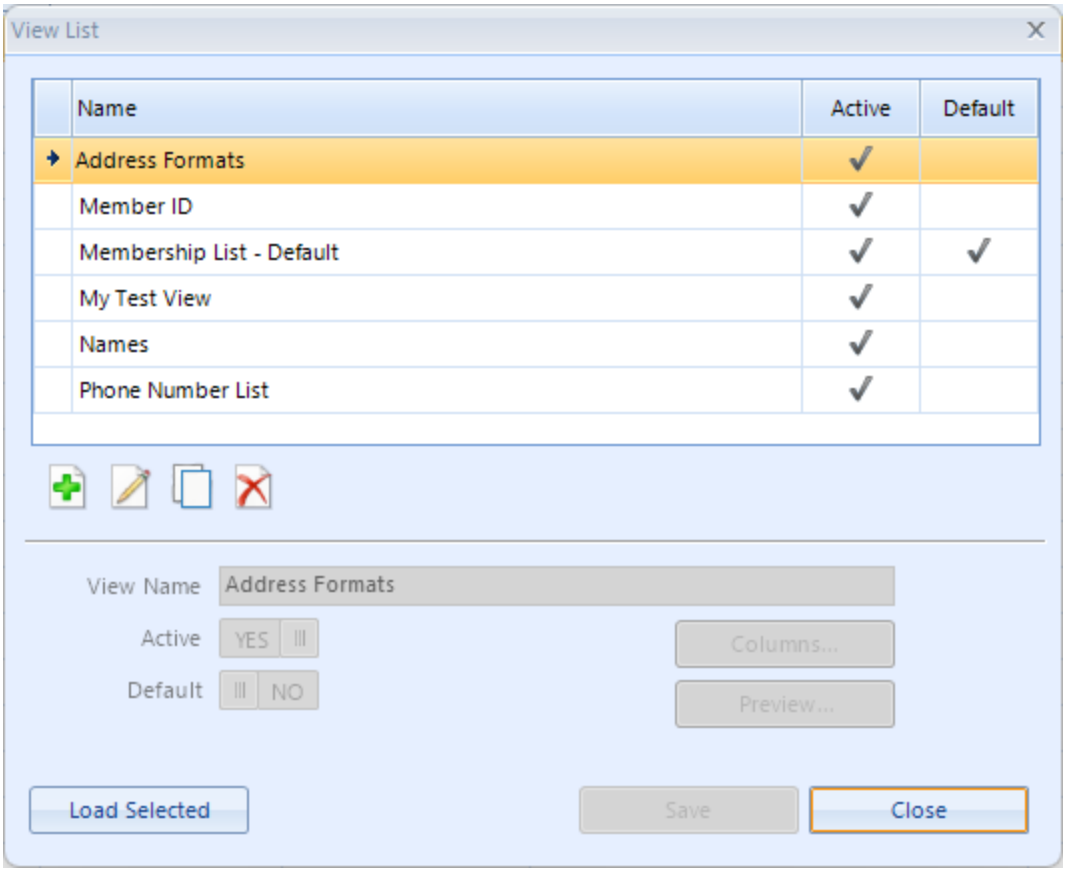
A "View" is simply a customized layout of either the Activity, Membership, or Group List. It includes one or more columns of data representing the fields you want to see.

With MemberTies Professional, you can create your own views. This powerful feature puts the decision making totally in your hands, allowing you to choose whatever fields you want. You have the ability to place them in any order, set both a primary and secondary sort order (i.e., by City, then by Last Name), and even change the text displayed for the column headings.

Views are managed by choosing the Views button in the Layout section of the appropriate workspace ribbon.



The View List shows all currently defined views, including the default system view (with "-Default" in the name). The system view can be renamed, deactivated or removed as the default, but the view itself cannot be deleted and its columns cannot be not modified.



MemberTies ships with a default view of each list, designed to display the most common information about a record. The default views do not include all available fields, because displaying more fields means retrieving more data from the database for each record, and retrieving data takes time. Of course, you know your computer better than we do, so there are no such restrictions on views you create yourself.

The Views you define will work just like the standard lists. Clicking a column heading will still sort the whole list, menu options will remain the same, and you can still open and add records normally. Even if you create a view that only shows the City (which would make it very hard to distinguish one record from another), the entire record will still appear when you select and open one of the records.

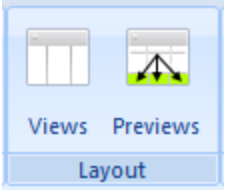
26.2 Working with Views

Views you create can be modified at any time. If a view is no longer needed, even temporarily, you can change its Active status to hide it until it is needed again.

