

1. HOME— CHANGES	2
MEMBERSHIP HOME PAGE	
<input type="button" value="LOGOUT"/>	
<input type="button" value="ADMIN"/>	2
2. ADD NEW MBR— CHANGES	3
ADDING A NEW MEMBER	3
3. MBR INFO—	4
4. EDINFO—MENU.....	4
5. EDINFO→EDI FOR ACTIVE MCID— CHANGES	5
<i>Extended Donor Information</i>	5
6. EDINFO→ADD EDI FOR ACTIVE MCID— CHANGES	5
EXTENDED DONOR INFORMATION FOR XXXXX	5
7. EDINFO→DELETE EDI FOR ACTIVE MCID— CHANGES(?)	13
8. EDINFO→LIST ALL MCIDS WITH EDI—.....	14
9. SOLICIT—MENU	14
10. SOLICIT→CALLING SCRIPTS— CHANGES	14
SOLICITATION INFORMATION	
<input)<="" td="" type="button" value="CLOSE"/> <td>14</td>	14
11. SOLICIT→CREDIT CARD PAYMENT—.....	17
12. SOLICIT→PAYPAL PAYMENT—	17
13. SOLICIT→PAYMENT CONFIRMATION—	17
14. REMINDERS—MENU	17
15. REMINDERS→DISPLAY EXPIRED—[REFER TO SEPARATE DOCUMENTATION].....	17
16. REMINDERS→PRINT LABELS AND LETTERS— CHANGES	18
LABELS AND LETTERS LIST	18
LABELS AND LETTERS UPDATE	20
LABELS AND LETTERS LIST	20
17. REMINDERS→IN-PROGRESS REMINDERS— CHANGES	22
IN-PROGRESS REMINDERS	
<input)<="" td="" type="button" value="CLOSE"/> <td>22</td>	22
18. REMINDERS→REMINDERS EXPLAINED—[REFER TO SEPARATE DOCUMENTATION].....	22
19. REPORTS—MENU	23
20. REPORTS→FUNDING PAID REPORT— CHANGES	23
FUNDING PAID REPORT	
<input)<="" td="" type="button" value="CLOSE"/> <td>23</td>	23
21. REPORTS→PRINT LABELS ON CRITERIA— CHANGES	24
PRINT LABELS	
<input)<="" td="" type="button" value="CLOSE"/> <td>24</td>	24
22. REPORTS→MEMBERSHIP DRILL DOWN REPORT— CHANGES	25
MEMBER SUMMARY DRILLDOWN	
<input)<="" td="" type="button" value="CLOSE"/> <td>25</td>	25
23. REPORTS→NEW SUPPORTERS BY DATE RANGE— CHANGES	28
NEW SUPPORTERS REPORT	
<input)<="" td="" type="button" value="CLOSE"/> <td>28</td>	28
24. REPORTS→MEMBERSHIP EXCEPTION REPORT— CHANGES	29
MBRDB EXCEPTION REPORT	
<input)<="" td="" type="button" value="CLOSE"/> <td>29</td>	29
25. REPORTS→SUBSCRIBING MEMBERS REPORT— CHANGES	31
SUBSCRIBING MEMBERS REPORT	
<input)<="" td="" type="button" value="CLOSE"/> <td>31</td>	31
26. REPORTS→CORRESPONDENCE DRILL DOWN—	33
CORRESPONDENCE SUMMARY DRILLDOWN	
<input)<="" td="" type="button" value="CLOSE"/> <td>34</td>	34
27. REPORTS→TRANSACTION LOG REPORT—	38
28. REPORTS→INACTIVE MCID REPORT— CHANGES	38
29. REPORTS→MAIL LOG VIEWER—.....	39
30. REPORTS→LUBUNTY REPORT— CHANGES(?)	39
31. REPORTS→SYBUNTY REPORT— CHANGES(?)	40
32. REPORTS→MONTHLY REPORT— CHANGES(?)	40
33. REPORTS→ABOUT MBRDB—	42
ABOUT MBRDB	

My notes about screens/text are *[italicized in square brackets]*.

Changes to text are **highlighted**.

Comments were added to explain some of the changes or to question wording/function.

Each menu item, in **bold** and **numbered**, precedes its related screen prints and text, and is separated from the previous menu item by a dotted horizontal line.

A menu item has “*changes*” attached to it if changes have been made. A (?) indicates that the changes are questionable.

ADMIN user Home Page _to be done separately

Administrator Home Page
This page provide the starting point for the administrative functions provided for MbrDB.
To have access to this page you must be registered with a user role of 'admin'. Further authorization is required to use the DBJanitor.
Each page on the menu is individually documented to ensure each function is fully explained before being performed.

1. Home—*changes*

Session user logged in: joliaa@mem.net
Security level: admin
Membership Home Page [Logout](#) [Admin](#)
Welcome to the Membership Database System (MbrDB). This page will briefly describe the facilities available for administration of this membership system. Other information is available by clicking the main menu tabs at the top of this page.
The membership database contains all the information regarding the contacts, members, volunteers and donors of the organization. Information contained in this database is not to be sold or shared and is for the exclusive use of the organization.
Access to all the facilities of the system are provided on the main menu located at the top of each page. An individual member's information may be obtained by entering all or the start of the member's unique Member/Contact IDentifier (MCID) in the filter area on the far right. Entry of a blank filter value will provide the option to do a more generalized search of name, address, email or address information.
The membership database is organized using a unique Member/Contact IDentifier (MCID). The MCID is comprised of 3 letters (usually the first 3 letters of the member's last name) and 2 digits (usually the first 2 digits of the member's street address.) When adding a new MCID a check is made to determine if it is unique. If it is not merely add 1 to the last digit or use 2 digit string to make it unique. After an MCID has been successfully entered a data entry page is provided to allow entry of further information regarding the member or contact. That MCID will be used to associate all information pertaining to it.
Administrative functions are provided to authorized users that will allow maintenance of the various functions of the system and its associated database.
Security levels are assigned when a new user is registered. When a user successfully logs in a timed session is established. Inactivity for longer than 15 minutes will automatically log the user out and require a new login session to be established.
GPL License
Membership Database (MbrDB) Copyright (C) 2013 by Pragmatic Computing, Morro Bay, CA
This program comes with ABSOLUTELY NO WARRANTY. This is free software. It may be redistributed under certain conditions. See 'Reports->About MbrDB' for more information.

*[Text below was copied from above screen. Suggested changes and spelling corrections are **highlighted**.]*

Session user logged in: joliaa@mem.net

Security level: admin

Membership Home Page

[Logout](#)

[Admin](#)

Welcome to the Membership Database System (MbrDB). This page will briefly describe the facilities **available** for administration of this membership system. Other **information** is available by clicking the main menu tabs at the top of this page.

The membership database contains all the information regarding the contacts, members, volunteers and donors of the organization: collectively referred to as supporters.. Information contained in this database is not to be sold or shared and is for the exclusive use of the organization.

Access to all the facilities of the system are provided on the main menu located at the top of each page. An individual **supporter's** information may be obtained by entering all or the start of the **supporter's** unique Member/Contact IDentifier (MCID) in the **Lookup box** on the far right. **Leave the Lookup box empty** to do a more generalized search of name, address, city, and email information.

The membership database is organized using a unique Member/Contact IDentifier (MCID). This MCID will be used to access all information pertaining to an individual. The MCID is comprised of 3 letters (usually the first 3 letters of the supporter's last name) and 2 digits (usually the first 2 digits of the supporter's street address or the last 2 digits of the phone number). When adding a new MCID a check is made to determine if it is unique. If it is not merely add 1 to the last digit or use another 2 digit string to make it unique. After an MCID has been successfully entered a data entry page is provided to allow entry of further information regarding the supporter.

Administrative functions, that allow maintenance of the various functions of the system and its associated database, are provided to authorized users.

Security levels are assigned when a new user is registered. A timed session is established when a user successfully logs in. Inactivity for longer than 15 minutes will automatically log the user out and require a new login session to be established.

GPL License

Membership Database (MbrDB) Copyright (C) 2013 by Pragmatic Computing, Morro Bay, CA

This program comes with ABSOLUTELY NO WARRANTY. This is free software. It may be redistributed under certain conditions. See 'Reports->About MbrDB' for more information.

2. Add New Mbr—*changes*

[Entered MCID into box and clicked Add MCID button.]

This function is to add a new member/contact record to the database.

This requires that a unique 5 character Member/Contact Identifier (MCID) be proposed to be used to identify that member.

The MCID is comprise of 3 alphabetic letters (usually the first three letters of the name of the member or organizational name or any organizational acronym) plus 2 numeric digits (usually the first 2 digits of the members street address or the last 2 digits of their phone number). This combination provides a predictable method that facilitates easy lookup for future reference.

Entry of the proposed MCID requires that the format of 3 letters and 2 digits are enforced. Occasionally this will result in duplication of an existing MCID. A list of alternative MCID's are provided in the event that the one proposed is already in use. Merely pick one from the list provided and enter it to complete the process.

Once you have successfully added a new record with a unique MCID for the member you will be presented with a blank input page where the remaining information about the member may be entered.

Provide the EXACT MCID proposed for the new member record to be added:

MCID: Add MCID

[Text below was copied from above screen. Suggested changes and spelling corrections are highlighted.]

Adding A New Member

This function is to add a new supporter record to the database.

This requires that a unique 5 character Member/Contact Identifier (MCID) be proposed to be used to identify that member.

The MCID is comprise of 3 alphabetic letters (usually the first three letters of the supporter's last name or organizational name or any organizational acronym) plus 2 numeric digits (usually the first 2 digits of the supporter's street address or the last 2 digits of their phone number). This combination provides a predictable method that facilitates easy lookup for future reference.

Entry of the proposed MCID requires that the format of 3 letters and 2 digits is enforced. Occasionally this will result in duplication of an existing MCID. A list of alternative MCIDs are provided to choose from in the event that the one proposed is already in use. Merely pick one from the list provided and enter it to complete the process.

Once you have successfully added a new supporter record with a unique MCID for the you will be presented with a blank input page where the remaining information about the supporter may be entered.

Provide the EXACT MCID proposed for the new supporter record to be added:

MCID: Add MCID

[Completed information for new supporter then clicked **Update Member** button.]

[Still not quite sure how to get the city, state, and zip to auto-populate the fields.]

The screenshot shows the 'Member Information for (CAM99)' page. At the top, there's a navigation bar with links like Home, Add New Mbr, Mbr Info, EDInfo, Solicit, Reminders, Reports, MCID, and Lookup. Below the navigation is a toolbar with tabs: Main (selected), Funding, Correspondence, Lists, Summary, and Follow Up. A prominent blue 'Update Member' button is at the top right of the main content area. The 'Contact Information' section contains fields for First Name (Joanne), Last Name (TestMember), Label Line (Joanne TestMember), Organization (Organization), City (Cambria), State (CA), Zip (93428), and Email (Email). The 'Membership Detail' section includes fields for Mbr Status (radio buttons for Contact, Member, Vol, Donor), Date Joined (2015-06-20), Mbr Type (Proposed Member), Email OK? (Yes), Mail OK? (Yes), Mbr Inactive? (Yes), and Date Inactive.

3. Mbr Info—

This screenshot shows the 'Member Information for Joanne TestMember(CAM99)' page. The contact information is identical to the previous screenshot. In the 'Membership Detail' section, the 'Mbr Status' dropdown now shows '3-Donor'. The 'Mbr Type' dropdown shows '0-Proposed Member'. The 'Email OK?' and 'Mail OK?' checkboxes are checked. The 'Mbr Inactive?' dropdown shows 'No' selected.

4. EDInfo—MENU

The screenshot shows the 'EDInfo-MENU' page. At the top, it displays 'Session user logged in: joia' and 'Security level: admin'. Below that is a link to 'Membership Home'. The main content area has a red box highlighting the 'EDI for Active MCID' link. Other links in the menu include 'Add EDI for Active MCID', 'Delete EDI for Active MCID', and 'List All MCIDs with EDI'.

5. EDInfo→EDI for Active MCID—*changes*

[The screen below displays when an MCID has been selected, but there is no EDI for that MCID.]

The screenshot shows a software interface with a navigation bar at the top. The 'MCID' button is highlighted. Below the navigation bar, a message box displays the text: "No EDI available for MCID: AAS47".

[The screen below displays when no MCID has been selected.]

