Membership Pro

User Guide

Version 2.0.0 · June 2026

Product	Membership Pro
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Contents

1. Introduction

This User Guide is the complete reference for Membership Pro. It explains every area of the application in the order you are likely to use them, from adding your first members through to producing reports and administering the system.

Membership Pro manages the members of an organization and the groups, events, giving, dues and communications that go with them. Wording on screen adapts to your organization type, so the labels you see may differ slightly from the generic terms used here (member, group, event, contribution).

How this guide is organized

- **Getting Started** covers installation, first-run setup and the main window.
- **Chapters 3 to 9** each cover one functional area in task order.
- **Reports and Administration** cover output and system settings.

> **Note** What you can see and do depends on your role's permissions. If a menu or button described here does not appear for you, your role may not have access to it; ask an administrator.

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2. Getting Started

2.1 Installing

1. Run the installer and follow the prompts.
2. Launch Membership Pro when installation completes.

Membership Pro runs on Windows 10 or 11 (64-bit). It needs no separate database server for everyday single-computer use.

2.2 First-run setup

The first time the application starts, a setup wizard collects the essentials and prepares your database. You will be asked for:

- Your organization's name, type, contact details and logo.
- Your currency and regional format, and the month your financial year begins.
- Where data is stored — the built-in database, or Microsoft SQL Server for shared use.
- An administrator username and password.

> **Important** Your organization type and terminology are chosen during setup and are not changed afterward, because they affect wording throughout the application. Choose the type that best matches your organization.

2.3 Signing in and the main window

Sign in with your username and password. The main window has menus across the top, grouped 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 where you can search, add, edit, and deactivate records.

Tip Most list windows share the same controls: a search box, a “Show inactive” option, and Add / Edit / Deactivate buttons. Double-click a row to open it.

3. Members & Households

Members are the people your organization tracks. Households group members who live together, with one member designated as the household head.

3.1 Adding and editing a member

1. Open Members and select Add (or select a member and choose Edit).
2. On the Identity tab, enter the member's name and, if relevant, date of birth and membership type.
3. On the Contact tab, enter phone, email and address details.
4. Set the member's communication preference — whether they may be contacted by email.
5. Optionally add a photo, and assign the member to a household.
6. Select Save.

Note If a member asks not to be emailed, clear their email permission. They will then be skipped automatically whenever you send messages.

3.2 Households

A household links related members together and identifies a head of household, which is useful for addressing correspondence and for reporting.

1. Open Households and select Add.
2. Name the household and add its members.
3. Choose which member is the head of the household.
4. Select Save.

3.3 Finding members

Use the search box on the Members list to find people by name. Turn on “Show inactive” to include members you have previously deactivated. Deactivating a member keeps their history but removes them from everyday lists and pickers.

4. Groups

Groups organize members for any purpose — teams, classes, committees, ministries, or social groups. A group can also carry its own recurring meeting schedule.

4.1 Creating a group

1. Open Groups and select Add.
2. Enter the group's name, type and meeting details.

3. Add members to the group.
4. Select Save.

4.2 Meeting schedules and automatic events

Give a group a recurring schedule and Membership Pro creates the group's meeting events for you, extending them forward over time so the calendar stays populated.

1. Open the group and go to the Meeting Schedule tab.
2. Choose how often the group meets — weekly, or monthly (including patterns such as the second Tuesday of each month).
3. Set when the schedule starts and, if relevant, when it should end.
4. Save. The individual meetings are generated automatically.

> **Tip** To change a schedule later, edit it on the same tab. You can change meetings going forward without disturbing meetings that have already happened.

4.3 Deactivating a group

Deactivating a group removes it from everyday lists while keeping its history. If the group has a meeting schedule, its future meetings are switched off as well (past meetings are kept). You are told this before you confirm.

> **Note** Reactivating a group does not bring back its old schedule. If the group meets again, add a fresh schedule on the Meeting Schedule tab.

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5. Events & Attendance

Events represent gatherings — services, meetings, classes or any occasion you take attendance for. Each event has a type, and attendance records who was present.

5.1 Recording attendance

1. Open Events & Attendance and select the event, or add a new one.
2. Mark each member as present or absent.
3. Select Save.

5.2 Recurring events

Events can recur on a schedule, in the same way as group meetings. Membership Pro generates the individual occurrences and rolls them forward automatically. Group meeting schedules (Chapter 4) are one source of recurring events; you can also define recurring events directly.

5.3 Changing a recurring event

When you change a recurring event you can choose the scope of the change:

- **This and future occurrences —** applies the change from a chosen date onward, leaving past occurrences untouched.

- **The whole series —** applies the change across all occurrences.

> **Tip** Use “this and future” when something changes partway through the year — for example a meeting moving to a new time — so your historical records stay accurate.

6. Contributions

The Contributions area records giving and the funds and donors associated with it.

6.1 Funds and donors

- **Funds** classify giving by purpose (for example a general fund, a building fund, or a special appeal).
- **Donors** may be members or non-members; both can be recorded as givers.

6.2 Recording contributions

Contributions can be entered individually or grouped into a batch for a giving occasion, which makes rapid entry and reconciliation easier.

1. Open Contributions and start a new entry or batch.
2. Choose the giver and the fund, and enter the amount and date.
3. Save. Repeat for each gift in the batch.

6.3 Pledges

A pledge records a giving commitment, either as a single amount or spread across periods. As contributions are recorded, you can track progress against the pledge and mark it complete.