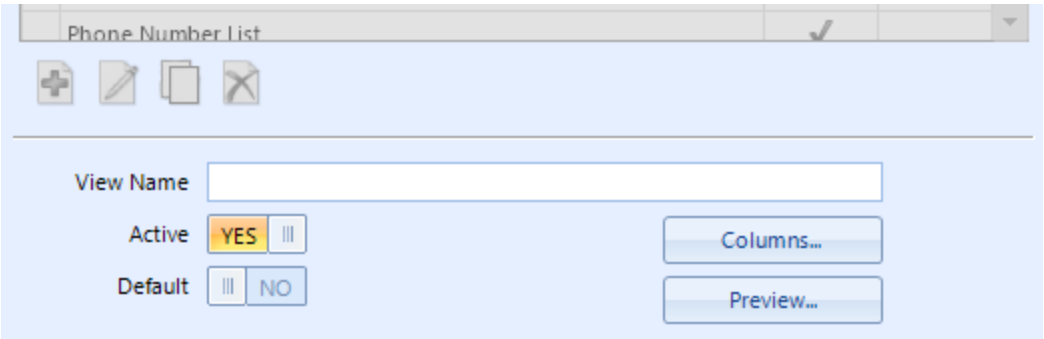
Adding a View

1. Choose the Members, Groups, or Activities tab from the ribbon bar.

2. Click the Views button in the Layout section of the ribbon.



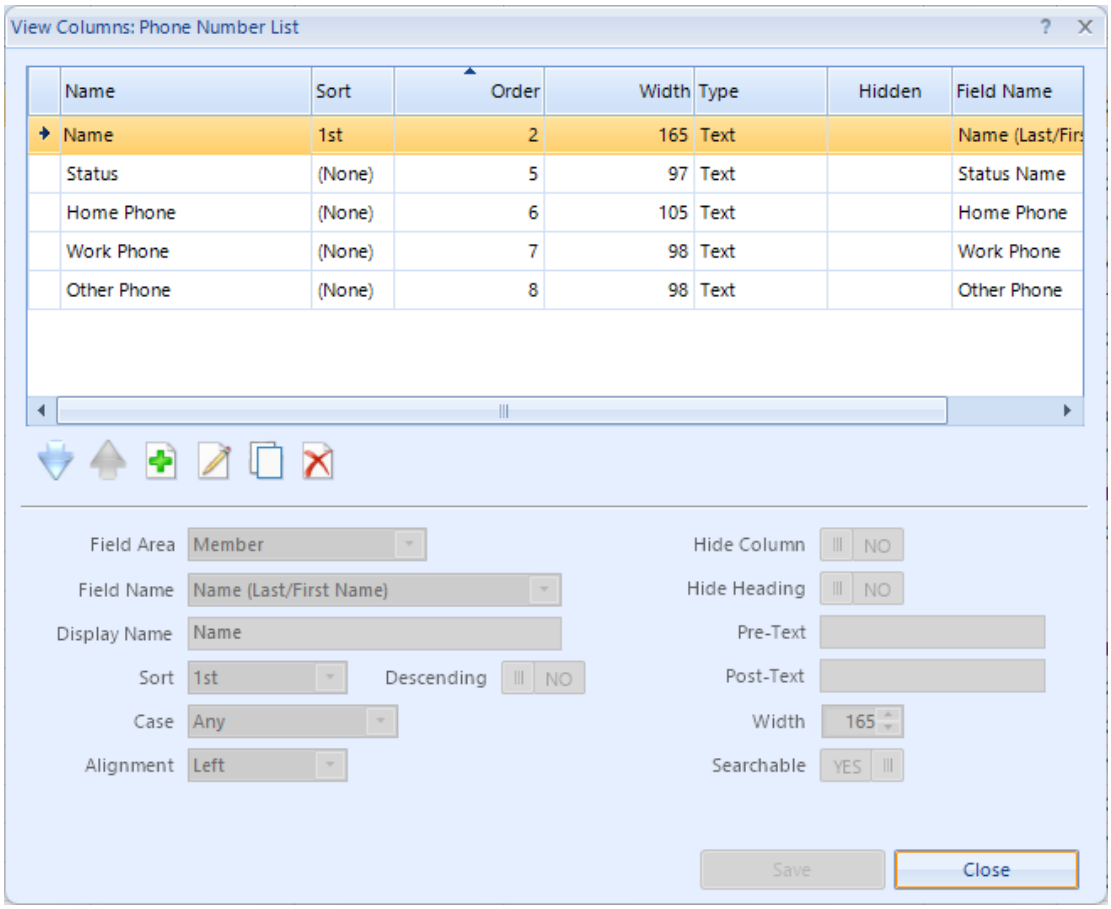
3. The View List window will display a list of all active views. Click Add to create a view, or Copy to duplicate an existing view. This will enable the editing area below the list.



4. The following fields are available:

   - View Name - a short but descriptive name for the view, i.e., "Phone List", "List for Mailing Service", etc.
   - Active - indicates whether the view will be available to use
   - Default - one view can be marked as the Default, and that view will load automatically when the list is opened

5. After naming the view, click the Columns button.



6. The following fields are available:

- Field Area - the general data area of the field. This selection controls what fields are available in the Field Name list.

  Note: This field cannot be changed after saving.

- Field Name - the specific field to show. In our example we've selected a smart field that shows the name in Last, First order.

  Note: This field cannot be changed after saving.

- Display Name - the name as it should appear in the column heading. In our example, we changed the original "Name (Last/First Name)" value to, "Member Name".

- Sort - if the view should be sorted by the contents of the field, choose the sort here. You can specify up to 5 levels of sort, i.e., to sort by Name and then by Postal Code, you would set the name as the 1st sort, and the Postal Code as the 2nd sort. A field does not have to be visible to be sortable (see below).

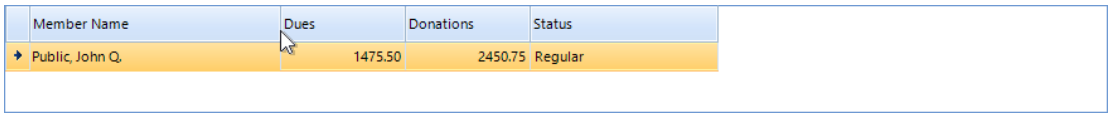
- Case - enables you to force text field contents to be upper or lowercase. The default is "Any", meaning, leave it as-entered.
- Alignment - enables you to force the contents to be left, center, or right-aligned within the column The default is Left aligned.
- Hide Column - select this option to hide the entire column. This is helpful if you want to sort by this field, but don't want to actually see it. For example, suppose you use the combined First Name/Last Name smart field for display, but want to sort on the last name only. Since the combined field starts with the First Name you can't sort it or you would be sorting by first name. Instead, add the Last Name field as well, hide it, and set it as the 1st sort to solve the problem.
- Hide Heading - select this option if you want to see the field, but want the heading left blank.
- Pre-Text - text to be displayed to the left of the data for the field (you can leave leading or trailing spaces in this field).

  Tip: When defining a column on a user-report, you can force a blank line to appear above a particular line by entering "<br>" (without the quotes) in the pre-text field. (This will not work for Views.)

  Technical Note: The "<br>" is not actually HTML code, we just use that for simplicity.
- Post-Text - text to be displayed to the right of the data for this field (you can leave leading or trailing spaces in this field).

  Note: Pre and Post-Text values are intended to be used however you choose. One possibility is to use Pre-Text in place of the column heading. In other words, if the column's "Hide Heading" option is turned on, no heading will appear. But you could use Pre-Text to show "Tel:" in front of each phone number (i.e., displaying as, "Tel: 123-456-7890")
- Width - the pixel width of the column. This value is set to a default based on the selected Field, and is normally modified by resizing columns in the Preview window. But the field is displayed here for convenience, if you know that you like 100 as a width for certain types of data and want to set it manually. It also allows for small adjustments when necessary.
- Searchable - indicates whether data in this field will be included when using the search box at the top of the applicable list (Membership list, Group List, etc). This defaults based on whether the selected field is a Text field or not, but it can be overridden as you wish.