The screenshot shows the 'Extended Donor Information' page. The title is 'Extended Donor Information'. The page contains descriptive text about EDI and instructions for using the MCID Lookup function. It also includes sections for 'Information recorded here' and 'EDI data is information entered to allow fund development activities to be documented when special donors have been identified and further information regarding the donor recorded for organizational historical purposes. All data is addition to that recorded for a 'regular' donor.'

[Text below was copied from above screen. Suggested changes and spelling corrections are **highlighted**.]

Extended Donor Information

This page will display all Extended Donor Information (EDI) previously entered for the active MCID. Use the MCID Lookup function to select a member's MCID to make it 'active'.

Information recorded here is additional to that usually provided for a donor. Please enter all donor funding and contributions on the 'Funding' tab and all contacts made on the 'Correspondence' tab.

EDI data is information entered to allow fund **development** activities to be documented when special donors have been identified and further information regarding the donor recorded for organizational historical purposes. All data is addition to that recorded for a 'regular' donor.

6. EDInfo→Add EDI for Active MCID—*changes*

[Selected EDInfo→Add EDI for Active MCID, but did not have an Active MCID.]

The screenshot shows a confirmation dialog box. The text reads: "This action will add a new EDI Record for Active MCID. Confirm by clicking OK." There are "OK" and "Cancel" buttons at the bottom.

The screenshot shows a message box with the text: "ERROR: Addition of EDI may not be done as there is no active MCID selected."

[Made an MCID Active, via Lookup, and then selected EDInfo→Add EDI for Active MCID.]

[Clicked Usage tab.]

The screenshot shows the 'Extended Donor Information for AAS47' page. The title is 'Extended Donor Information for AAS47'. Below the title, there is a tab navigation bar with 'Usage' selected. The 'Usage' tab contains descriptive text about the tabs and instructions for using them.

[Text below was copied from above screen. Suggested changes and spelling corrections are **highlighted**.]

Extended Donor Information for XXXXX

Usage Personal Education Business Other **Affiliations** Wealth Sources Research By

Information on each of these tabs represents extended research on selected donors and supporters. It is intended that this information be confidential and private for the use of Pacific Wildlife Care only. Any unauthorized use is prohibited.

Each tab is free form in nature. In initial entry of information, specific examples are provided that usually are noted during research. Information placed in each tab may be searched for. The use of 'keywords' is encouraged to facilitate searching for specific information across all donors for which research has been done.

Click the appropriate tab to begin. Updates or edits to information on each tab may be done by clicking the 'UPDATE' button for that tab.

Please enter all donor funding activity on the 'Funding' tab and all contacts made on the 'Correspondence' tab.

[Clicked Personal tab.]

The screenshot shows the 'Personal' tab of the Extended Donor Information for AAS47. The tab bar includes 'Usage', 'Personal' (which is selected), 'Education', 'Business', 'Other Affiliations', 'Wealth Sources', 'Pics & Docs', and 'Research By'. Below the tab bar, there is a section titled 'Info about Spouse, children, parents, siblings, other sig. Relationships' with an 'Update' button. The form fields include: Date of Birth (DOB), Spouse, Spouse DOB, Children, Parents, Siblings, and Other Significant Relationships. All fields are currently empty.

[Clicked Education tab.]

The screenshot shows the 'Education' tab of the Extended Donor Information for AAS47. The tab bar includes 'Usage', 'Personal' (selected), 'Education' (which is selected), 'Business', 'Other Affiliations', 'Wealth Sources', 'Pics & Docs', and 'Research By'. Below the tab bar, there is a section titled 'Info about College, Advanced Degrees, Honorary Degrees' with an 'Update' button. The form fields include: College, Advanced Degrees, and Honorary Degrees. All fields are currently empty.

[Clicked Business tab.]

The screenshot shows the 'Business' tab of the Extended Donor Information for AAS47. The tab bar includes 'Usage', 'Personal', 'Education', 'Business' (selected), 'Other Affiliations', 'Wealth Sources', 'Pics & Docs', and 'Research By'. Below the tab bar, there is a section titled 'Info about Address, position, description, private or public, phone, email' with an 'Update' button. The form fields include: Address, Position, Description, Private or Public, Business Phone, and Email. All fields are currently empty.

[Clicked Other Affiliations tab.]

This screenshot shows the 'Other Affiliations' tab selected in the top navigation bar. The page title is 'Extended Donor Information for AAS47'. Below the tabs, there is a section titled 'Info about Board memberships, nonprofits, political, religious, social groups' with a 'Update' button. The main content area contains fields for 'Board Memberships', 'Non-Profit Affiliations', 'Political Affiliations', 'Religious Affiliations', and 'Social/Fraterna/Benevolent Groups', each with a corresponding text input field.

[Clicked Wealth Sources tab.]

This screenshot shows the 'Wealth Sources' tab selected in the top navigation bar. The page title is 'Extended Donor Information for AAS47'. Below the tabs, there is a section titled 'Info about Salary/annual Income, Stock holdings, Real property, Personal Property, Foundations, Company ownership' with a 'Update' button. The main content area contains fields for 'Income and Income Sources', 'Stock holdings', 'Real property', 'Personal Property', 'Foundations', and 'Company ownership', each with a corresponding text input field.

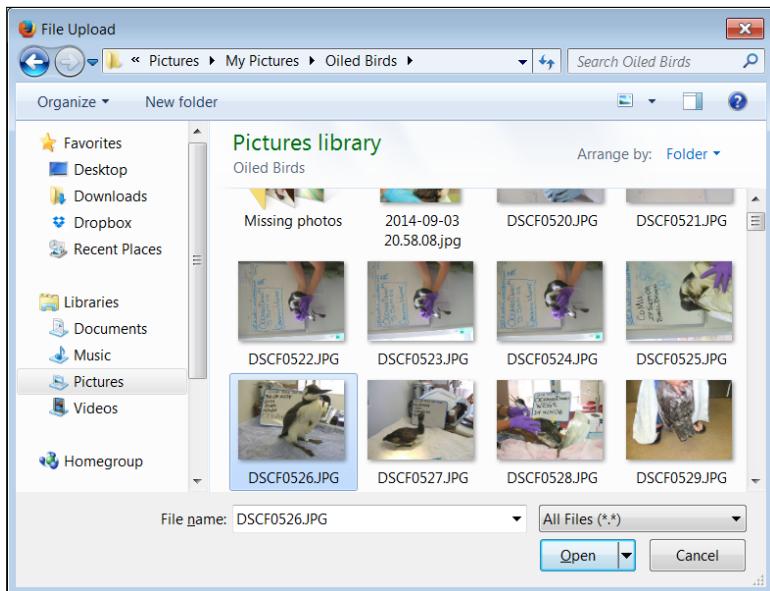
[Clicked Pics & Docs tab then clicked Add new Pic or Doc button.]

This screenshot shows the 'Pics & Docs' tab selected in the top navigation bar. The page title is 'Extended Donor Information for AAS47'. Below the tabs, there is a section titled 'Listing of all related pictures and documents uploaded' with a 'Add new Pic or Doc' button. The main content area displays the message 'No photos or documents available.'

[Clicked Browse... button.]

This screenshot shows the 'EDI Photo Update' page for MCID: AAS47. The page title is 'EDI Photo Update'. It includes a section for 'Extra Donor Info Section: photos'. There is a form with fields for 'Photo Title', 'Notes', 'Filename to upload' (with a 'Browse...' button), and an 'Upload' button. At the bottom left is a 'RETURN' button.

[Browsed to location of pictures I wanted to use, clicked on picture (highlighted), then clicked Open button.]



[Filled in Photo Title and Notes boxes then clicked Upload button.]

Home Add New Mbr Mbr Info EDInfo Solict Reminders Reports MOD Lockup

EDI Photo Update
MCID: AAS47
Extra Donor Info Section: photos

Photo Title: Joanne
Notes: Taken years ago!
Filename to upload:
 DSCF0526.JPG

[A ProgressBar displayed below the Upload button.]

Home Add New Mbr Mbr Info EDInfo Solict Reminders Reports MOD Lockup

EDI Photo Update
MCID: AAS47
Extra Donor Info Section: photos

Photo Title: Joanne
Notes: Taken years ago!
Filename to upload:
 DSCF0526.JPG

ProgressBar

Waiting for www.pacificwildlifecare.org...

[Once the upload was completed a confirmation message displayed in RED at the top of the page.]

[Clicked RETURN button.]

New photo added for MCID: AAS47

EDI Photo Update
MCID: AAS47

Extra Donor Info Section:

Photo Title: _____
Notes: _____
Filename to upload:
Browse... No file selected.

Upload

RETURN

[Clicked Pics & Docs tab.]

Home Add New Mbr Mbr Info EDInfo Solict Reminders Reports MCD Lockup

Extended Donor Information for AAS47

Usage Personal Education Business Other Affiliations Wealth Sources **Pics & Docs** Research By

Information on each of these tabs represent extended research on selected donors and supporters. It is intended that this information be confidential and private for the use of Pacific Wildlife Care only. Any unauthorized use is prohibited.

Each tab is free form in nature. In initial entry of information, specific examples are provided that usually are noted during research. Information placed in each tab may be searched for so the use of keywords is encouraged to facilitate finding specific information across all donors for which research is done.

Click the appropriate tab to begin. Updates or edits to information on each tab may be done by clicking the 'UPDATE' button for that tab.

Please enter all donor funding activity on the 'Funding' tab and all contacts made on the 'Correspondence' tab.

[Recently uploaded picture is now listed at bottom of page.]

[Clicked on camera icon under View.]

Home Add New Mbr Mbr Info EDInfo Solict Reminders Reports MCD Lockup

Extended Donor Information for AAS47

Usage Personal Education Business Other Affiliations Wealth Sources **Pics & Docs** Research By

Listing of all related pictures and documents uploaded.

Add new Pic or Doc

View	Del	Title	Notes
		Joanne	Taken years ago!

[Clicked OK button.]

Home Add New Mbr Mbr Info EDInfo Solict Reminders Reports MCD Lockup

Extended Donor Information for AAS47

Usage Personal Education Business Other Affiliations Wealth Sources **Pics & Docs** Research By

This will open a new window or tab

Confirm this action by clicking OK or CANCEL

OK Cancel

Listing of all related pictures and documents uploaded.

Add new Pic or Doc

View	Del	Title	Notes
		Joanne	Taken years ago!

[Picture is displayed.]

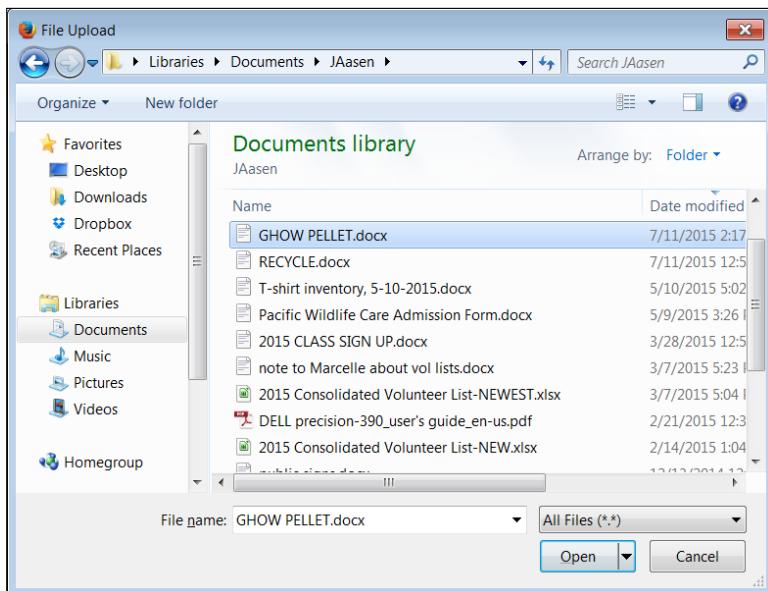


[Closed browser tab AAS47-150711151529.JPG... with picture.]

[Returned to EDI page and clicked on Add new Pic or Doc tab.]

A screenshot of a software application titled 'Extended Donor Information for AAS47'. The interface has a top navigation bar with links like 'Home', 'Add New Mbr', 'Mbr Info', 'EDInfo', 'Solicit', 'Reminders', 'Reports', 'MCD', and 'Lockup'. Below the navigation is a tab bar with 'Usage', 'Personal', 'Education', 'Business', 'Other Affiliations', 'Wealth Sources', 'Pics & Docs' (which is highlighted in blue), and 'Research By'. A message below the tabs says 'Listing of all related pictures and documents uploaded.' There is a button labeled 'Add new Pic or Doc'. The main content area shows a table with two rows. The first row has columns for 'View', 'Del', 'Title', and 'Notes'. The second row shows a user icon, the name 'Joanne', and the note 'Taken years ago!'. The entire window has a light gray background.

