Membership Pro

Training Manual

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Product	Membership Pro
Version	2.0.0
Document	Training Manual
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Contents

1. Before You Begin

This Training Manual teaches Membership Pro through short, hands-on modules. It is written for new staff and volunteers, and works equally well for self-paced study or instructor-led training. No prior experience with the software is assumed.

How this manual is organized

Each module follows the same pattern, so you always know what to expect:

- **Objectives** — what you will be able to do when you finish the module.
- **Lesson** — the key ideas, kept brief. The User Guide has the full detail if you want it.
- **Exercise** — a hands-on task to practice what you have just learned.
- **Checkpoint** — a quick way to confirm you are ready to move on.

> **Important** Practice on a test setup or on records you do not mind changing — not on live data — until you are confident. Ask your administrator if you are unsure which to use.

For some modules you will need administrator access; these are clearly marked. Otherwise you only need an installed copy of Membership Pro and a sign-in.

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2. Getting Oriented

Objectives

By the end of this module you will be able to:

- Sign in to Membership Pro.
- Identify the main areas from the menus.
- Recognize the common controls shared by list windows.
- Understand how your role affects what you can see and do.

Lesson

Sign in with your username and password to reach the main window. The menus across the top group the features by area: Members and Households, Groups, Events and Attendance, Contributions, Dues and Finance (when enabled), Communications, Reports, and Administration.

Most areas open a list window that works the same way everywhere: a search box to find records, a “Show inactive” option, and Add, Edit and Deactivate buttons. Double-clicking a row opens it. What you can see depends on your role's permissions, so your menus may differ from a colleague's.

Exercise — Try it yourself

1. Sign in to Membership Pro.
2. Open the Members list, then the Groups list, then the Reports menu.
3. Note which menus appear for you. If something described here is missing, your role may not have access to it.

4. Try the search box and the “Show inactive” option on the Members list.

> **Checkpoint** You can sign in, name the main areas, use the shared list controls, and explain why your menus might differ from someone else's.

3. Building Your Membership

Objectives

By the end of this module you will be able to:

- Add and edit a member.
- Set a member's email contact preference.
- Create a household and choose its head.
- Assign members to a household.

Lesson

Members are the people your organization tracks. Each member record has tabs for identity and contact details, and a setting for whether the member may be contacted by email. Keeping that preference accurate matters, because members who opt out are skipped automatically when you send messages.

Households group related members and identify a head of household, which helps with correspondence and reporting.

Exercise — Try it yourself

1. Open Members and add two new members, with names and contact details.
2. For one of them, clear the email contact preference.
3. Open Households and create a household; add both members to it.
4. Choose one member as the head of the household, and Save.

> **Checkpoint** You can add and edit members, control a member's email preference, and build a household with a designated head.
>
> **Trainer tip** Emphasize email preferences early. A clean preference list is what keeps later communications both effective and respectful.

4. Organizing Groups

Objectives

By the end of this module you will be able to:

- Create a group and add members.
- Give a group a recurring meeting schedule.
- See how meeting events are generated automatically.

- Understand what happens when a group is deactivated.

Lesson

Groups organize members for any purpose. A group can also carry a recurring meeting schedule — weekly, or monthly patterns such as the second Tuesday of each month — and Membership Pro then generates the group's meeting events for you, rolling them forward over time.

Deactivating a group removes it from everyday lists while keeping its history, and switches off its future meetings. Reactivating does not restore the old schedule; you add a fresh one if the group meets again.

Exercise — Try it yourself

1. Create a group and add several members.
2. On the Meeting Schedule tab, set a weekly schedule and Save.
3. Open Events & Attendance and find the meetings that were generated for the group.
4. (Optional) Deactivate a test group and confirm its future meetings are switched off.

> **Checkpoint** You can create a group, schedule its meetings so events are generated automatically, and predict the effect of deactivating it.

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5. Events & Attendance

Objectives

By the end of this module you will be able to:

- Record attendance for an event.
- Recognize how recurring events are produced.
- Change a recurring event using the right scope.

Lesson

Events are gatherings you take attendance for. Recurring events — including group meetings — are generated automatically and roll forward over time.

When you change a recurring event, choose the scope: “this and future occurrences” applies the change from a date onward and leaves the past untouched, while “the whole series” changes every occurrence. Use “this and future” when something changes partway through the year, so history stays accurate.

Exercise — Try it yourself

1. Open an upcoming meeting generated by your group's schedule.
2. Mark who attended and Save.
3. Change a future occurrence — for example its time — using “this and future occurrences”.
4. Confirm that past occurrences were not affected.

> **Checkpoint** You can record attendance and change a recurring event without disturbing its history.

6. Recording Contributions

Objectives

By the end of this module you will be able to:

- Set up a fund.
- Record contributions as a batch.
- Record a pledge and track it.
- Produce a contribution statement.

Lesson

The Contributions area records giving against funds, which classify giving by purpose. Givers may be members or non-members. Entering contributions as a batch for a giving occasion speeds up entry and reconciliation.

A pledge records a giving commitment that you can track as contributions come in. Statements summarize a giver's contributions over a period and can be produced for one person or for everyone.