7. Create and save all columns as needed, then click Close to close the window and return to the View List.
8. Click Preview



Member Name	Dues	Donations	Status
Public, John Q.	1475.50	2450.75	Regular

9. The preview window enables you to visually adjust column widths to best fit your data. You can resize any column by dragging the border between heading cells.

   Note: preview data is *fake data*. It does not pull data from the database. Columns are populated with representative data of average length. You will know your data best and can resize the columns as appropriate.

10. When you're finished, click Save to return to the View List

11. Click Save to save the finished View.

12. If you would like to see your new View in action, click the Load Selected button and the view will be applied to the list.

Tip: You can only rename an existing view via the Maintain Views window. To do so, select the view in the list, then right-click the view and choose Rename from the popup menu.

Changing a View

You can edit an existing view from the View list. Any part of the view can be modified, though if you want to change a field to a different field, you will have to delete the unwanted field and add the new one. Changes will take effect when the view is saved and loaded.

Deleting a View

You can delete an existing view from the View List. If the view is currently in use (by yourself or any other user) it will remain active until the list displaying it is closed. When that list is reopened it will use the new default view if one is available, or will revert to the system default view.

Things to Consider when choosing fields:

When choosing fields, it is very important to consider the data type of the view you are creating. Even though you can choose almost any activity, group, or membership field, they can change the behavior of the view. For example, if the view is for Membership data, adding activity fields will convert it into an "activity attendance" style of view, where only members who have attended an activity will display. Likewise, adding dues posting fields to a membership view will turn it into a dues postings view, and only members who have dues postings will be considered.

List Type	Type of Field Added	Restricts the View to:
Members	Member	No Restriction

	Activity	Members who have attended at least one activity.
	Posting (Dues)	Members who have at least one dues posting.
	Posting (Donations)	Members who have at least one donation posting.
	Group	Members who are assigned to at least one group.
Activities	Activity	No Restriction
	Membership	Activities with at least one attendee
	Posting (activity)	Activities with at least one posting (attendee or non-attendee) unless a membership field is also used, in which case the postings must be tied to an attendee.
	Custom Field	Activities with at least one attendee (if a member custom field) or at least one attendee who is a member belonging of a group (if a group custom field)
Groups	Group	No Restriction
	Membership	Groups with at least one assigned member.

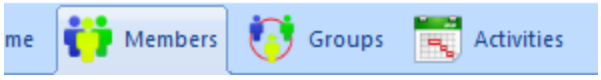
Selecting fields outside the norm for the list type may also produce seemingly duplicate records. For example, if you add the Activity Name to a Membership List view, the view must find only members who have attended an activity, and if a member attended three different activities, they will appear in the results three times.

26.3 Working With Previews

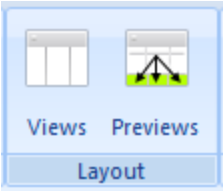
With MemberTies Professional, you can define one, two, or three data previews each for the membership list, group list, and activity list. A preview is a quick synopsis of additional information about the currently selected list record. Different lists have different preview data available. This example shows two of the available previews for the Group List.

Working with Previews

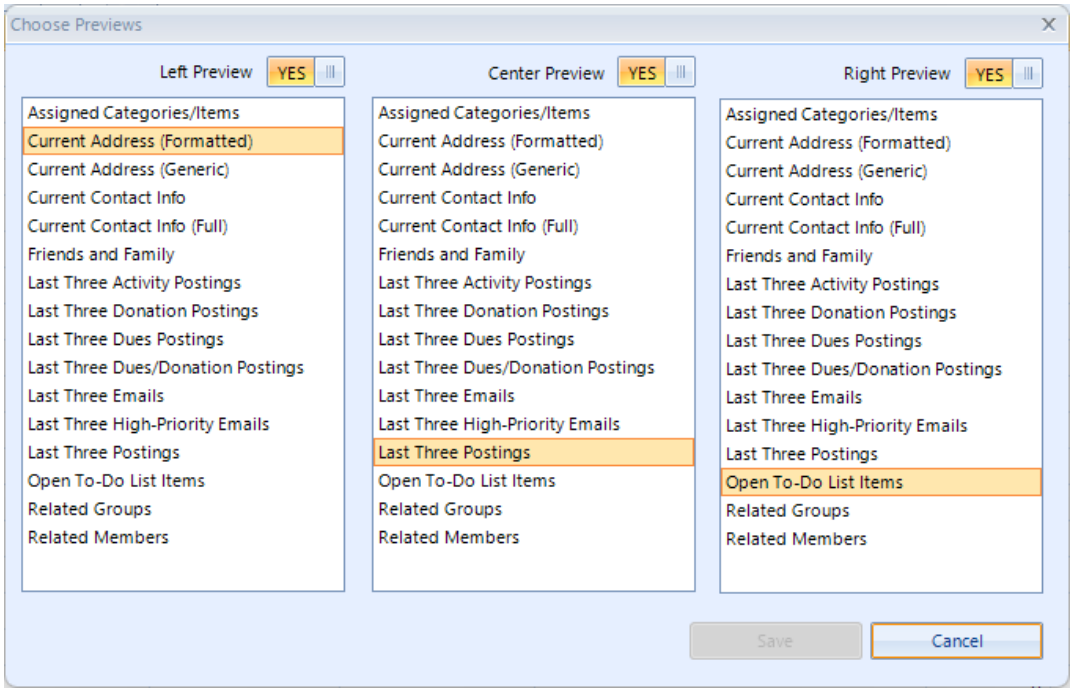
1. Choose the Members, Groups, or Activities tab from the ribbon bar.



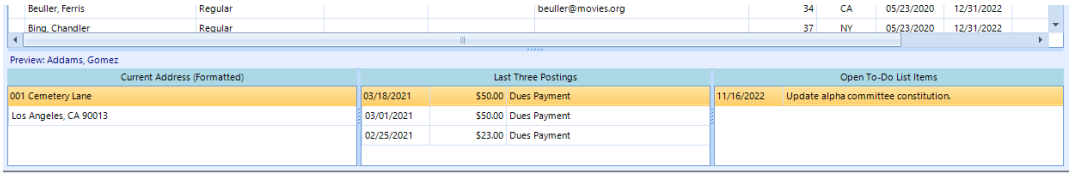
2. Click the Previews button in the Layout section of the ribbon.