[Browsed to location of document, clicked on a document, then clicked on Open button.]



[Clicked on Upload button.]

The screenshot shows the 'EDI Photo Update' page. At the top, there are navigation links: Home, Add New Mbr, Mbr Info, EDInfo, Solicit, Reminders, Reports, MCD, and Lookup. Below these, the title 'EDI Photo Update' and MCID 'AAS47' are displayed. A section titled 'Extra Donor Info Section: photos' contains fields for 'Photo Title', 'Notes', and 'Filename to upload'. A 'Browse...' button is shown with the path 'GHOW PELLET.docx'. Below these fields are 'Upload' and 'RETURN' buttons.

[Error message was displayed because no Photo Title was entered.]

The screenshot shows the same 'EDI Photo Update' page as above, but with an 'OK' dialog box overlaid in the center. The dialog box contains the text 'Photo title must be supplied'. The rest of the page content is dimmed.

[Entered Photo Title and Notes-even though this is a Document.]

[Clicked on Upload button.]

The screenshot shows the 'EDI Photo Update' page again. The 'Photo Title' field now contains 'about the Great Horned Owl pellet'. The 'Notes' field contains 'for Kathy Duncan'. The 'Filename to upload' field still shows 'GHOW PELLET.docx'. The 'Upload' and 'RETURN' buttons are visible at the bottom.

[File is uploaded and a confirmation message is displayed at top of page.]

[Clicked RETURN button.]

The screenshot shows the 'EDI Photo Update' page. A confirmation message 'New photo added for MCID: AAS47' is displayed at the top. The 'Photo Title' field is empty, and the 'Notes' field is empty. The 'Filename to upload' field shows 'No file selected.' The 'Upload' and 'RETURN' buttons are at the bottom.

[Clicked Pics & Docs tab.]

Home Add New Mbr Mbr Info EDInfo Solict Reminders Reports MCD Lockup

Extended Donor Information for AAS47

Usage Personal Education Business Other Affiliations Wealth Sources Pics & Docs Research By

Information on each of these tabs represent extended research on selected donors and supporters. It is intended that this information be confidential and private for the use of Pacific Wildlife Care only. Any unauthorized use is prohibited.

Each tab is free form in nature. In initial entry of information, specific examples are provided that usually are noted during research. Information placed in each tab may be searched for so the use of 'keywords' is encouraged to facilitate finding specific information across all donors for which research is done.

Click the appropriate tab to begin. Updates or edits to information on each tab may be done by clicking the 'UPDATE' button for that tab.

Please enter all donor funding activity on the 'Funding' tab and all contacts made on the 'Correspondence' tab.

[Clicked the camera icon to left of "about the...".]

Home Add New Mbr Mbr Info EDInfo Solict Reminders Reports MCD Lockup

Extended Donor Information for AAS47

Usage Personal Education Business Other Affiliations Wealth Sources Pics & Docs Research By

Listing of all related pictures and documents uploaded.

Add new Pic or Doc

View	Del	Title	Notes
		Joanne	Taken years ago!
		about the Great Horned Owl pellet	for Kathy Duncan

[Clicked OK button.]

This will open a new window or tab.
Confirm this action by clicking OK or CANCEL

OK Cancel

View	Del	Title	Notes
		Joanne	Taken years ago!
		about the Great Horned Owl pellet	for Kathy Duncan

[Double-clicked on file AAS47-15071115223.docx.]

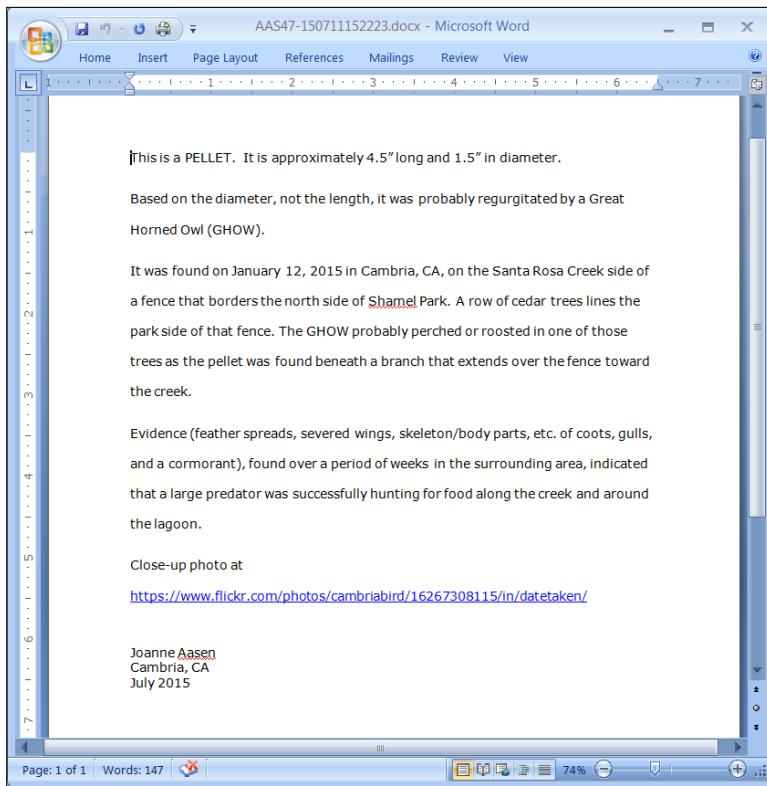
[NOTE]: document was uploaded into the Downloads folder and that may be a problem. Should there be a mechanism to let the user select where to store the file being uploaded? Not sure of the intent of this document function. Where is the picture saved? Shouldn't the document be saved in the same place? On the server with the database?]

PWC User > Downloads

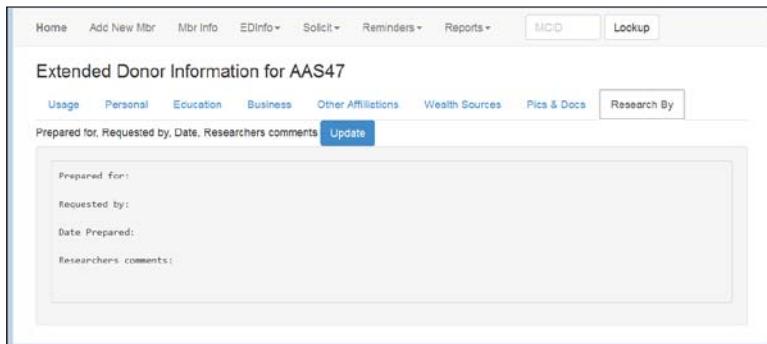
Name	Date modified	Type
AAS47-15071115223.docx	7/11/2015 3:23 PM	Office Open XML Document
homecare_11-07-2015_1436649871.pdf	7/11/2015 2:24 PM	Adobe Acrobat Document
homecare_11-07-2015_1436649842.pdf	7/11/2015 2:24 PM	Adobe Acrobat Document
homecare_11-07-2015_1436649776.pdf	7/11/2015 2:23 PM	Adobe Acrobat Document
homecare_11-07-2015_1436649748.pdf	7/11/2015 2:22 PM	Adobe Acrobat Document
intake_form_11-07-2015_1436640094.pdf	7/11/2015 11:41 AM	Adobe Acrobat Document
intake_form_11-07-2015_1436639782.pdf	7/11/2015 11:36 AM	Adobe Acrobat Document
intake_form_11-07-2015_1436638124.pdf	7/11/2015 11:08 AM	Adobe Acrobat Document
intake_form_11-07-2015_1436638097.pdf	7/11/2015 11:08 AM	Adobe Acrobat Document
intake_form_11-07-2015_1436637551.pdf	7/11/2015 10:59 AM	Adobe Acrobat Document
intake_form_11-07-2015_1436637529.pdf	7/11/2015 10:58 AM	Adobe Acrobat Document
intake_form_11-07-2015_1436636889.ndf	7/11/2015 10:48 AM	Adobe Acrobat Document

AAS47-15071115223.docx State: Shared
Office Open XML Document Title: Add a title

[Closed the MSWord file.]

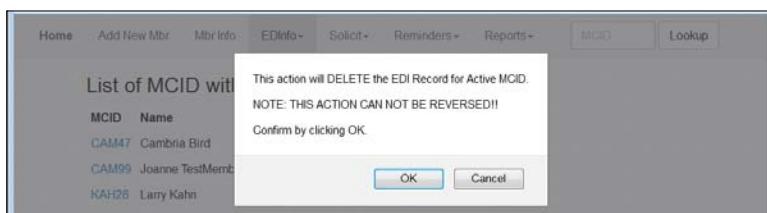


[Clicked Research By tab.]



7. EDInfo→Delete EDI for Active MCID—changes(?)

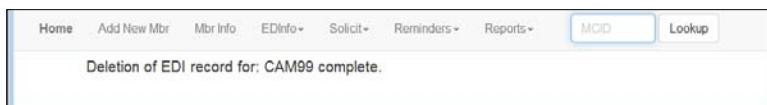
[Clicked OK button.]



[Deletes the EDI information for the ACTIVE MCID.]

[Suggest that the **actual active MCID** (e.g., **AAS47**) be displayed in the popup warning message above, instead of "...for Active MCID," so that there is visual confirmation of what MCID is about to be deleted.]

[**QUESTION:** Should there be a RETURN or CLOSE button in the following two pages?]



Home Add New Mbr Mbr Info EDInfo+ Solicit+ Reminders+ Reports+ MCID Lookup

There is no Extended Donor Info for MCID CAM99

8. EDInfo→List all MCIDs with EDI—

Home Add New Mbr Mbr Info EDInfo+ Solicit+ Reminders+ Reports+ MCID Lookup

List of MCID with EDI Records

MCID	Name	Date Entered	Last Updated	Last Updater
CAM47	Camibia Bird	2015-04-22	2015-04-22	jolaa@mern.net
CAM99	Joanne TestMember	2015-06-20	2015-06-20	jolaa@mern.net
KAH28	Larry Kahn	2015-01-11	2015-01-11	websiteink@gmail.com
LIP16	Michael Lipari	2015-01-11	2015-01-11	websiteink@gmail.com
WAD81	D. Kathleen Wadden	2014-03-01	2014-03-01	drkwaddell@yahoo.com

9. Solicit—MENU

[Although this feature is not used at this time by PWC it is still useful to correct text prior to it being used in the future.]

Home Add New Mbr Mbr Info EDInfo+ Solicit+ Reminders+ Reports+ MCID Lookup

Deletion of EDI record for: CAM47

- Calling Scripts
- Credit Card Payment
- PayPal Payment
- Payment Confirmation

10. Solicit→Calling Scripts—*changes*

[Clicked Usage tab.]

Solicitation Information **(CLOSE)**

Usage Org Info Opening Comments Funding Options Payment Options Decline Counters Last Words

This page is to provide all available scripts developed for use by the phone solicitation person to be used during the course of a conversation with the active MCID. Use the 'MCID Lookup' function of the main menu to establish an 'active' MCID. Contact information about the 'active' MCID is available on the Info tab of the main menu. Funding and Correspondence tabs provide historical funding support and member contact information.

Various scripts are developed, usually, by professional Fund Development staff. Once approved, they are loaded into the system and become available on the various tabs of this page. Techniques on phone protocols, questions, tone of voice and other non-visual indicators will largely determine the success or failure of phone solicitation efforts. These scripts must be developed with an understanding of these factors.

In general, each tab is free form in nature. Loading of information for each tab is done after it has been developed and trial tested within the organization. Special system administration functions are provided to allow these scripts to be loaded when they have been developed or updated.

This page opens up as a separate tab or window. All scripts are a part of the page downloaded so that navigation between them is very fast. Click the appropriate tab to begin.

Please enter all donor funding activity on the 'Funding' tab and all contacts made on the 'Correspondence' tab.

[Text below was copied from above screen. Suggested changes and spelling corrections are highlighted.]

Solicitation Information

(CLOSE)

Usage Org Info Opening Comments Funding Options Payment Options Decline Counters Last Words

This page is to provide all available scripts developed for use by the phone **solicitation** person to be used during the course of a conversation with the active MCID. Use the 'MCID Lookup' function of the main menu to **establish** an 'active' MCID. Contact **information** about the 'active' MCID is available on the Info tab of the main menu. Funding and Correspondence tabs provide historical funding support and member contact information.

