

# Membership Pro

## Quick Start Guide

Version 2.0.0 · June 2026

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<b>Product</b>	Membership Pro
<b>Version</b>	2.0.0
<b>Document</b>	Quick Start Guide
<b>Audience</b>	New users and administrators
<b>Publisher</b>	Computer Aided Business Systems (CABS)

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## 1. Welcome

Membership Pro helps your organization manage its members and households, organize them into groups, run events and record attendance, track contributions, and — optionally — collect membership dues and keep simple finances. It also produces professional reports and can send email to your members.

This Quick Start Guide takes you from installing the software to carrying out the everyday tasks. For step-by-step detail on every feature, see the User Guide; for structured lessons, see the Training Manual.

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## 2. Installing & First-Run Setup

Installing takes a few minutes and only needs to be done once per computer.

### Install the application

1. Run the Membership Pro installer and follow the prompts.
2. When installation finishes, launch Membership Pro.

### Complete first-run setup

The very first time you open Membership Pro, a short setup wizard guides you through the essentials:

1. **Organization details.** Enter your organization's name, type, contact information and logo.
2. **Currency & format.** Choose your currency and regional format, and the month your financial year starts.
3. **Where data is stored.** Choose the built-in database (recommended for a single computer) or Microsoft SQL Server (for shared, multi-computer use).
4. **Administrator account.** Create the first user account — your administrator login.
5. **Finish.** The wizard prepares your database. You are then ready to sign in.

**Tip** The on-screen wording adapts to your organization type, so the labels you see fit your context.

### Sign in

Enter the username and password you created and select Sign In. You arrive at the main window.

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## 3. Finding Your Way Around

The menus across the top of the main window group the features by area:

- **Members & Households** — add and manage people, and the households they belong to.
- **Groups** — organize members into groups, each with an optional meeting schedule.
- **Events & Attendance** — record events and who attended them.
- **Contributions** — record giving, and manage funds and donors.

- **Dues & Finance** — when enabled, manage membership dues, payments and a finance cashbook.
- **Communications** — email your members, manage message templates, and view the send log.
- **Reports** — produce PDF reports across every area.
- **Administration** — manage user accounts, roles and permissions, review the audit log, and edit your organization profile.

**Note** The menus and actions you can see depend on your role's permissions. An administrator can see and do everything; other roles see only what they are permitted to.

## 4. Your First Tasks

Here are the core tasks most organizations carry out first. Each follows the same simple pattern: open the relevant list, choose Add, fill in the details, and Save.

### Add a member

1. Open Members and select Add.
2. Enter the member's name and any contact, household and membership details.
3. Select Save. The member now appears in the list.

### Create a household

1. Open Households and select Add.
2. Give the household a name and add its members.
3. Select Save.

### Set up a group

1. Open Groups and select Add.
2. Name the group and add its members.
3. To have the group's meetings created automatically, set a recurring schedule on the Meeting Schedule tab (for example, weekly, or the second Tuesday each month).
4. Select Save.

### Record attendance

1. Open Events & Attendance and choose the event (or add a new one).
2. Mark who attended.
3. Select Save.

### Record a contribution

1. Open Contributions and select Add.
2. Choose the giver and fund, enter the amount and date.
3. Select Save.

### Turn on membership dues (optional)

1. On the organization profile, switch on Collect membership dues.

2. Define your membership types and set each type's annual dues rate.
3. Generate the year's dues assessments — members who joined mid-year are pro-rated automatically.
4. Record payments against assessments as they come in.

**Tip** Leave dues switched off if your organization does not charge them — the dues and finance menus stay hidden until you turn them on.

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## 5. Sending Messages

Membership Pro can send email to your members once you have entered your email account details.

1. **Set up email.** Open Communications > Settings and enter your email (SMTP) account details. You only do this once.
2. **Compose.** Choose who receives the message — all members, a group, or one person — then write your message or start from a saved template.
3. **Personalize.** Use merge fields (such as the member's first name) so each recipient gets a personalized message.
4. **Send.** Membership Pro shows how many recipients will receive the message and how many are skipped, then sends.

Event notices and birthday greetings work the same way, from their own menu items. The birthday call list lets you email a formatted list of upcoming birthdays to the people you choose.

**Note** Members who have opted out of email are skipped automatically, and every message sent (and any that failed) is recorded in the communications log for your records.

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## 6. Producing Reports

1. Open the Reports menu and choose the report you want.
2. Set any options the report offers (such as a date range or a particular group).
3. Generate the report. It opens as a PDF you can print or share.

Reports are available across members, households, groups, attendance, contributions and — when enabled — dues and finance.

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## 7. Backing Up Your Data

Regular backups protect your records against hardware failure or accidental loss.

- **Built-in database.** Back up your data regularly, and always before installing an update. Use the backup option provided in the application.
- **Microsoft SQL Server.** Backups are handled by your database administrator through SQL Server's own tools.

**Tip** Make a backup immediately before upgrading to a new version, as a routine precaution.

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## 8. Getting Help

Open the **Help › Documentation** menu at any time to open the full guides. For assistance, contact Computer Aided Business Systems at **support@membershippro.net**.