3. The Choose Previews window contents will vary based on the selected workspace. This example is for Members:



4. Each section can be activated independently, and once activated you can choose the preview to display. In this example we're using all three previews, which are then displayed in the area below the Membership List for the selected record:



26.4 Exporting Data

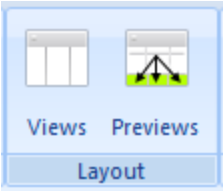
The easiest way to export data from MemberTies is to use Views. You can create a view that contains exactly the fields you want to export, and then save that data straight from the appropriate list.

To Export Data from a View

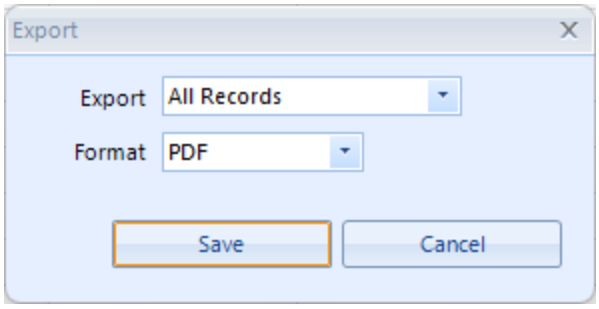
1. Open the list and View of your choice. For instructions on creating or applying Views, see Working with Views.

2. Search for the data that you want to export. For example, to export members living in "Anytown, USA", enter the appropriate search criteria and retrieve those records.

3. In the List section of the ribbon, choose Export.



4. When the Export window opens, choose the data to export and the format.

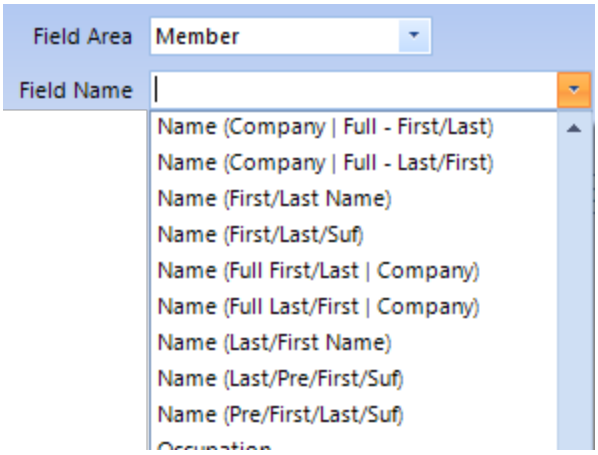


5. Click Save, and choose the file and location.

26.5 Smart Fields

Certain fields available for user defined reports, views, labels, etc., do more than just select a specific piece of data -- they combine multiple pieces of data, or even make a decision about which data to display based on what is available. These fields are known as "Smart Fields," and are used to simplify the display of data that is typically combined, like the components of a name, date, or address.

Smart Fields appear in various field listings. This is an example of some of the smart name fields available for member data:



Name Fields

For general name formatting, use:

Name (First/Last Name)
i.e., "John A. Smith"

Name (First/Last/Suf)
i.e., "John A. Smith, Jr."

Name (Last/First Name)
i.e., "Smith, John A."

Name (Last/Pre/First/Suf)
i.e., "Smith, Mr. John A., Jr."

Name (Pre/First/Last/Suf)
i.e., "Mr. John A. Smith, Jr."

The following use the Company Name if it is available, otherwise the specified name:

Name (Company | Full - First/Last)
This field will automatically display the Company Name if it is available. If no company name is found, the complete name will be shown using the "Name (Pre/First/Last/Suf)" format described above.

Name (Company | Full - Last/First)
This field will automatically display the Company Name if it is available. If no company name is found, the complete name will be shown using the "Name (Last/Pre/First/Suf)" format described above.

The following use the Company Name only when there is no first/last name:

Name (Full First/Last | Company)
This field will automatically display the full name using the "Name (Pre/First/Last/Suf)" format described above unless both the first name and last name fields are blank. If both names are blank, the company name is used instead.

Name (Full Last/First | Company)
This field will automatically display the full name using the "Name (Last/Pre/First/Suf)" format described above unless both the first name and last name fields are blank. If both names are blank, the company name is used instead.

Sponsor Name (First/Last Name)
Similar to the Name smart field above, but for an activity attendee sponsor

Sponsor Name (Last/First Name)
Similar to the Name smart field above, but for an activity attendee sponsor

Sponsor Name (Last/Pre/First/Suf)
Similar to the Name smart field above, but for an activity attendee sponsor

Sponsor Name(Pre/First/Last/Suf)
Similar to the Name smart field above, but for an activity attendee sponsor

Note: All member records also have an available "Alt Name" field. This field is designed to be shown on mailing labels in place of the normal member name. This field value will automatically be used instead of the "Name" value on user-defined mailing label or post card reports, just like the standard system-defined mailing label report.

Address Fields

City/County/ZIP Code
Combines the specified address components

City/State
Combines the specified address components

City/State/ZIP Code
Combines the specified address components

City/State|County/ZIP Code
Combines the specified address components but uses the County if there is no State

Country/ZIP Code
Combines the specified address components

County/ZIP Code
Combines the specified address components

ZIP Code/City

Combines the specified address components

Balance Fields

Activity Balance
The sum of all income/expense postings for the activity

Donation Balance
The sum of all donation postings for the member.

Dues Balance
The sum of all dues postings for the member.

Date Fields

***Date Field* (Day)**
The Day portion of the date field (i.e., Birthdate, Start Date, etc)

***Date Field* (Month)**
The Month portion of the date field (i.e., Birthdate, Start Date, etc)

***Date Field* (Year)**
The Year portion of the date field (i.e., Birthdate, Start Date, etc)

Birth Day/Month
The birth day and month in DD/MM order.

Birth Month/Day
The birth month and day in MM/DD order.

Today (long format)
The current date formatted using the full day of the week, month, day, and year.
i.e., Thursday, January 30, 2021 or Thursday, 30 January 2021 based on regional settings.

Today (medium format)
The current date formatted using the full day of the month, day, and year.
i.e., January 30, 2021 or 30 January 2021 based on regional settings.

Today (short format)
The current date formatted with only numbers.
i.e., 01/30/2021 or 30/01/2021 based on regional settings.

Today/Now
The current short format date and time

Count Fields

Count of Associations
The number of other member records associated to the member.