Various scripts are developed, usually, by professional Fund Development staff. Once approved, they are then loaded into the system and become available on the various tabs of this page. Techniques on phone protocols, questions, tone of voice and other non-visual indicators will largely determine the success or failure of phone solicitation efforts. These scripts must be developed with an understanding of these factors.

In general, each tab is free form in nature. Loading of information for each tab is done after it has been developed and trial tested within the organization. Special system administration functions are provided to allow these scripts to be loaded when they are have been developed or updated.

This page opens up as a **separate** tab or window. All scripts are a part of the page downloaded so that navigation between them is very fast. Click the appropriate tab to begin.

Please enter all donor funding activity on the 'Funding' tab and all contacts made on the 'Correspondence' tab.

[Clicked Org Info tab.]

Solicitation Information **(CLOSE)**

Usage Org Info Opening Comments Funding Options Payment Options Decline Counters Last Words

Information like:

Mission Statement:
Organizational Goals:
Accomplishments:

[Text below was copied from above screen. Suggested changes and spelling corrections are highlighted.]

Solicitation Information **(CLOSE)**

Usage Org Info Opening Comments Funding Options Payment Options Decline Counters Last Words

Information like:

Mission Statement:

Organizational Goals:

Accomplishments:

[Clicked Opening Comments tab.]

Solicitation Information **(CLOSE)**

Usage Org Info Opening Comments Funding Options Payment Options Decline Counters Last Words

Greeting and opening comments

- Note and thank you for past support
- Noticed that the membership dues has expired.
- Are you interested in continuing to support the organization?
- Would it be possible to increase you membership amount to the next level?
- Can I assist in setting up a continuing, subscription membership with you?

[Text below was copied from above screen. Suggested changes and spelling corrections are highlighted.]

Solicitation Information **(CLOSE)**

Usage Org Info Opening Comments Funding Options Payment Options Decline Counters Last Words

Greeting and opening comments

- Note and thank you for past support
- Noticed that the membership dues has expired.
- Are you interested in continuing to support the organization?
- Would it be possible to increase you membership amount to the next level?
- Can I assist in setting up a continuing, subscription membership with you?

[Clicked Funding Options tab.]

Solicitation Information **(CLOSE)**

Usage Org Info Opening Comments **Funding Options** Payment Options Decline Counters Last Words

Description of various ways that funding support can be provided:

- Annual membership dues
- Annual or periodic donations
- Scheduled or subscription dues or donations
- Directed donations for specific projects or use
- In-kind donations for equipment, food or consumable goods on the 'wish' list
- Volunteering of time on a assignment or scheduled basis
- Participating in orginazational committees (Board, Events, Membership, Fund Raising, Volunteer, etc.)

[Text below was copied from above screen. Suggested changes and spelling corrections are highlighted.]

Solicitation Information **(CLOSE)**

Usage Org Info Opening Comments Funding Options Payment Options Decline Counters Last Words

Description of various ways that funding support can be provided:

- Annual membership dues
- Annual or periodic donations

- Scheduled or subscription dues or donations
- Directed donations for specific projects or use
- In-kind donations for equipment, food or consumable goods on the 'wish' list
- Volunteering of time on a assignment or scheduled basis
- Participating in organizational committees (Board, Events, Membership, Fund Raising, Volunteer, etc.)

[Clicked Payment Options tab.]

Solicitation Information **(CLOSE)**

Usage Org Info Opening Comments Funding Options **Payment Options** Decline Counters Last Words

Payment options include:

- On-line membership payment or donation on our web site or through PayPal
- Setting up an automatic payment with your bank (would you like more information?)
- Sending a check or money order directly (would you like the address or have me send a self addressed return remittance envelope?)

[Text below was copied from above screen. Suggested changes and spelling corrections are highlighted.]

Solicitation Information **(CLOSE)**

Usage Org Info Opening Comments Funding Options **Payment Options** Decline Counters Last Words

Payment options include:

- On-line membership payment or donation on our web site or through PayPal
- Setting up an automatic payment with your bank (would you like more information?)
- Sending a check or money order directly (would you like the address or have me send a self addressed return remittance envelope?)

[Clicked Decline Counters tab.]

Solicitation Information **(CLOSE)**

Usage Org Info Opening Comments Funding Options **Payment Options** **Decline Counters** Last Words

Counters to declinations:

- Would you like to continue to receive periodic information and mailers from the organization?
- Would it be OK for us to contact you in the future?
- Are you interested in learning about our special educational or fund raising events?
-

[Text below was copied from above screen. Suggested changes and spelling corrections are highlighted.]

Solicitation Information **(CLOSE)**

Usage Org Info Opening Comments Funding Options **Payment Options** Decline Counters Last Words

Counters to declinations:

- Would you like to continue to receive periodic information and mailers from the organization?
- Would it be OK for us to contact you in the future?
- Are you interested in learning about our special educational or fund raising events?
-

[Clicked Last Words tab.]

Solicitation Information **(CLOSE)**

Usage Org Info Opening Comments Funding Options **Payment Options** Decline Counters **Last Words**

Final Words

Suggestions on how to close the call:

- Thank you for your continued support.
-

[Text below was copied from above screen. Suggested changes and spelling corrections are highlighted.]

Solicitation Information **(CLOSE)**

Usage Org Info Opening Comments Funding Options **Payment Options** Decline Counters Last Words

Final Words

Suggestions on how to close the call:

- Thank you for your continued support.

11. **Solicit→Credit Card Payment—**

Home Add New Mbr Mbr Info EDInfo+ Solicit+ Reminders+ Reports+ MCID Lookup
Display of credit card interface and data entry page

12. **Solicit→PayPal Payment—**

Home Add New Mbr Mbr Info EDInfo+ Solicit+ Reminders+ Reports+ MCID Lookup
Display of PayPal credit card interface and data entry page

13. **Solicit→Payment Confirmation—**

Home Add New Mbr Mbr Info EDInfo+ Solicit+ Reminders+ Reports+ MCID Lookup
Display of payment confirmation entry forms.

14. **Reminders—MENU**

[Detail documentation on this feature is being prepared separately.]

Home Add New Mbr Mbr Info EDInfo+ Solicit+ Reminders+ Reports+ MCID Lookup
Session user logged in: joliaa@memb.net
Security level: admin
Membership Home Page Logout
Display Expired
Print Labels and Letters
In-Progress Reminders
Reminders Explained
Welcome to the Membership Database System (MbrDB). This page will briefly describe the facilities available for

15. **Reminders→Display Expired—*[refer to separate documentation]***

[Selected 1-Member from drop-down list at top left.]

Home Add New Mbr Mbr Info EDInfo+ Solicit+ Reminders+ Reports+ MCID Lookup
1-Member Latest First
List of 96 Members with expired memberships
Notices sent since 2015-05-22 00:00:00 not listed.

MCID	Name	EMail?	Mail?	Last Paid	Amount	Purpose	Inactive?	Rem Cnt	LastReminder	RemType
G0076	Laura Goodwin			2014-06-15	\$50.00	Dues				
DAN11	Ruth Danielson			2014-05-30	\$40.00	Dues		1	2015-05-07	MailReminder
REE21	Susan M. Reese			2014-05-27	\$100.00	Dues		1	2015-05-07	MailReminder
DST13	Anna Ostovari			2014-05-26	\$50.00	Dues		1	2015-05-07	EmailReminder
LOE52	Dara & Jay Loepke			2014-05-25	\$40.00	Dues		1	2015-05-07	EmailReminder
JOY18	Marcia Joyce			2014-05-25	\$25.00	Dues		1	2015-05-07	EmailReminder
GAL56	Mary Galvin			2014-05-25	\$100.00	Dues		1	2015-05-07	MailReminder
GUJ64	Joann Glidden			2014-05-24	\$150.00	Dues		1	2015-05-07	MailReminder
PAR63	Joyce Pardue			2014-05-22	\$0.00	Dues		1	2015-05-07	EmailReminder

[Selected 2-Volunteer from drop-down list at top left.]

List of 48 Volunteers with expired memberships								
MCID	Name	EMail?	Mail?	Last Paid	Amount	Purpose	Inactive?	Rem Cnt.
BIS47	Sandra Bishop	<input type="checkbox"/>	<input type="checkbox"/>	2014-06-30	\$50.00	Dues	<input type="checkbox"/>	
HER74	Donna Herbst	<input type="checkbox"/>	<input type="checkbox"/>	2014-06-26	\$100.00	Dues	<input type="checkbox"/>	
WL18	Elsie Wilcox	<input type="checkbox"/>	<input type="checkbox"/>	2014-06-24	\$25.00	Dues	<input type="checkbox"/>	
EVA52	Becky Evans	<input type="checkbox"/>	<input type="checkbox"/>	2014-06-17	\$25.00	Dues	<input type="checkbox"/>	
CAR28	Wendi Carducci	<input type="checkbox"/>	<input type="checkbox"/>	2014-06-17	\$25.00	Dues	<input type="checkbox"/>	
BAL18	Dianna Ballard	<input type="checkbox"/>	<input type="checkbox"/>	2014-06-17	\$25.00	Dues	<input type="checkbox"/>	
SIM20	Jeri Simmons	<input type="checkbox"/>	<input type="checkbox"/>	2014-06-11	\$35.00	Dues	<input type="checkbox"/>	
DAW34	Dianna Dawson	<input type="checkbox"/>	<input type="checkbox"/>	2014-06-09	\$25.00	Dues	<input type="checkbox"/>	
SCH94	Summer Schlageter	<input type="checkbox"/>	<input type="checkbox"/>	2014-06-08	\$25.00	Dues	<input type="checkbox"/>	
LYT38	Suzanne Lysell	<input type="checkbox"/>	<input type="checkbox"/>	2014-05-30	\$100.00	Dues	<input type="checkbox"/> 2	2015-05-10 EmailReminder
BUT72	Anna Butler	<input type="checkbox"/>	<input type="checkbox"/>	2014-05-25	\$25.00	Dues	<input type="checkbox"/> 2	2015-05-10 EmailReminder
WL98	TerryAnn	<input type="checkbox"/>	<input type="checkbox"/>	2014-05-22	\$0.00	Dues	<input type="checkbox"/> 2	2015-05-10 EmailReminder

[Selected 3-Donor from drop-down list at top left.]

List of 166 Donors without recent funding support								
MCID	Name	EMail?	Mail?	Last Paid	Amount	Purpose	Inactive?	Rem Cnt.
CHR21	Amy Christey	<input type="checkbox"/>	<input type="checkbox"/>	2014-06-26	\$20.00	Donation	<input type="checkbox"/>	
RAT65	Annette Rathbun	<input type="checkbox"/>	<input type="checkbox"/>	2014-06-24	\$15.00	Donation	<input type="checkbox"/>	
DAL13	Jean Dalcerri	<input type="checkbox"/>	<input type="checkbox"/>	2014-06-24	\$20.00	Donation	<input type="checkbox"/>	
ARE99	Candy Arend	<input type="checkbox"/>	<input type="checkbox"/>	2014-06-23	\$20.00	Donation	<input type="checkbox"/>	
WOL17	Diana Wolf	<input type="checkbox"/>	<input type="checkbox"/>	2014-06-22	\$10.00	Donation	<input type="checkbox"/>	
MAR10	Roxanna Martinez	<input type="checkbox"/>	<input type="checkbox"/>	2014-06-21	\$20.00	Donation	<input type="checkbox"/>	
WAL17A	Patrick & Carolyn Wallen	<input type="checkbox"/>	<input type="checkbox"/>	2014-06-20	\$20.00	Donation	<input type="checkbox"/>	
ROG93	Cathy Rogers	<input type="checkbox"/>	<input type="checkbox"/>	2014-06-18	\$20.00	Donation	<input type="checkbox"/>	
TYR38	Dawn Tyra	<input type="checkbox"/>	<input type="checkbox"/>	2014-06-17	\$10.00	Donation	<input type="checkbox"/>	
ASZ39	Rod Aszman	<input type="checkbox"/>	<input type="checkbox"/>	2014-06-17	\$25.00	Dues	<input type="checkbox"/>	

16. Reminders→Print Labels and Letters—*changes*

[If there are 0 entries in the Labels and Letters List this page will display.]

Labels and Letters List								
There are currently 0 in the Letters and Labels List.								
This list is created and added to when a membership subscription has expired and a letter or post card reminder mailing has been initiated. The list contains all the information required to print either formatted page(s) of labels and/or the form letter designated from an existing template.								
Please note that printing labels is best done when using the Chrome web browser. Other browsers may be used but careful testing must be done BEFORE trying to print on label stock. In any case, make sure that browser margin settings are correctly set in any case.								
Once the labels and letters have been printed they can (and should be) eliminated from the letters and letters database list so that duplicate mailings will be avoided.								
After printing, you may delete any or all of list items by placing a check in the associated box and clicking the 'Delete Items' button.								

