

Membership Pro

Release Notes

Version 2.0.0 · June 2026

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1. Overview

Membership Pro 2.0.0 is a major release. It builds on the membership, household, group, attendance and contribution management of version 1.0 and adds four substantial capabilities: membership dues, a finance cashbook, recurring events with automatic meeting schedules, and built-in email communications. Reporting, configuration and administration have all been extended to support these new areas.

This release is delivered as an in-place upgrade. Opening version 2.0.0 over an existing installation updates the database automatically; your existing records are preserved and the new dues and finance features remain switched off until you choose to enable them.

At a glance:

- **Membership dues** — optional dues collection with per-type rates, automatic mid-year pro-ration, payments and arrears.
- **Finance & cashbook** — classify money in and out, with contributions and dues posting to the categories you choose.
- **Recurring events** — weekly and monthly meeting schedules that generate their own events and roll forward automatically.
- **Communications** — send personalized email to all members, a group or an individual, with templates, notices and a send log.

2. What's New in 2.0

2.1 Membership Dues

Dues are optional and entirely self-contained. Until you turn them on, no dues menus, fields or reports appear.

- **Enable per organization.** A single “Collect membership dues” setting on the organization profile switches the whole area on or off.
- **Membership types and rates.** Define membership types (for example Regular, Student, Senior and Life), each with its own annual dues rate.
- **Annual assessments.** Generate a year's dues assessments for all members in one step. Members who joined part way through the year are automatically pro-rated for the months remaining, so no one is over-charged in their first year.
- **Payments and arrears.** Record full or partial payments against each assessment, void a payment entered in error, and see outstanding balances at a glance.
- **Separate tracking by type.** Different dues can be routed to different finance categories — for example senior dues and life-member dues tracked apart from general dues — with a sensible default for everything else.
- **Dues reporting.** Member statements, an outstanding-balances (arrears) report and a dues summary.

2.2 Finance & Cashbook

- **Finance categories.** Classify money in and out. A category can be designated as a target for contributions, for dues, or both.
- **Cashbook.** A single view of finance transactions so you can see activity in one place.
- **Automatic posting.** Contributions and dues payments post to the finance categories you choose, keeping your financial picture consistent with your membership records.

2.3 Recurring Events & Meeting Schedules

- **Recurring schedules.** Define a weekly or monthly schedule — including patterns such as “the second Tuesday of every month” — and Membership Pro creates the individual events for you, extending them forward automatically over time.
- **Change going forward.** Adjust a schedule from a chosen date onward without disturbing past meetings, or change the whole series, as needed.
- **Group meeting schedules.** Give a group its own recurring schedule and its meetings are generated automatically. Deactivating a group cleanly switches off its future meetings while keeping the history of past ones intact.

2.4 Communications (Email)

- **Email from within Membership Pro.** Send to all active members, the members of a group, or a single member, using your organization's email account.
- **Templates and merge fields.** Build reusable message templates with merge fields such as the member's first name, so each recipient receives a personalized message.
- **Event notices and birthday greetings.** Send a notice about an event, or a birthday greeting, in a few clicks.
- **Birthday call list.** Email a neatly formatted list of upcoming birthdays to the people you choose, so they can reach out — you select the recipients rather than sending to everyone.
- **Consent respected.** Members who have opted out of email are automatically skipped, and you are told how many were skipped before anything is sent.
- **Communications log.** Every message sent — and any that failed — is recorded, so you have a record of what went out and when.

2.5 Reporting

Reporting has been broadened to cover the new areas. Reports across members, households, groups, attendance, contributions, dues and finance are produced as professional PDF documents ready to print or share.

2.6 Configuration & Localization

- **Currency and locale everywhere.** Amounts now display in your organization's configured currency and regional format consistently across the application and in every report — for example Naira (₦) or US Dollars (\$) — rather than following the regional setting of the computer.
- **Terminology packs.** On-screen wording adapts to your organization type, so a club and a church each see language that fits, including the names used for event types.

- **Editable organization profile.** Update your organization's name, contact details, logo, currency, fiscal-year start and tax disclaimer after initial setup.

2.7 Administration & Security

- **Audit log viewer.** Administrators can review a log of changes — who changed what, and when — from within the application.
 - **Finer-grained permissions.** Access to individual reports and to contribution functions can be controlled by role, giving administrators more precise control over who can do what.
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3. Improvements & Fixes

This release also includes refinements identified during pre-release testing:

- **Currency display.** Money values follow your organization's currency and locale throughout, instead of the computer's regional setting. A change to your currency or locale now takes effect immediately, without restarting.
 - **Event-type wording.** Event-type names follow your active terminology pack, so an organization sees wording appropriate to it rather than terms from another organization type.
 - **Birthday call list recipients.** The birthday call list now lets you choose who receives it, using the same recipient chooser as other messages.
 - **Group deactivation.** Deactivating a group now also switches off its future meetings, so no scheduled meetings linger for a group that is no longer active. Past meetings are preserved.
 - **Reliability and layout.** Various stability and on-screen layout refinements.
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4. Upgrading to 2.0

Upgrading is automatic and requires no manual steps:

1. Back up your database first, as a routine precaution.
2. Install version 2.0.0 over your existing installation.
3. Start Membership Pro. The first time it opens, your database is updated in place.

What is preserved: all existing members, households, groups, attendance, contributions and events carry forward unchanged.

Enabling dues: dues and finance features stay switched off after the upgrade. To begin using dues, turn on “Collect membership dues” on the organization profile, then define your membership types and rates.

Database options: both the built-in single-file database and Microsoft SQL Server are supported; the upgrade applies to whichever you use.

5. System Requirements

- Windows 10 or Windows 11 (64-bit).
 - Microsoft .NET Framework 4.8 (included with current versions of Windows).
 - No separate database server is required for the built-in database. Microsoft SQL Server is optional, for networked or multi-user deployments.
 - An email account (SMTP) is required only if you intend to use the email communications features.
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6. Notes & Roadmap

- **Dues are optional.** Organizations that do not collect dues are unaffected by the new dues and finance areas.
 - **Additional messaging channels.** The communications features in this release are email-based. Further channels are planned for a future edition.
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7. Support

For assistance, contact Computer Aided Business Systems at support@membershippro.net.

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