Count of Attendance
The number of activities to which the member is a valid attendee.

Count of Friends/Family
The number of friends/family members associated to the member.

Count of Members
The number of members in the group.

Headcount
The current number of activity attendees

Miscellaneous Fields

Absent from Activity
Indicates whether the current member is absent from the specified activity.

Age
The calculated Age if all birth date components exist.

Associated Member List
A simple list of the names of all member records associated to the member.

Family Member List
A simple list of all friend/family members for the member

Freeform Text
These fields enable you to enter plain text (via field properties, where Pre/Post Text is normally displayed). No database information is used for these fields. A common use for a freeform field is a series of underscores, to form a signature line on a member list.

Part XV

Software Updates and Licensing

27 Software Updates and Licensing

27.1 Installing Updates

27.1.1 How Updates Work

MemberTies is always being updated. We tend to keep a monthly or quarterly release cycle, depending on need. There are several things that can trigger a new release:

- Errors/Bugs -- If someone encounters an error and reports it, we will find the problem as soon as possible and release a fix. If the issue is critical (such is something that could impact your data) we will release an immediate update. If the issue is not critical or only occurs in certain situations, the fix will go into the next update package.
- Suggestions -- If you are in the software and think, "if only it worked this way instead," let us know. Explain what you're doing and how it could be improved, and we'll log the suggestion for consideration. If the change won't negatively impact other users, it is very likely that we will implement it.
- Feature Requests -- Many features in the software are the direct result of users' requests. Nobody knows your needs better than you do, so if you think of something that would be really useful, let us know. If we think it is viable and would benefit others, we'll build it into the program and it will become part of an update.

Checking for Updates

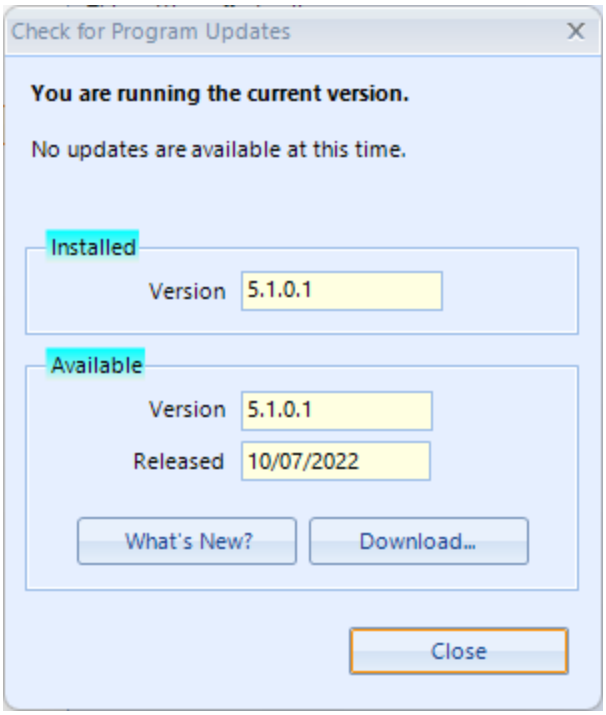
The "Check for Updates" Login preference controls how often the system checks to see if a new version is available, and whether updates can be installed automatically. If an update is found to be available, a window will open and display the available update so you can choose whether to download it.

27.1.2 Checking for Updates

The Check for Updates window enables you to see what version is available for download compared to the version you currently have installed.

You can access this window either from the Program Info window, or from the Check for Updates Login preference.

Note: You can also have the system install updates automatically.



The following options are available:

- What's New? - downloads and opens the list of program changes (aka, Release Notes) for the version that is available.
- Download - downloads the available version (it will download the full install or the patch, based on your need) and then offers to close MemberTies and start the installation.

27.1.3 Automatic Updates

If you have MemberTies is installed on multiple computers, upgrading everyone can be a little challenging. The "Update Automatically" Login preference can help simplify this process.

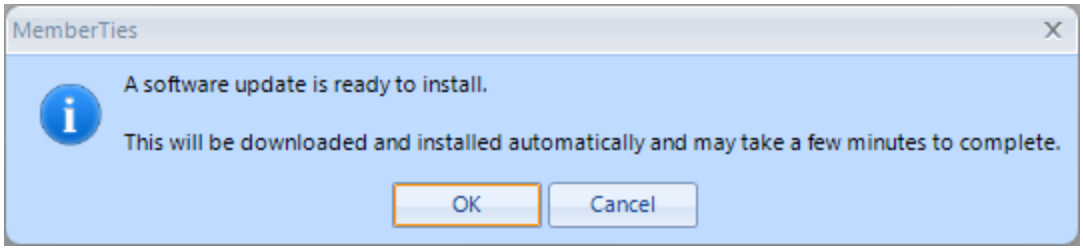
Automatic updates are primarily intended to help multi-user installations. With any upgrade, it is important to upgrade the main "server" computer first, before upgrading any user computer that connects to it. This is because the upgrade may include a change to the database, and that needs to be done first.

How to use Automatic Updates

- Log in as the mtadmin user.
- Go to the "Check for Updates" Login preference
  - Days: 1
  - Automatic Install: Yes

Now when a user logs in, the system will check to see if an update is available. If an update is found, the system will check to see if the database version is compatible with the update.

If compatible, the user is notified that an update is ready and must be installed.



- If the user clicks OK, MemberTies exits, downloads the installation file, installs it, and then starts MemberTies again.
- If the user clicks Cancel, MemberTies exits *unless* the user is the mtadmin user. This is intended to require the upgrade for a normal user, because running a version that is different than the server version can cause program errors. However, if something goes wrong with the upgrade and it cannot complete for some reason, there needs to be a way to get into the program and turn off the auto-update preference. This allows the administrator to do that.

Since the system will not mention an available update unless the database is compatible, the administrator of the system can control when major updates are installed. When ready to update the system, simply install the new version on the server. This will update the database version, and now each user that logs in will be prompted to install the update as well since the database will be compatible.

An automatic update runs outside of MemberTies. A small command window will appear and show the download progress, then the installer will launch and proceed with minimal user interaction. Windows may still show an unavoidable security UAC prompt asking the user to allow the install, then the update should complete on its own.

27.1.4 How to do a Full Reinstall

Sometimes when software has been installed for many years, a new upgrade just refuses to install correctly. Usually there are "leftovers" from years of installations and changes that get in the way somehow, and the best solution is to simply uninstall the software completely and install fresh. That ensures that you have a shiny new, clean installation, ready to go.