[Text below was copied from above screen. Suggested changes and spelling corrections are **highlighted**.]

Labels and Letters List

There are currently 0 entries in the Labels and Letters List.

This list is created and added to when a membership subscription has expired and a letter or post card reminder mailing has been initiated. The list contains all the information required to print either formatted page(s) of labels and/or the form letter designated from an existing template.

Please note that printing labels is best done when using the Chrome web browser. Other browsers may be used but careful testing must be done BEFORE trying to print on label stock. In any case, make sure that browser margin settings are correctly set in any case.

Once the labels and letters have been printed, and to avoid duplicate mailings, those entries should be deleted from the Labels and Letters List.

After printing, you may delete any or all of list items by clicking the LIST AND DELETE LABELS/LETTERS button.

[If there are entries in the Labels and Letters List the following page will display.]

[Selected Renewal Reminder Letter from the drop-down list.]

The screenshot shows a software interface for managing membership mail notices. At the top, there are navigation links: Home, Add New Mbr, Mbr Info, EDInfo, Solicit, Reminders, Reports, and buttons for MCD and Lookup. Below this, the title 'Membership Mail Notice' is displayed. A 'Send Mail Reminders' button is followed by a 'RETURN' link. A dropdown menu titled 'Select a letter template from the selection list:' shows 'Label Only' and 'Renewal Reminder Letter' (which is highlighted). Other options like 'CAM47 Cambria Bird' are also listed. A 'Submit' button is at the bottom.

[Clicked the Submit button.]

This screenshot shows the same software interface after the 'Submit' button was clicked. The 'Renewal Reminder Letter' option is still selected in the dropdown. The 'to send to:' field now contains two checked items: 'CAM99 Joanne TestMember' and 'CAM47 Cambria Bird'. The 'Submit' button is visible at the bottom.

[Clicked the Submit button.]

This screenshot shows the 'Edit Subject and Message' page for the 'Renewal Reminder Letter'. The subject field contains 'Renewal Reminder Letter'. The message area starts with a greeting: 'Greetings from Pacific Wildlife Care.' It explains that past support has been valuable and encourages renewing through a subscription or annual membership. It highlights the Pacific Wildlife Care's ability to provide rescue, rehabilitation, and release services. The message then states that if no response is received, further notifications will be sent via website and social media. It offers two renewal options: 'Subscribing Member' (monthly dues via credit card or PayPal) and 'Annual Membership Levels' (choose from Patron, Sponsor, Contributor, Supporter, or Advocate levels, each with specific benefits like invites to events or newsletters). It provides instructions for payment via mail or online, and notes that checks can be dropped off at the Rehab Center. The message concludes with thanks to Marcelle Bakula, Membership Chair, and ends with a 'Submit' button.

[Clicked the RETURN button.]

Labels and Letters Update

This confirms that all the request to add the members listed to the 'labelsandletters' table has been completed, individual entries made to each members correspondence logs and the member records update with these actions. Use 'Reminders->Print Labels and Letters' to print these items.

CAM99, CAM47,

RETURN

[Text below was copied from above screen. Suggested changes and spelling corrections are highlighted.]

Labels and Letters Update

This confirms that all the requests to add the members listed to the 'labelsandletters' table has been completed, individual entries were made to each member's correspondence log and the member records were updated with these actions. Use 'Reminders > Print Labels and Letters' to print those items.

This confirms that the following has been done for each MCID listed:

- added to 'labelsandletters' table,
- correspondence log updated, and
- member record updated.

Click RETURN button to continue to the printing of labels and/or letters.

Or, use 'Reminders->Print Labels and Letters' to print these items.

[Clicked the SUBMIT button under Print Form Letters.]

Labels and Letters List

There are currently 2 in the Labels and Letters List.

This list is created and added to when a membership subscription has expired and a letter or post card reminder mailing has been initiated. The list contains all the information required to print either formatted page(s) of labels and/or the form letter designated from an existing template.

Please note that printing labels is best done when using the Chrome web browser. Other browsers may be used but careful testing must be done BEFORE trying to print on label stock. Make sure that browser margin settings are correctly set in any case.

Once the labels and letters have been printed they can (and should be) eliminated from the letters and letters database list so that duplicate mailings will be avoided.

After printing, you may delete any or all of list items by placing a check in the associated box and clicking the 'Delete Items' button.

CLICK TO LIST AND DELETE LABELS/LETTERS

Print Labels

This facility allows the creation of a page formatted as printing labels based on the criteria selected. All labels will be sorted by zip code in ascending sequence.

Clicking 'SUBMIT' will open a new window with the labels ready for printing. Click 'CLOSE' to close the window when printing has been completed.

Before printing labels, use Chrome's print function (File -> Print options to set the top margin of to 0.6 inch and all other print margins to 0 (zero).

Try printing a test page on plain paper first. Hold it up to the light behind a sheet of letterhead to make sure the printed labels line up with the blank labels.

Number of labels to skip on 1st page (max: 20):

Include letterhead image in output?

Submit

Print Form Letters

This facility allows the creation of a formatted letter printer ready for letterhead or regular paper.

Clicking 'SUBMIT' will open a new window with the all the letters displayed. Click 'CLOSE' to close the window when printing has been completed.

Before printing the letters, use your browser's print preview (File -> Print Preview) options to set the top print margin of to 0.5 inch and all other print margins to 0 (zero).

Try printing a test letter page on plain paper first. Hold it up to the light behind a sheet of letterhead to make sure the printed letters lines up with the margins.

Include letterhead image in output?

Submit

[Text below was copied from above screen. Suggested changes and spelling corrections are highlighted.]

Labels and Letters List

There are currently 2 in the **Labels and Letters List**.

This list is created and added to when a membership subscription has expired and a letter or post card reminder mailing has been initiated. The list contains all the information required to print either formatted page(s) of labels and/or the form letter designated from an existing template.

Please note that printing labels is best done when using the Chrome web browser. Other browsers may be used but careful testing must be done BEFORE trying to print on label stock. In any case, make sure that browser margin settings are correctly set in any case.

Once the labels and letters have been printed, and to avoid duplicate mailings, those entries should be deleted from the Labels and Letters List.

After printing, you may delete any or all of list items by **clicking the LIST AND DELETE LABELS/LETTERS** button.

CLICK TO LIST AND DELETE LABELS/LETTERS

Print Labels

This facility allows the creation of a page formatted as printing labels based on the criteria selected. All labels will be sorted by zip code in ascending sequence.

Clicking 'SUBMIT' will open a new window with the labels displayed for printing. Click 'CLOSE' to close the window when printing has been completed

Before printing labels, use Chrome's print function (File -> Print) options to set the **top margin of to 0.6 inch and all other print margins to 0 (zero)**.

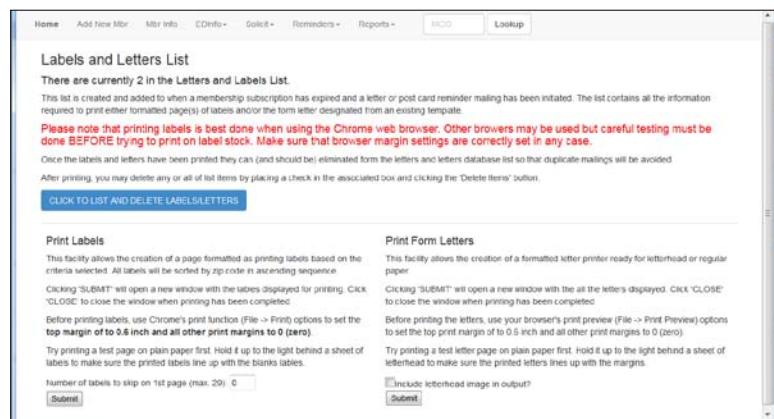
Try printing a test page on plain paper first. Hold it up to the light behind a sheet of labels to make sure the printed labels line up with the blanks labels.

Number of labels to skip on 1st page (max. 29):

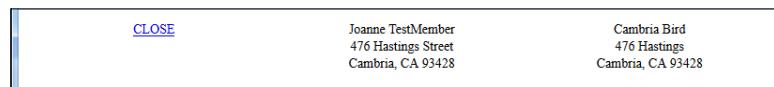
[Printed letters then clicked on the CLOSE link.]



[Clicked the SUBMIT button under Print Labels.]



[Printed labels then clicked on the CLOSE link.]



Print Form Letters

This facility allows the creation of a formatted letter printer ready for letterhead or regular paper.

Clicking 'SUBMIT' will open a new window with the all the letters displayed. Click 'CLOSE' to close the window when printing has been completed

Before printing the letters, use your browser's print preview (File -> Print Preview) options to set the top print margin of to 0.6 inch and all other print margins to 0 (zero).

Try printing a test letter page on plain paper first. Hold it up to the light behind a sheet of letterhead to make sure the printed letters lines up with the margins.

Include letterhead image in output?

[Clicked on **CLICK TO LIST AND DELETE LABELS/LETTERS** button.]

The screenshot shows a software interface for managing labels and letters. At the top, there are tabs for Home, Add New Mbr, Mbr Info, EDInfo, Solicit, Reminders, Reports, MCID, and Lookup. Below the tabs, a section titled "Labels and Letters List" displays a message: "There are currently 2 in the Letters and Labels List." It includes instructions for printing labels and letters, noting that the list contains all information required to print either multiple pages of labels or the form letter designated from an existing template. A note states: "Please note that printing labels is best done when using the Chrome web browser. Other browsers may be used but careful testing must be done BEFORE trying to print on label stock. Make sure that browser margin settings are correctly set in any case." Below this, there's a note about eliminating items from the database list to avoid duplicates. A blue button labeled "CLICK TO LIST AND DELETE LABELS/LETTERS" is prominently displayed. To the right, there are sections for "Print Labels" and "Print Form Letters", each with detailed instructions and a "Submit" button.

[Checked MCIDs to be deleted from the Labels and Letters List then clicked the Delete Checked button.]

The screenshot shows a list of items in the Labels and Letters list. The title is "Items in Labels and Letters list:". There is a checkbox labeled "Check/Uncheck All". Below it is a table with columns: Del, RecNo, Date, MCID, and To. Two rows are shown, both with the "Del" column checked. A "Delete Checked" button is at the bottom. The interface is identical to the one in the previous screenshot.

17. Reminders→In-Progress Reminders—*changes*

The screenshot shows the "In-progress Reminders" page. The title is "In-progress Reminders" with a "CLOSE" button. It lists "Listing of 209 MCIDs:" and provides a detailed description of what MCIDs are. It then lists 209 MCIDs in a table with columns: MCID, Name, MemStatus, Count, Last Sent, and Type Sent. The table includes entries for BIR49, SMA11, HAR20, FAI80, CHA10, HIL56, LAM185, and TOD17.

MCID	Name	MemStatus	Count	Last Sent	Type Sent
BIR49	Daniel Birkbeck	1	6	2015-04-12	MailReminder
SMA11	Betty Smay	1	6	2015-04-12	MailReminder
HAR20	Beverly Harben	1	5	2015-04-12	MailReminder
FAI80	Larry Fairbanks	1	5	2015-04-12	MailReminder
CHA10	Robin Chapman	1	5	2015-04-12	MailReminder
HIL56	Catherine Hillman	1	5	2015-04-12	MailReminder
LAM185	Amanda Lambert	1	5	2015-04-12	MailReminder
TOD17	Dr. Brandon Todd	2	5	2015-04-12	EmailReminder

[Text below was copied from above screen. Suggested changes and spelling corrections are **highlighted**.]

In-progress Reminders [CLOSE]

Listing of 209 MCIDs:

The MCIDs listed are those members and volunteers that have been sent reminders. The listing provides the sorted total count of reminders that have been sent as well as the date of the last one. An MCID will be removed from this list when one of the following occurs:

1. A funding payment is received and entered as a 'Dues' payment (or a donation for a 3-Donor),
2. The member or volunteer record is marked as 'Inactive' or donation
3. The status of the member or volunteer record is marked as '0-Contacts'.

18. Reminders→Reminders Explained—*[refer to separate documentation]*

[This section is covered in a separate document.]