Exercise — Try it yourself

1. Create a fund (for example a general fund).
2. Start a batch and enter three contributions against the fund.
3. Record a pledge for one member.
4. Generate a contribution statement for that member.

> **Checkpoint** You can set up a fund, record contributions efficiently in a batch, track a pledge, and produce a statement.

7. Membership Dues

> **Note** This module applies only if your organization collects dues. If it does not, you can skip to Module 9.

Objectives

By the end of this module you will be able to:

- Turn on dues collection.
- Define membership types and rates.
- Generate annual assessments, with automatic pro-ration.
- Record payments and read arrears.

Lesson

Dues are optional and appear only when enabled on the organization profile. You define membership types and an annual rate for each. Generating a year's assessments creates a charge for every member by type; members who joined mid-year are pro-rated automatically.

You then record full or partial payments against assessments, void a payment entered in error, and read arrears to see who still owes.

Exercise — Try it yourself

1. On the organization profile, switch on Collect membership dues.
2. Define two membership types with annual rates.
3. Generate this year's assessments.
4. Record a partial payment against one member's assessment, then view the arrears.

> **Checkpoint** You can enable dues, set up types and rates, generate pro-rated assessments, record payments, and interpret arrears.

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8. Finance & Cashbook

Objectives

By the end of this module you will be able to:

- Create a finance category.
- Mark a category as a posting target.
- Read the cashbook.

Lesson

Finance categories classify money in and out. A category can be a target for contributions, for dues, or both — that is how giving and dues payments reach your finances. The cashbook lists finance transactions in one place.

Setting up your finance categories before you enter contributions or generate assessments ensures everything posts to the right place from the start.

Exercise — Try it yourself

1. Create a finance category and mark it as a contribution target.
2. Record a contribution to the matching fund.
3. Open the cashbook and find the resulting transaction.

> **Checkpoint** You can create finance categories, direct giving and dues to them, and locate activity in the cashbook.

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9. Communicating with Members

Objectives

By the end of this module you will be able to:

- Set up email (or review the settings).
- Compose a personalized message from a template.
- Understand how opted-out members are skipped.
- Find a message in the communications log.

Lesson

Membership Pro sends email to your members once your email (SMTP) account details are entered. Templates save messages you reuse, and merge fields such as a member's first name personalize each one. Before sending, you see how many recipients will receive the message and how many are skipped; members who opted out are skipped automatically. Every message is recorded in the communications log.

> **Trainer tip** Have learners send their first message to a small test group, so mistakes are harmless and the log clearly shows what happened.

Exercise — Try it yourself

1. Open Communications › Settings and review (or enter) the email account details.
2. Create a template that uses a first-name merge field.
3. Send the message to a small test group, and read the recipient summary before sending.
4. Open the communications log and confirm the message was recorded.

> **Checkpoint** You can set up email, build a personalized template, send responsibly to a group, and verify results in the log.

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10. Reporting

Objectives

By the end of this module you will be able to:

- Generate a report.
- Set report options such as a date range.
- Share a report as a PDF.

Lesson

Reports are produced as PDF documents you can print or share. Open the Reports menu, choose a report, set any options it offers (such as a date range or a particular group), and generate it. Reports cover members, households, groups, attendance, contributions, and — when enabled — dues and finance.

Exercise — Try it yourself

1. Generate a member directory.

2. Generate a giving-by-date-range report for last month.
3. Save or print one of the PDFs.

> **Checkpoint** You can generate reports, set their options, and share the resulting PDFs.

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11. Administering the System

> **Note** This module requires administrator access.

Objectives

By the end of this module you will be able to:

- Create a user and assign a role.
- Adjust a role's permissions.
- Review the audit log.
- Edit the organization profile and make a backup.

Lesson

Administrators manage user accounts and roles, which control what each person can see and do — down to individual reports and contribution functions. Permission changes take effect the next time the affected user signs in. The audit log records who changed what and when. The organization profile holds your name, logo, currency, fiscal-year start, tax disclaimer and the dues setting.

Regular backups protect your data; always back up before installing an update.

Exercise — Try it yourself

1. Create a user and assign a role with limited permissions.
2. Sign in as that user to confirm the restricted menus, then sign back in as administrator.
3. Open the audit log and find the change you just made.
4. Review the organization profile, then make a backup.

> **Checkpoint** You can manage users and permissions, audit changes, maintain the organization profile, and back up the system.

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12. Where to Go Next

You have now practiced every major area of Membership Pro. Keep the User Guide nearby for full detail on any feature, and the Quick Start Guide for a fast refresher.

Course completion checklist

You should now be able to:

- Sign in and navigate the main areas.

- Manage members and households, including contact preferences.
- Organize groups and schedule their meetings.
- Record attendance and manage recurring events.
- Record contributions, pledges and statements.
- Run membership dues, where your organization uses them.
- Work with finance categories and the cashbook.
- Communicate with members responsibly and review the log.
- Produce and share reports.
- Administer users, permissions, the audit log, the organization profile and backups.

Questions or problems? Contact Computer Aided Business Systems at support@membershippro.net.