The key to doing this is to have a database backup ready to restore after the new install is complete. Always make a backup before installing any new version!

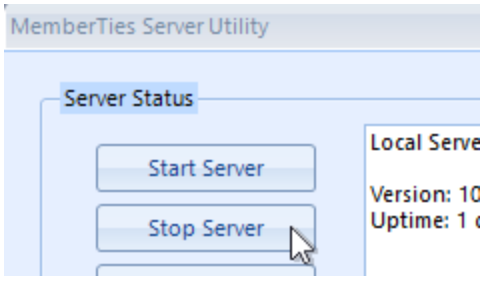
Note: If you have a hosted database, then you don't have to worry about a backup, because you won't need to restore a database -- it will still be out there waiting for you. All you will need to do is recreate your database profile after reinstalling.

The built in "Remote Programs" tool in the Windows Control Panel will do most of the work, but you can help a lot by ensuring that the server has stopped before you try to uninstall.

To do a Full Reinstall

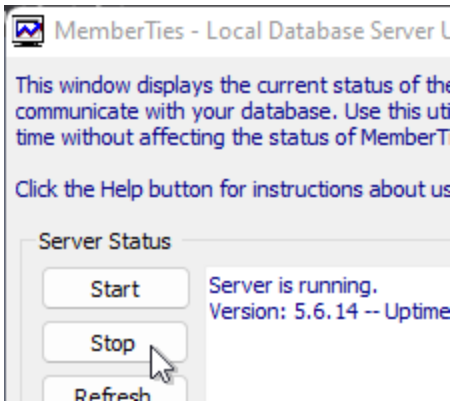
1. Make sure you have a good database backup and know where it is.

2. Stop the server if it is running, by using the MemberTies Server Utility.



On 5.x versions...

The look and name has changed over the years. The older name was "Local Database Server Utility" as shown below.



On older versions...

3. If you can't stop the server, or can't find the Server Utility tool, try restarting your computer. That should ensure that everything has stopped.

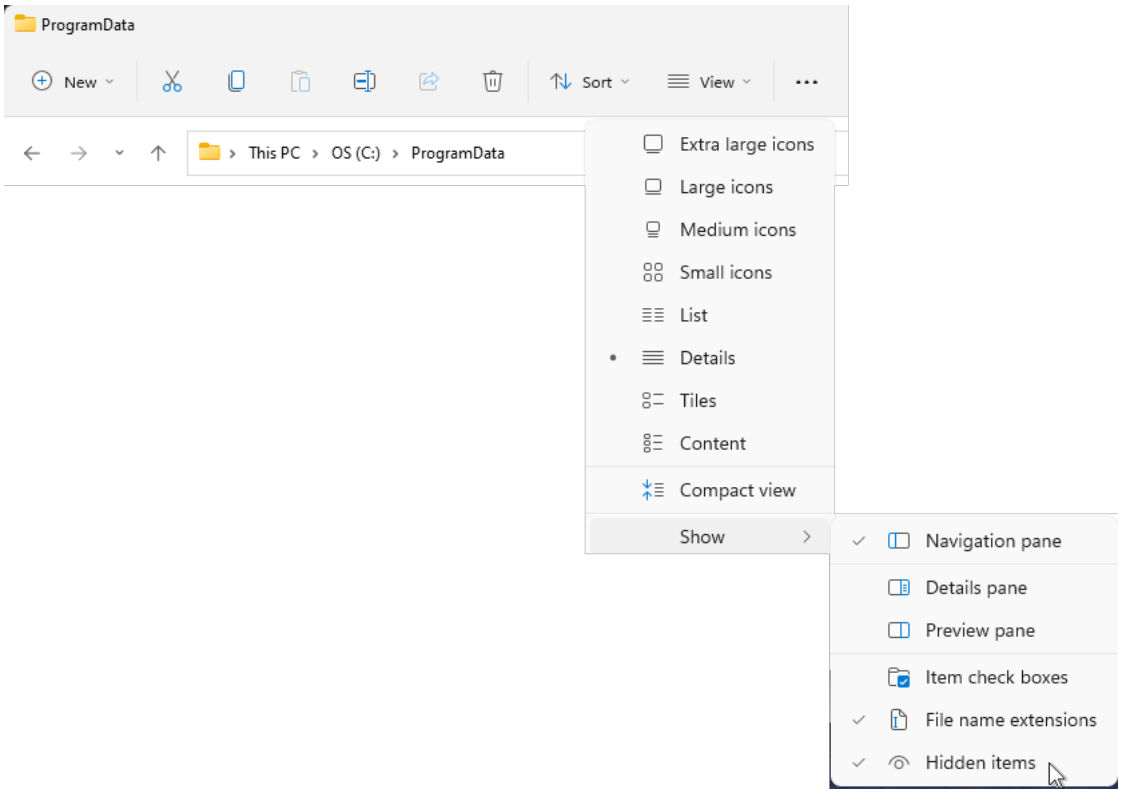
   Note: If you have the server set up to run as a Service it should be stopped and disabled. (Normally the server utility would have an entry in the Windows Service field in this case, but may not if a previous install has already failed.) Contact your system administrator if you do not know how to do this.

4. Use the Remove Programs tool in the Windows Control Panel to uninstall MemberTies. After the uninstall finishes, it will probably warn you that some things could not be uninstalled.

5. Open a File Explorer window and navigate to c:\ProgramData\MemberTies.

   Note: If you cannot see the ProgramData folder, you may need to use the View menu and choose to show hidden items. The ProgramData folder is hidden by Windows by default. Your View menu may be different than the example below, but the option to

show Hidden items should be there somewhere.



6. Delete the MemberTies folder. (DO NOT try to delete the ProgramData folder itself.)
7. Now download and install the Full professional or standard version, as applicable.
8. After the install completes, start MemberTies normally.
9. The Welcome to MemberTies window should appear.
10. On the Welcome window, choose the option to Restore a database (or if you have a hosted database, choose that option instead), and follow the instructions.

    Note: If the Login window appears instead of the Welcome window, it means you didn't remove the ProgramData\MemberTies folder and there are still old databases on your computer. The Welcome window is only displayed when the system doesn't find a database to work with. In that case, you can try using the Database Toolkit to restore your backup file.