19. Reports—MENU

The screenshot shows the 'Membership Home Page' with a 'Logout' button and a red 'Admin' button. The 'Reports' menu is open, displaying various report options:

- Funding Paid Report
- Print Labels on Criteria
- Membership Drill Down Report
- New Supporters by Date Range
- Membership Exception Report
- Subscribing Members Report
- Correspondence Drill Down
- Transaction Log Report
- Inactive MCID Report
- Mail Log Viewer
- LYBUNTY Report
- SYBUNTY Report
- Monthly Report
- About MbrDB

At the bottom of the page, there is a note about the database being unique and a link to the website.

20. Reports→Funding Paid Report—changes

[Entered selection criteria then clicked Submit Query button.]

The screenshot shows the 'Funding Paid Report' configuration window with a '(CLOSE)' button. It contains the following text and fields:

This report lists all records that would be used for by the 'Print Labels on Criteria' for printing labels based on the criteria selected. The output is sorted by Total amount in descending sequence.

Select one or more of the following criteria:

- 0-Contacts, or
 - 1-Members, or
 - 2-Volunteers, or
 - 3-Donors
AND
 - Exclude those with email addresses
 - Funding Date Range is from: 2015-06-01 and/or before: 2015-06-30
 - Total Funding Range : Low Amount and/or : High Amount

[Text below was copied from above screen. Suggested changes and spelling corrections are highlighted.]

Funding Paid Report (CLOSE)

This report lists all records that would be used for by the 'Print Labels on Criteria' for printing labels based on the criteria selected. The output is sorted by Total amount in descending sequence.

Select one or more of the following criteria:

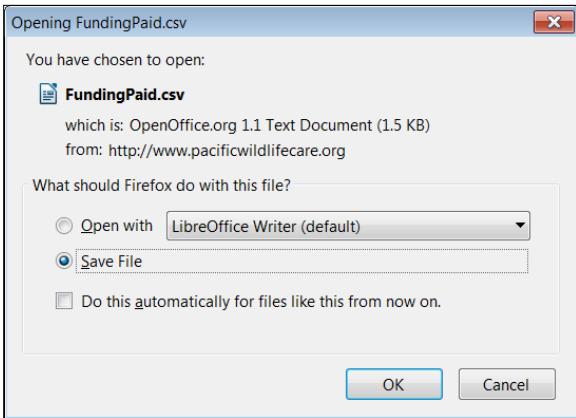
- 0-Contacts, or
 - 1-Members, or
 - 2-Volunteers, or
 - 3-Donors
AND
 - Exclude those with email addresses
 - Funding Date Range is from: 2015-06-01 and/or before: 2015-06-30
 - Total Funding Range : and/or :
-

[Clicked DOWNLOAD CSV FILE link.]

The screenshot shows the 'Funding Report Results' table with a 'CLOSE' button. The table includes columns: MCID, MemStatus, Total, Name, Phone, Email?, Email, Mail?, Address, City/St/Zip, Notes, and a 'DOWNLOAD CSV FILE' link.

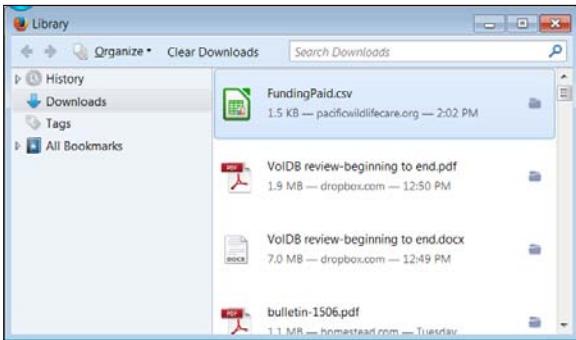
MCID	MemStatus	Total	Name	Phone	Email?	Email	Mail?	Address	City/St/Zip	Notes
ZAE48	1	100.00	Celia Zentz		No		Yes	633 Ramona Ave. #103	Los Osos, CA, 93402-2173	Note: 12/09 sent raccoon pkt.
CAN52	1	50.00	Monica Cantu & Carlie Sindt	818-497-1132	No		Yes	5250 Deer Creek Way	Paso Robles, CA, 93446-9206	Note: '13 animal resc. Donation
PES35	1	50.00	Linda & Darrell Pester	805-239-9483	No		Yes	3620 Creston Rd.	Paso Robles, CA, 93446	Note: requested non-membership one-time donation only 8/15 used newsletter form to renew
DUN12	1	46.00	James W. Duncan		No		Yes	1269 B 6th St	Los Osos, CA, 93402	
KOR46	1	35.00	Margaret Konishelli	805-772-7666	No		Yes	468 Piney Hwy	Morro Bay, CA,	email (korish@thegrid.net) has arrived!

[Checked Save File then clicked OK button.]



[File is initially saved in the Downloads folder.]

[NOTE]: Should the downloaded file be moved to a more “permanent” location on the user’s computer if the user wants to keep it for any length of time?



21. Reports→Print Labels on Criteria—*changes*

[Entered selection criteria then clicked Submit Query button.]

[Text below was copied from above screen. Suggested changes and spelling corrections are highlighted.]

Print Labels **(CLOSE)**

Please note that printing labels is best done when using the Chrome web browser. Other browsers may be used but careful testing must be done BEFORE trying to print on label stock. Make sure that browser margin settings are correctly set in any case.

This facility allows the creation of a page formatted as printing labels based on the criteria selected. All labels will be sorted by zip code in ascending sequence.

Before printing labels, use Chrome's print function (File -> Print -> More Settings) to define the custom margin settings to top margin to 0.6 inch and all other print margins to 0 (zero).

Suggestion: try printing a single test page on plain paper first. Hold it up to the light behind a sheet of labels to make sure

the printed labels line up with the **labels** on the page.

Select one or more of the following criteria:

- 0-Contacts, or
- 1-Members, or
- 2-Volunteers, or
- 3-Donors

AND

- Exclude those with email addresses

- Funding Date Range is from: and/or before:

- Total Funding Range is greater than or equal to: and/or less than or equal to:

Number of labels to skip on 1st page (max. 29):

Submit Query

[These are the labels to be printed.]

Rows extracted: 74 No mail/no addr: 0/0 Excl Email: 66 Labels printed: 8 CLOSE CONTINUE	Brandi Bergreen 738 Grand Ave. #9 San Luis Obispo, CA 93401	James W. Duncan 1269 B 5th St. Los Osos, CA 93402
Celia Zaentz 633 Ramona Ave. #103 Los Osos, CA 93402-2173	Julie & David Hammack 187 Bakersfield Ave. Cayucos, CA 93430	Margaret Korisheli 468 Piney Way Morro Bay, CA 93442-2652
Linda & Darrell Pester 3520 Creston Rd. Paso Robles, CA 93446	Monica Cantu & Carie Sin 5250 Deer Creek Way Paso Robles, CA 93446-9206	Lynn Hixson 2975 Templeton Rd. Templeton, CA 93465

22. Reports→Membership Drill Down Report—*changes*

[Selected an entry in drop-down list.]

Member Summary Drilldown [CLOSE](#)

This report provides the ability to list the various membership status available. A summary of all members in that status will be listed when selected. Then you may select one of those from the dropdown menu to inspect the detail members associated with it.

Select a Membership Status [Contact\(0\)](#) [Member\(1\)](#) [Volunteer\(2\)](#) [Donor\(3\)](#)

[Text below was copied from above screen. Suggested changes and spelling corrections are **highlighted**.]

Member Summary Drilldown [\(CLOSE\)](#)

This report provides the ability to list the various membership status **available**. A summary of all members in that status will be listed when selected. Then you may select one of those from the dropdown menu to inspect the detail members associated with it.

[In the pages below, used **START OVER** to return to Member Summary Drilldown page above.]

[When in a **Category**, e.g., **Contact(0)**, its summary page was displayed first and then its drop-down list was used to select a sub-category.]

[At any time the **(CLOSE)** button can be clicked to close the Member Summary browser tab.]

/Contact(0) reports.]

Listing for Category: Contact(0) [CLOSE](#)

START OVER
View members records for: ▾

MC Type	Mbr.Count
NONE: 1	
0-Proposed	1201
0-Rescuer	6
Type Count: 3	Total Mbrs: 1208

Listing for Category: Contact(0) [CLOSE](#)

START OVER
View members records for: ▾

0-Proposed	0-Rescuer
1201	6
Type Count: 3	Total Mbrs: 1208

Listing for Category: Contact(0) [CLOSE](#)

START OVER
View members records for: ▾
Listing member records for 0-Proposed (Choose Again)

MCID	MemStatus	Member Name
ABB22	0	Beverly Abbey
ABS42	0	Laurie Abshire
ACO12	0	Roberto Acosta & Natalia Diaz-Acosta
ADA63	0	Donna Adamson
AGU11	0	Troy Agueros

Listing for Category: Contact(0) [CLOSE](#)

START OVER
View members records for: ▾
Listing member records for 0-Rescuer (Choose Again)

MCID	MemStatus	Member Name
CLE40	0	Bob Cleghorn
MCD13	0	Barbara McDonald
RAO12	0	Shante Rao
RUS32	0	Dina Rush
VAL17	0	Michael Valenzuela
YAZ29	0	Donya Yazdi
Count:		6

/Member(1) reports.]

Listing for Category: Member(1) [CLOSE](#)

START OVER
View members records for: ▾

MC Type	Mbr.Count
1-IndivOrFamily	552
1-Lifetime	3
1-Sr-Student	147
1-Subscriber	70
Type Count: 4	Total Mbrs: 772

Listing for Category: Member(1) [CLOSE](#)

START OVER
View members records for: ▾

1-IndivOrFamily	1-Lifetime	1-Sr-Student	1-Subscriber
552	3	147	70
Type Count: 4 Total Mbrs: 772			

Listing for Category: Member(1) [CLOSE](#)

START OVER
View members records for: ▾
Listing member records for 1-IndivOrFamily (Choose Again)

MCID	MemStatus	Member Name
AAR94	1	Nancy J. Aaron
ABB16	1	Michele Abba
ABB17	1	Louise Abbott
ADA10	1	John W. & Sally Adam
ADA24	4	Dionne W. Adams & Paul Madison

Listing for Category: Member(1) [CLOSE](#)

START OVER
View members records for: ▾
Listing member records for 1-Lifetime (Choose Again)

MCID	MemStatus	Member Name
DUG33	1	Barbie and Dan Dugan
HOR14	1	Elizabeth & Mark Hornickel
KEE11	1	Ms. Christy Keeling
Count:		3

Listing for Category: Member(1) [CLOSE](#)

START OVER
View members records for: ▾
Listing member records for 1-Sr-Student (Choose Again)

MCID	MemStatus	Member Name
ABR89	1	Kimberly Abraham
AEB15	1	Tea & Nico Aeblscher
ALL35	1	Brenda Allmann
AMB52	1	Howard & Sandra Amborn
AND24	1	Thomas Anderson

Listing for Category: Member(1) [CLOSE](#)

START OVER
View members records for: ▾
Listing member records for 1-Subscriber (Choose Again)

MCID	MemStatus	Member Name
ALE20	1	Luke Alexander
AND53A	1	Adele Anderson
BAC69	1	Melanie & John Bachman
BEC17	1	Shelly & Mike Becker
REP73	1	Brandi Pearson

[Volunteer(2) reports.]

Listing for Category: Volunteer(2) [CLOSE](#)

[START OVER](#)

View members records for: ▾

MC Type	Mbr.Count
2-VolLifeTime	3
2-VolSubscr	25
2-Volunteer	212

Type Count: 3 Total Mbrs: 240

Listing for Category: Volunteer(2) [CLOSE](#)

[START OVER](#)

View members records for: ▾

- [View members records for:](#)
- [2-VolLifeTime](#)
- [2-VolSubscr](#)
- [2-Volunteer](#)

2-VolSubscr	25
2-Volunteer	212

Type Count: 3 Total Mbrs: 240

Listing for Category: Volunteer(2) [CLOSE](#)

[START OVER](#)

View members records for: ▾

Listing member records for 2-VolLifeTime ([Choose Again](#))

MCID	MemStatus	Member Name
MUE17	2	Andrea & Stanley Muenter
NIC76	2	Dani & Bill Nicholson
RIG12	2	Shannon Riggs & Brian McKinney

Count: 3

Listing for Category: Volunteer(2) [CLOSE](#)

[START OVER](#)

View members records for: ▾

Listing member records for 2-VolSubscr ([Choose Again](#))

MCID	MemStatus	Member Name
BAK56	2	Ms. Marcelle Bakula
BEL60	2	Ms. Susan Belany
BOO11	2	Beatriz Boothe
CAI58	2	Kathy Cain

AUE78 2 Valley & Lake Owners

Listing for Category: Volunteer(2) [CLOSE](#)

[START OVER](#)

View members records for: ▾

Listing member records for 2-Volunteer ([Choose Again](#))

MCID	MemStatus	Member Name
AAS47	2	Joanne L. Aasen
ADA70	2	Lucinda Adamson
AHE22	2	Alan & Kathleen Aherne
AIE30	2	Erin and Brady Aiello

ALB26 2 Eva Albrecht

[Donor(3) reports.]