6.4 Statements

Contribution statements summarize a giver's contributions over a period and can be produced for a single member, a single donor, or everyone. Statements include your organization's tax disclaimer where applicable.

7. Membership Dues

> **Note** Dues are optional. The dues and finance areas appear only when “Collect membership dues” is switched on in your organization profile. If your organization does not charge dues, you can skip this chapter.

7.1 Turning on dues

1. Open Administration › Organization Profile and switch on Collect membership dues.
2. Define your membership types (for example Regular, Student, Senior) and set each type's annual dues rate.
3. Save.

7.2 Generating assessments

An assessment is a member's dues charge for a year. Generate a year's assessments in one step and Membership Pro creates a charge for every member according to their membership type.

> **Tip** Members who joined partway through the year are pro-rated automatically — they are charged only for the months remaining in their first year, so no one is over-charged.

7.3 Recording payments and tracking arrears

1. Open a member's dues assessment.
2. Record a payment — full or partial — against it.
3. If a payment was entered in error, void it to reverse it.

Outstanding balances are tracked as arrears, so you can see at a glance who has paid, who has paid in part, and who still owes.

7.4 How dues feed your finances

Each membership type's dues can be directed to a finance category, so different kinds of dues can be tracked separately (for example senior dues and life-member dues), with a default category for everything else. See Chapter 8.

8. Finance & Cashbook

The Finance area gives you a simple, consistent picture of money in and out, tied to your membership records. Like dues, it appears when dues collection is enabled.

8.1 Finance categories

Finance categories classify money. A category can be marked as a target for contributions, for dues, or both, which is how giving and dues payments find their way into your finances.

8.2 The cashbook

The cashbook lists finance transactions in one place, so you can review activity without piecing it together from separate areas. Contributions and dues payments post to the categories you have chosen.

> **Tip** Set up your finance categories before generating dues assessments or recording contributions, so everything posts to the right place from the start.

9. Communications

Membership Pro can send email to your members directly, with templates, personalization, and a record of everything sent.

9.1 Setting up email

1. Open Communications › Settings.
2. Enter your email (SMTP) account details — server, port, sign-in and the address messages are sent from.
3. Save. You only need to do this once.

9.2 Composing and sending

1. Open Communications › Compose.
2. Choose recipients: all members, the members of a group, or a single member.
3. Write your message, or start from a saved template.
4. Insert merge fields (such as the member's first name) to personalize each message.
5. Review the recipient summary — it shows how many will receive the message and how many are skipped — then send.

> **Note** Members who have opted out of email are skipped automatically. You are always shown the count of skipped recipients before anything is sent.

9.3 Templates and merge fields

Templates save messages you send often. Merge fields are placeholders, such as a member's first name, that are filled in for each recipient when the message is sent, so a single template produces personalized messages.

9.4 Event notices and birthday greetings

- **Event notices** send a message about an event to your chosen recipients.
- **Birthday greetings** send a greeting to members whose birthday is coming up.
- **Birthday call list** emails a formatted list of upcoming birthdays to the people you choose, so they can reach out. You select who receives the list.

9.5 The communications log

Every message sent — and any that failed — is recorded in the communications log, with the recipient, subject, time and status. Open Communications › Log to review it and to see the content of any message.

10. Reports

Reports are produced as professional 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 are available across these areas:

Area	Examples
Members & Households	Member directory; household rosters

Area	Examples
Groups	Group rosters (all groups or a single group)
Attendance	Attendance summaries and trends
Contributions	Giving by date range; giving by fund; batch deposit; contribution statements
Dues & Finance	Dues statements; arrears (outstanding balances); dues summaries

> **Tip** Statements and many reports can be produced for one person or for everyone, depending on what you need.

11. Administration

Administration covers the settings and controls that keep your installation running the way you want. These features are typically restricted to administrators.

11.1 Users, roles and permissions

Each person who signs in has a user account and a role. Roles control what their holders may see and do, down to individual reports and contribution functions. Adjust a role's permissions to grant or restrict access; changes take effect the next time the affected user signs in.

11.2 The audit log

The audit log records changes made in the system — who changed what, and when. Open Administration › Audit Log to review it. It is a read-only record for accountability.

11.3 Organization profile

The organization profile holds your organization's name, contact details, logo, currency and regional format, fiscal-year start, tax disclaimer and the “Collect membership dues” setting. Update it from Administration › Organization Profile.

> **Note** Changing your currency or regional format takes effect immediately — amounts throughout the application and in reports update to the new setting. Your organization type and terminology, however, are fixed after setup.

11.4 Backup and restore

Protect your data with regular backups. For the built-in database, use the backup option provided in the application, and always back up before installing an update. For Microsoft SQL Server, backups are handled by your database administrator.

12. Tips & Glossary

12.1 Working efficiently

- Use the search box and “Show inactive” option on every list to find records quickly.

- Double-click a row to open it for editing.
- Set up funds, membership types and finance categories before bulk data entry, so everything is classified correctly from the start.
- Keep member email permissions up to date so messages reach the right people.

12.2 Glossary

Term	Meaning
Member	A person your organization tracks.
Household	A set of related members with a designated head.
Group	A collection of members, optionally with a meeting schedule.
Event	A gathering you can take attendance for.
Occurrence	A single dated instance of a recurring event.
Contribution	A recorded gift, classified by fund.
Pledge	A giving commitment tracked over time.
Assessment	A member's dues charge for a year.
Arrears	Outstanding (unpaid) dues.
Finance category	A classification for money in and out.
Merge field	A placeholder filled in per recipient when a message is sent.
Role	A set of permissions assigned to users.

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