11. Once that is complete, you should be able to log in normally.

27.2 Licensing

27.2.1 What is a License?

To use all of the functionality of the system, you must register and apply a valid license to the database. A license is obtained by registering the software. Upon registration, you will receive a license that includes the all the information needed to load that license into the system.

Note: The license becomes part of the database, so if you maintain multiple databases, you may want a separate license for each of them. This is not a requirement -- you can use the same license for more than one database -- but the organization name displayed on reports will be taken from whatever license is currently in use.

Without a valid license, you can only use a database in Unregistered mode. In this mode, the number of membership records that can be created is limited to a small number for testing purposes.

Once you have a license, it is valid for all updates (including patches, minor updates, and major upgrades) to the software for a period of one year. Once that period expires, your license will need to be renewed and the system will no longer allow new records to be created (unless you have fewer records than the small number allowed without a valid license). Normally, a message will be displayed at log in beginning 30 days prior to the expiration date of your license, so you have plenty of time to order.

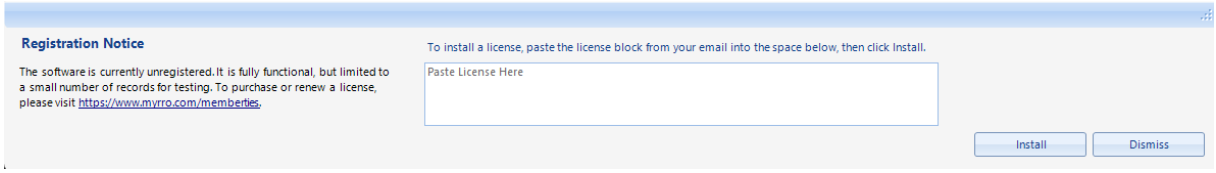
You can check the status of your license at any time.

Note: If the licenses expires, you will not lose any information, and records in excess of the maximum will **not** be lost; but, you will be unable to add more until the license information is replaced.

27.2.2 Using a License

First of all, **THANK YOU** for registering! Your support is greatly appreciated.

Your new license will generally be sent to you in an email, which should include instructions on how to apply the license. Since MemberTies is available for download at any time, you may have already seen the "reminder" Registration Notice area at the bottom of the program window.



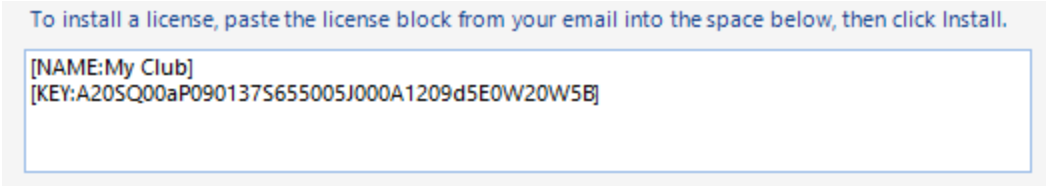
1. Copy the license information from the email you received (i.e., highlight the text and then right-click and choose Copy)

The text to copy form the email will be similar to this:

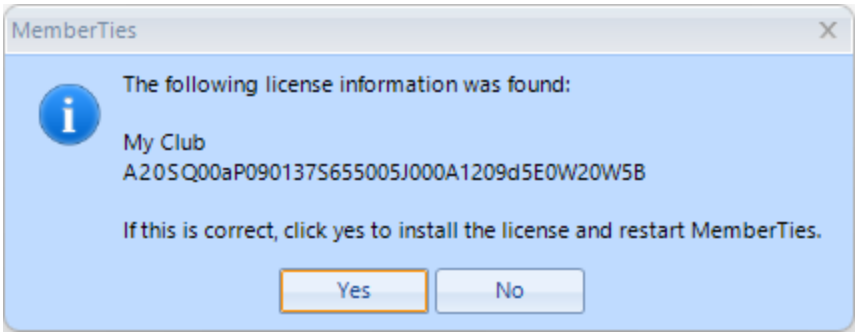
```
[NAME:My Club]
[KEY:A20SQ00aP090137S655005J000A1209d5E0W20W5B]
```

Copy **all** of the above text. Do not try to cut pieces out, omit brackets, or skip any text.

2. Right-click the "Paste License Here" field and choose Paste.



3. Click Install. The system will read the information and display a message indicating what it found.



4. Click Yes to install the license.

5. If you get an error that the license is not valid, make sure you have copied *all* of the information as described above.

Evaluation Period

There is no time limit for how long you can work with MemberTies before purchasing a license. You're just limited to 20 membership records for test purposes. So if you choose not to enter information at this time, just click "Dismiss" to close the Registration Notice. It will appear again when you restart the program.

Note: There is a difference between a license for MemberTies, and a license for MemberTies Professional -- they are not interchangeable. You can upgrade an existing standard license to the professional version by paying the difference in cost.

Updating the License on Multiple Databases

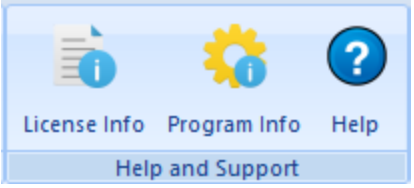
If you have multiple databases, you will need to log in to each database in turn, and apply the license.

Updating the License for Multiple Users

The license information is stored within the database itself, so as soon as one person loads a new license, it will apply to all other users. There is no need to install the license on every workstation.

Viewing Current License Information

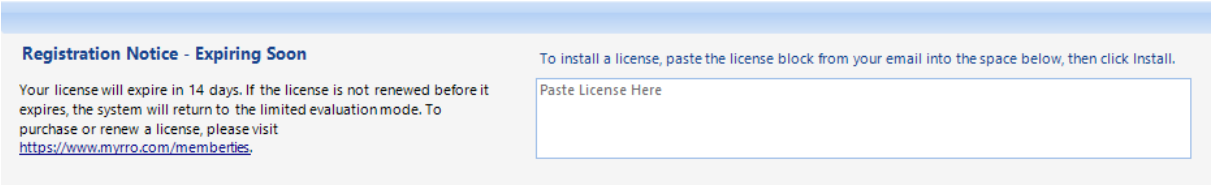
You can quickly determine when your current license expires by choosing License Info on the Home ribbon.



The window that opens will show details about the license.

License Expiration

When the license is within 30 days of its expiry date, a notice will begin to appear on the main window, just like when you added the license originally.