Listing for Category: Donor(3) [CLOSE](#)

[START OVER](#)

View members records for: ▾

MC Type	Mbr.Count
3-Affiliate	1
3-Agency	4
3-Business	15
3-Company	2
3-Donor	335
3-Event	47
3-Org	18
3-Rescuer	18
3-Vet	19

Type Count: 9 Total Mbrs: 459

Listing for Category: Donor(3) [CLOSE](#)

[START OVER](#)

View members records for: ▾

- [View members records for:](#)
- [3-Affiliate](#)
- [3-Agency](#)
- [3-Business](#)
- [3-Company](#)
- [3-Donor](#)
- [3-Event](#)
- [3-Org](#)
- [3-Rescuer](#)
- [3-Vet](#)

3-Donor	335
3-Event	47
3-Org	18

Listing for Category: Donor(3) [CLOSE](#)

[START OVER](#)

View members records for: ▾

Listing member records for 3-Affiliate ([Choose Again](#))

MCID	MemStatus	Member Name
UNI10A	3	University of CA, Davis

Count: 1

End of member list

[START OVER](#)

Listing for Category: Donor(3) [CLOSE](#)

[START OVER](#)

View members records for: ▾

Listing member records for 3-Agency ([Choose Again](#))

MCID	MemStatus	Member Name
CIT00	3	City of SLO
COU00	3	County of SLO
FES11	3	M. B. Winter Bird Festival
MOR20	3	Morro Bay State Park

Count: 4

Listing for Category: Donor(3)		
START OVER		CLOSE
View members records for: ▾		
Listing member records for 3-Business (Choose Again)		
MCID	MemStatus	Member Name
AIS64	3	AIS Construction Co.
BEV68	3	Pacific Beverage
ELD11	3	Elderhostel, Inc.
GRO20	3	OSHA Compliance Group
GYM21	3	Central Coast Gymnastics
HOM72	3	Home Arts

Listing for Category: Donor(3)		
START OVER		CLOSE
View members records for: ▾		
Listing member records for 3-Company (Choose Again)		
MCID	MemStatus	Member Name
NAI85	3	NIAC
PRO27	3	Promega Biosciences
Count: 2		
End of member list		
START OVER		

Listing for Category: Donor(3)		
START OVER		CLOSE
View members records for: ▾		
Listing member records for 3-Donor (Choose Again)		
MCID	MemStatus	Member Name
ABB44	3	Sherry & Casey Abbott
ABE11	3	Linda & William Abernathy
ADO25	3	Adobe
AIS17	3	Mary E Alsenberg
AKE73	3	Keri Akers
ALL63	3	Michelle & Scott Allison

Listing for Category: Donor(3)		
START OVER		CLOSE
View members records for: ▾		
Listing member records for 3-Event (Choose Again)		
MCID	MemStatus	Member Name
ADA43	3	Rebecca Adams
AIK61	3	Susan Aiken
ARD91	3	Amelia Arden
BER41	3	Corinne Berenson
BEZ10	3	Heldi & David Bezale
BRA14	3	Sandra Brazil

Listing for Category: Donor(3)		
START OVER		CLOSE
View members records for: ▾		
Listing member records for 3-Org (Choose Again)		
MCID	MemStatus	Member Name
ARR16	3	Arroyo Grande Lions Club
AUT87	3	Central Coast Autism Spectrum Ctr.
BEL27A	3	Bella Vista
CAM76	3	Cambria Chamber of Commerce
CCC48	3	Cambria Community Council
DAN67	3	Dana Adobe

Listing for Category: Donor(3)		
START OVER		CLOSE
View members records for: ▾		
Listing member records for 3-Rescuer (Choose Again)		
MCID	MemStatus	Member Name
BRO49	3	Rich Brown
CHI40	3	Susie Chiappari
COO72	3	Daniel Coomey
FER15	3	Casey Fera
GAN40	3	Evelyn Gandara
GID38	3	Suzanna Giddens

Listing for Category: Donor(3)		
START OVER		CLOSE
View members records for: ▾		
Listing member records for 3-Vet (Choose Again)		
MCID	MemStatus	Member Name
ANI16	3	Dr. Richard Tao
ARR12	3	Arroyo Grande Vet Clinic
BEL82	3	Dr. Bell
CAM25	3	Cambria Animal Medical Clinic
CHE100	3	Dr. Cherbinsky
CHO20	3	Dr. Choy

23. Reports→New Supporters by Date Range—*changes*

[Left default Start Date and End Date then clicked Submit button.]

New Supporters Report		
Start Date: 2015-01-01	End Date: 2015-06-30	<input type="button" value="Submit"/>
This report is a listing of new contacts, members, volunteers or donors that have joined within the following specific date range (default is THIS year to date).		
Listed supporters are selected by comparing the 'Date Joined' of each supporter record to the specified date range. If the 'Date Joined' is within the specified date range, it is included in this listing. Funding records for each selected member are included in the totals if they are also within the specified date range and are marked as 'Dues' or a 'Donation'.		
The 'Date Joined' of the supporter record is set on introduction of the supporter into the database. It can not be changed once established.		

[Text below was copied from above screen. Suggested changes and spelling corrections are highlighted.]

New Supporters Report (CLOSE)

Start Date: End Date: **Submit**

This report is a listing of new contacts, members, volunteers or donors that have **joined** within the following specific date range (default is THIS year to date).

Listed supporters are selected by comparing the 'Date Joined' of each supporter record to the specified date range. If the 'Date Joined' is within the specified date range, it is included in this listing. Funding records for each selected member are included in the totals if they are also within the specified date range and are marked as 'Dues' or a 'Donation'.

The 'Date Joined' of the supporter record is set on introduction of the supporter into the database. It **cannot** be changed once established.

[Clicked the (CLOSE) button.]

New Supporters Report (CLOSE)															
Start Date 2015-01-01		End Date 2015-06-30		Submit											
New supporters in date range: 245 with total dues paid of \$8,481 and total donations paid of \$1,780															
DOWNLOAD CSV FILE															
MCID	MemStatus	MC Type	DateJoined	TotDues	TotDon	LabelLine1	Email Address	Phone	Notes						
ADA70	2-Volunteer		2015-01-03	(1)\$0	0	Lucinda Adamson	la@birdlynx.net	707-407-9029							
AKE73	3-Donor		2015-03-23	0	(1)\$20	Ken Akers			in Memory of Terri						
AND26	3-Donor		2015-05-04	0	(1)\$10	Margo Anderson	manderson4@sbcglobal.net	805-704-8581							
AND45	1-1St-Student		2015-06-14	(1)\$30	0	Helen and Mark Anderson	manderson93401@charter.net	805-439-0500	An Resc.						
AUT54	1-IndivFamily		2015-04-29	(1)\$100	0	Stephen Autry	steveauty@autycellars.com	805-540-8069							
BAI50	0-Proposed		2015-01-27	(1)\$25	0	Jane Bailey	sjepaine1@gmail.com	206-295-2944							
BAK20	1-IndivFamily		2015-03-08	(1)\$50	0	Kathy Baker	kbaker3209@gmail.com	805-225-1711							

24. Reports→Membership Exception Report—*changes*

[Clicked the CONTINUE button.]

MbrDB Exception Report **(CLOSE)**

Explanation of report

The classifications of the records for Mbrdb is:

1. Members - records with a member status of '1-Member' with at least 1 payment record marked as 'Dues' paid within the expiration period.
 2. Volunteers - a member (see above) that is donating time as well as being a dues paying member.
 3. Donors - non-members that provide funding support. Usually entities that are not a person like a company, estate, trust, business, affiliated organization, etc. Usually this entity will be registered with a contact person acting as a representative or internal contact for the entity.
 4. Contacts - None of the above. This represents the 'pool' of candidates for recruitment of both financial and volunteer time support.

It should be the goal is to classify all those who provide financial support and/or volunteer time into as a member, volunteer or donor. Those that do not qualify should be re-classified as a '0-Contact'.
 The expiration date used is 11 months from the current month and is listed with each report section.

Report Sections

6-Contact That Paid Dues or Made A Donation - lists all records classified as Member Status of 0 (Contacts) that have current funding records paid within the expiration period.

1-Members or 2-Volunteers With NO Dues Payment Record - list of all records classified as 1-Member or 2-Volunteer with NO funding records paid within the expiration period.

3-Donors with NO Donations - list of all records classified as 3-Donor with NO donation or dues funding records paid within the expiration period.

Invalid Mail or Email Flag Settings - list of those records that have inconsistent flag settings on the Mail and/or Email flags indicating that they want mail and/or email but there is no information provided to do so.

Supporter records with NO funding records - list of supporters that have no associated funding records. These should be examined to determine if they should be made inactive.

CONTINUE

[Text below was copied from above screen. Suggested changes and spelling corrections are highlighted.]

MbrDB Exception Report **(CLOSE)**

Explanation of report

The classifications of the records for MbrDB are:

1. Members - records with a member status of '1-Member' with at least 1 payment record marked as 'Dues' paid within the expiration period.
2. Volunteers - a member (see above) that is donating time as well as being a dues paying member.
3. Donors - non-members that provide funding support. Usually entities that are not a person like a company, estate, trust, business, affiliated organization, etc. Usually this entity will be registered with a contact person acting as a representative or internal contact for the entity.
4. Contacts - None of the above. This represents the 'pool' of candidates for recruitment of both financial and volunteer time support.

[Suggested rewrite of above, listed in the same order as the report sections.]

The classifications of the records in the MbrDB are:

1. **0-Contact** – supporters that are candidates for both financial and volunteer-time support.
2. **1-Member** – dues paying supporters with at least 1 payment record marked as 'Dues' that has a payment date within the expiration period
3. **2-Vol** – dues paying supporters with at least 1 payment record marked as 'Dues' that has a payment date within the expiration period and has volunteer hours recorded
4. **3-Donor** – supporters that provide funding support. Donors can be a person, company, estate, trust, business, or affiliated organization. If not a person, this supporter record may have a person that acts as a representative or internal contact for the entity.

It should be the goal is to classify all those who provide financial support and/or volunteer time **into** as a member, volunteer or donor. Those that do not qualify should be re-classified as a '0-Contact'.

The expiration date used is 11 months from the current month and is listed with each report section.

Report Sections

1. **0-Contacts That Paid Dues or Made A Donation:**
List of all records classified as Member Status of 0 (Contacts) that have current funding records paid within the expiration period.
2. **1-Members or 2-Volunteers With NO Dues Payments Recorded:**
List of all records classified as Member Status of 1 (Member) or 2 (Volunteer) with NO funding records paid within the expiration period.
3. **3-Donors with NO Donations:**
List of all records classified as Member Status of 3 (Donor) with NO donation or dues funding records paid within the expiration period.
4. **Invalid Mail OK? or Email OK? Flag Settings:**
List of all records that have a ~~inconsistent flag settings on the~~ Mail OK? or Email OK? flag set to "Yes" indicating that they want mail and/or email but there is no information provided to do so.
5. **Supporter records with NO funding records:**
List of supporters that have no associated funding records. These should be examined to determine if they should be made inactive.

CONTINUE

[Report is opened in a new browser tab and report sections are displayed in the order shown above.]

[After perusing the sections I clicked the (CLOSE) button at the top of the page.]