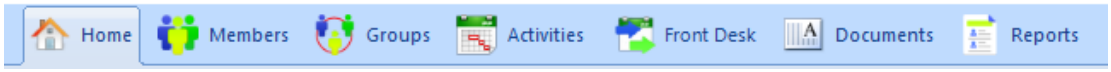


27.2.3 Viewing License Info

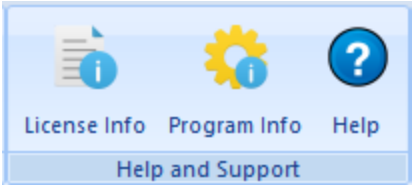
Information about the currently applied license can be displayed from the Home ribbon. An option is also available to reset (clear) the current license so the Registration area will display again when you log in.

Viewing License Info

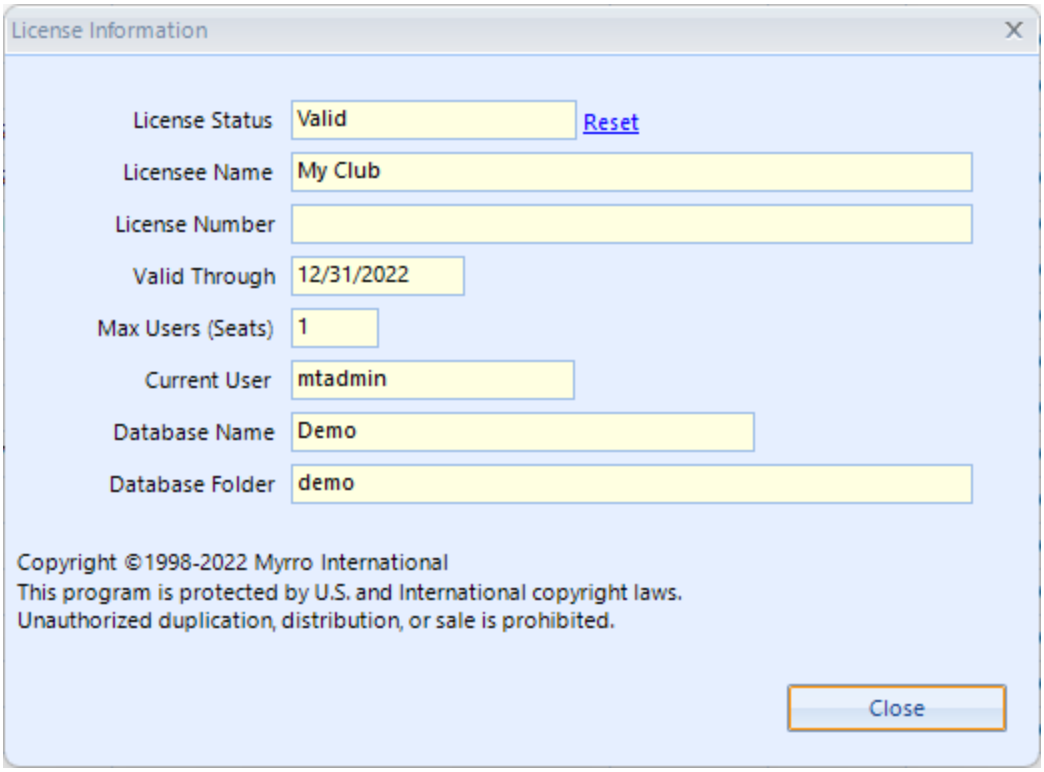
1. Choose the Home workspace by clicking the Home tab above the ribbon.



2. In the Help and Support section of the ribbon, click License Info.



3. The License Information window will open.



4. The following fields are available:

- License Status - the current state of the license. *Valid* indicates the license has more than 30 days remaining; *Expiring* indicates the license has 30 days or less remaining; *Expired* indicates the license is no longer valid.
- Licensee Name - the organization name on the license. This name will appear on all reports that show the organization name at the top.
- License Number - the unique number assigned to your organization
- Valid Through - the expiry date of the license
- Max Users (Seats) - the maximum number of users that can be logged in at the same time

- Current User - your user name
- Database Name - the currently active database profile name
- Database Folder - the folder (directory) for the database (may be the same as the database name)

Note: Clicking "Reset" (next to the License Status) will clear the existing license. This will cause the Registration Notice area to display again when you log in the next time.

27.3 Moving/New Admin

27.3.1 Moving the Software

Perhaps your term as membership director has expired and it's time to move the software to the next person, or perhaps you've purchased a new PC and need to move MemberTies from the old machine to the new one. How do you accomplish this?

The process is essentially, 1) Backup the database, 2) Install the Software, 3) Restore the database.

Moving the Software

1. If you're going to be turning the software over to a new user, the first thing you should do is create a new user for the new person to use. Otherwise, you'll have to give them your user name/password so they can log in, which makes it harder to tell who made which changes. To create a new user, see Working with Users. Create a new user with a simple password like "password". The next person can login and change it to something more secure.
2. Backup the database using the Database Toolkit. Take note of where the backup file is saved.
3. Copy the backup file you just created and take it to the new machine. You can email it, put it on removable media like a USB drive, CD-ROM, or ideally just copy it across the network.
4. Copy any additional files associated with your database and take them to the new machine. These may include photos or related files that are been saved on the computer (unless you have the database File and Photo Storage preference set to save these in the database, in which case they will be moved automatically).
5. Now, on the new machine, install MemberTies either from your original install files, or by downloading the current version from the website. DO NOT simply copy all the files from one machine to the other. You won't get all the libraries and registry entries that way, and the program will not run.

   Again... do not simply copy the program files from one machine to the other... it will cause problems.

6. Use the Database Toolkit on the new machine to restore your backup as a new database.
7. Place any additional files copied earlier in their corresponding locations on the new machine.
8. Now you should be able to start MemberTies normally and the database will appear in the list on the Login window.

Troubleshooting

- If you restored the database, but when you log in you only see the "sample" record, you may have been given a copy of a new database, or you may have accidentally restored the database to a different name. Go back to the Login window and see if there is another database listed in the Database list. If the database is there, you can use the Database Toolkit to delete the "empty" database that you don't need anymore.
- If you get Windows errors, "bad or missing .dll" errors, or other operating system messages, it normally means you've copied program files instead of installing. You have to actually install the software for it to work. Download the software from our website and run the installation program.

If you have other problems, please contact support and we'll do our best to help.

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