[Section 1: 0-Contacts That Paid Dues or Made A Donation]

MbrDB Exception Report (CLOSE)						
0-Contact That Paid Dues or Made A Donation						
There were 13 records classified as '0-Contacts' that made a payment marked as either 'Dues' or as a 'Donation' of some kind. Those listed were paid within the expiration period. These member records MAY qualify as members, volunteers or donors.						
Those in this list should probably be re-classified as members or donors.						
The expiration date used is 2014-07-01						
MCID	MCType	Name	Last Dues Date	Last Dues Amt	Last Don. Date	Last Don. Amt
BER67	0-Proposed	Chris Berdell		2015-04-07	20.00	
CLE40	0-Rescuer	Bob Cleghorn		2015-05-15	5.00	
CLE78	0-Proposed	Thomas Clegg	2011-12-19	30.00	2015-03-24	70.00
DAV53	0-Proposed	Helen K. Davie	2015-05-15	40.00	2015-05-15	303.90
HAT15	0-Proposed	Cynthia Hathaway	2013-09-23	25.00	2015-03-08	
IRV14		Carla Irvine		2015-02-09	20.00	
MAC80A	0-Proposed	Mackey & Mackey		2015-02-26	100.00	
MCD13	0-Rescuer	Barbara McDonald		2015-04-01	20.00	

[Section 2: 1-Members or 2-Volunteers With NO Dues Payments Recorded]

---- END OF LIST ----

1-Members or 2-Volunteers With NO Dues Payments Recorded

There were 16 records classified as '1-Member' or '2-Volunteer'; without ANY funding records marked as 'Dues' associated with them. These member records should be reviewed and reclassified if warranted.

If the record is to be retained as a member or volunteer, a \$0 dues payment could be entered to remove the record from this list and allow review of this status in 11 months.

The expiration date used is 2014-07-01

MCID	Name	MCTYPE	Last Dues Date	Last Dues Amount
ALV41	Frank Alvarado	2-Volunteer		
BOR28	Steve Borges	2-Volunteer		
ELI16	Alexandra Elias	2-Volunteer		0.00
GON93	Tracie Gonzales	2-Volunteer		
GRA55	Jacqueline Graham	1-Sr-Student		
HAA53	Bob Haas	1-Sr-Student		
HAN85	Kaitlyn Hanley	2-Volunteer		0.00
HAX21	Larry Hazen	1-IndivorFamily		
KOW24	Jacqueline Kowalski	2-Volunteer		
NAB22	Sue Nabhan	1-IndivorFamily		

[Section 3: 3-Donors with NO Donations]

[Section 4: Invalid Mail OK? or Email OK? Flag Settings]

[Section 5: Supporter records with NO associated funding records]

---- END OF LIST ----

3-Donors with NO Donations

There were 1 records classified as '3-Donor' that have NO non-Dues payment logged within the expiration period. These member records should be reviewed and reclassified if warranted.

The expiration date used is 2014-07-01

MCID	Name	MCTYPE	Last Don. Date	Last Don. Amount
ZEI69	Natalie Zeltz	3-Donor	2015-06-21	40.00

---- END OF LIST ----

Invalid Mail or Email Flag Settings

---- END OF LIST ----

List of supporters with NO associated funding records

There are 89 active supporters that have NO funding records associated with them. All these records should be reviewed and probably set inactive.

MCID	FName	LName	MCTYPE	MemDate	Inactive
ALD77	Gwinn	Alderson	0-Proposed	2013-08-25	FALSE
ALE47	Joseph & Lisa	D'Alessio	0-Proposed	2014-03-06	FALSE
ALV41	Frank	Alvarado	2-Volunteer	2014-12-29	FALSE
ARR12	Arroyo Grande Vet		3-Vet	2007-03-01	FALSE

25. Reports→Subscribing Members Report—*changes*

[Clicked the **CONTINUE** button.]

Subscribing Members Report (CLOSE)

This report provides a reconciliation point for members that have been identified as 'subscribing' members where a subscribing member is defined as having a Member Status of '1-Member' with a Member Type of '1-Subscriber' or a Member Status of '2-Volunteer' with a Member Type of '2-VolSubscriber'.

This report has 5 potential sections:

1. Listing of all subscription members whose last DUES payments was marked as a 'non-subscriber' payment but their membership status and type indicate them as a 'subscriber'. These MCID's should be examined and either the payment changed to a 'subscriber' payment OR the member's record be updated to make them a 'subscriber' member.
2. Listing of all regular members whose last DUES payments was marked as a 'subscription' payment but their membership status and type do NOT indicate them as a 'subscriber' member. These MCID's should be examined and either the payment changed to a 'regular' purpose OR the member's record be updated to make them a 'subscriber' member or volunteer.
3. Listing of all 'subscribing' members that do not have a 'subscription' DUES payment within the last 120 days. These MCID's may need to be reclassified marking them 'non-subscribers' or the DUES payment deleted and re-entered as a subscription payment.
4. Listing of regular members with current payments made within the last 120 days with a payment that would appear to be incorrectly categorized. This payment(s) may need to be reclassified by deleting the DUES payment and re-entering it as a subscription payment.
5. Listing of all MCID's that are registered as 'subscribing' members that have a DUES payment designated as a 'subscriber' payment within the last 120 days.

NOTE: the first three sections will not appear unless there is a qualifying MCID to be listed.

CONTINUE

[Text below was copied from above screen. Suggested changes and spelling corrections are highlighted.]

Subscribing Members Report (CLOSE)

This report provides a reconciliation point for **supporters who are subscribers**.

Supporter who are subscribers have

- a Mbr Status of '1-Member' and a Mbr Type of '1-Subscriber'
OR
- a Mbr Status of '2-Volunteer' and a Mbr Type of '2-VolSubscriber'.

All other supporters are 'non-subscribers'.

This report has 5 potential sections:

1. Subscribing Members with Last Payment entered as a 'non-subscription' payment of Dues:

Listing of all subscribers whose last DUES payment was marked as a 'non-subscription' payment but their member status and type indicate they are a subscriber. These MCIDs should be examined and either the payment changed to a 'subscription' payment OR the member's record be updated to make them a 'regular' member or volunteer (non-subscriber).

2. Non-Subscribing Members with Last Payment entered as a 'subscription' payment:

Listing of all non-subscribers whose last DUES payment was marked as a 'subscription' payment but their membership status and type do NOT indicate them as a subscriber. These MCIDs should be examined and either the payment changed to a 'regular' purpose payment OR the member's record be updated to make them a 'subscribing' member or volunteer.

3. Delinquent Subscribing Members:

Listing of all subscribers that have not made a 'subscription' DUES payment within the last 120 days. These MCIDs may need to be reclassified by making them 'non-subscribers' or the DUES payment deleted and re-entered as a 'subscription' payment.

4. Subscribing Members with Unclassified Payment:

Listing of all subscribers with current payments made within the last 120 days and with a payment that would appear to be incorrectly categorized. This payment(s) may need to be reclassified by deleting the DUES payment and re-entering it as a 'subscription' payment.

5. Current Subscribing Members:

Listing of all MCIDs that are registered as subscribers with a DUES payment designated as a 'subscription' payment within the last 120 days. No action is required.

NOTE: the first three sections will not appear unless there is a qualifying MCID to be listed.

CONTINUE

Subscribing Members Report (CLOSE)					
1. Subscribing Members with Last Payment marked as Dues is a 'non-subscription' Payment					
Subscription members having their last Dues payment marked as a 'non subscription' payment. Their status should be reviewed and either the payment's Program or the member's status changed appropriately.					
MCID Program LastPay Name MemType Notes					
RA49 Dues-AnnualMbr 2015-06-17 Kristina Raine 1-Subscriber					
HL14 Dues-AnnualMbr 2015-02-03 Anylane Hill 1-Subscriber 2013: \$100 dues/donations (\$25 to FOV) 2014: \$100 dues as of 8/7/14					
---- END OF LIST ----					
2. Non-Subscribing Members with Last Payment marked as Dues is a 'subscription' Payment					
Members having their last Dues payment marked as a 'subscription' payment but are not noted as a subscribing member or subscribing volunteer.					
MCID Program LastPay Name MemType Notes					
DOR15 Dues-Subscr 2015-06-20 Sharlene Dorsey 2-Volunteer 1y KYWaddell 7/11 - 4/15 entitled her cc expiring. N/A to email(s)					
KL40 Dues-Subscr 2015-05-20 Liz & Dave Kizzman 2-Volunteer Dave cell: 805-704-2941 Liz cell: 805-704-2642					
LEE16 Dues-Subscr 2015-02-11 Carrie Lee 1-Indiv/Family 2/15 her cc needed new exp. date - she called to CANCEL her subscription. send renewal in 1 yr (Feb 2016)					
MAN11 Dues-Subscr 2015-06-03 Barbara Marnetar 1-Indiv/Family Note 8/10 chngd to subscr/eng. 04/11 expired/stopped; 3/13 restarted subscript, 4/15 Has to cancel subscript, now Renew 4/18 Oct 2014 - Subscription cancelled (budget tight) sent 2014 Tax Receipt - remind in oct 2015					
PEM20 Dues-Subscr 2014-09-16 Joel Pemberon 1-Indiv/Family					

[Text below was copied from above screen. Suggested changes and spelling corrections are highlighted.]

Subscribing Members Report

1. Subscribing Members with Last Payment entered as a 'non-subscription' payment of Dues

Subscription members having their last Dues payment marked as a 'non-subscription' payment. Their status should be reviewed and either the payment's Program or the member's status changed appropriately.

MCID	Program	LastPay	Name	MemType	Notes
ERL27	Dues-AnnualMbr	2015-06-19	Marion & Jerome Erling	1-Subscriber	5/10 new address - past: PO Box 3147 Pismo Beach, Ca. 93448

---- END OF LIST ----

2. Non-Subscribing Members with Last Payment entered as a 'subscription' payment

Members having their last Dues payment marked as a 'subscription' payment but are not noted as a subscribing member or subscribing volunteer.

MCID	Program	LastPay	Name	MemType	Notes
DEL11	Dues-Subscr	2015-06-24	Julie & David Delfino	1-Sr-Student	cell: 801-4944
DOR16	Dues-Subscr	2015-06-08	Sharlene Dorsey	2-Volunteer	KWaddell 7/11 - 4/15 emled her cc expiring. N/A to email(s)
QLI46	Dues-Subscr	2015-06-19	Liz & Dave Klinzman	2-Volunteer	Dave cell: 805-704-2841 Liz cell:

Overview							
VIV17	Dues-Subscr	2014-09-07	June Viviani	1-Indiv/Family	C:(805) 540-9557 9/14 stopped subscribing - RR: 9/15		
WIG45	Dues-Subscr	2015-02-10	Graig Wise & Yvonne Willis	2-Volunteer	See also wife: Yvonne Willis (WIL45); h: 227-0599 "subscriber" only for Jan & Feb. 2015 (\$30)		
---- END OF LIST ----							
3. Delinquent Subscribing Members							
Subscribing members with no subscription payment in last 120 days. (NOTE: some may also have their last payments improperly classified.)							
MCID	Program	LastPay	Name	MemType	Notes		
HIL14	Dues-Subscr	2015-02-03	Arylane Hill	1-Subscriber	\$100 dues/donations (\$25 to FOV) 2014: \$100 dues as of 8/7/14		
---- END OF LIST ----							
4. Subscribing Members with Unclassified Payment							
---- END OF LIST ----							
5. Current Subscribing Members (95)							
Subscribing members with current, up to date subscription payments. Total value of all subscriptions: \$3,232.00							
MCID	Program	LastPay	LastDues	Name	MemType	Phone	Email Address
ALE20	Dues-Subscr	2015-06-11	20.00	Luke Alexander	1-Subscriber	408-398-5182	rvluke@gmail.com
AND53A	Dues-Subscr	2015-06-17	10.00	Adele Anderson	1-Subscriber	805-541-6474	anderson538@att.net
BAC09	Dues-Subscr	2015-06-11	20.00	Melanie & John Bachman	1-Subscriber	805-772-2065	mbracewra497@charter.net
BAK56	Dues-Subscr	2015-06-20	20.00	Ms. Marcelle Bakula	2-Vol/Subscriber	805-927-1017	marcelle@digitaljputy.com
BEC17	Dues-Subscr	2015-05-31	20.00	Shelly & Mike Becker	1-Subscriber	805-927-2659	shely.cambria@yahoo.com
BEL80	Dues-Subscr	2015-06-05	33.00	Ms. Susan Belany	2-Vol/Subscriber	805-927-1855	suska@charne.net
BER73	Dues-Subscr	2015-06-06	15.00	Brandi Bergreen	1-Subscriber	909-921-9242	bbergreen@yahoo.com

[Text below was copied from above screen. Suggested changes and spelling corrections are highlighted.]

3. Delinquent Subscribing Members

Subscribing members with no subscription payment in last 120 days.
(NOTE: some may also have their last payments improperly classified.)

MCID	Program	LastPay	Name	MemType	Notes
HIL14	Dues-Subscr	2015-02-03	Arylane Hill	1-Subscriber	2013: \$100 dues/donations (\$25 to FOV) 2014: \$100 dues as of 8/7/14

----- END OF LIST -----

4. Subscribing Members with Unclassified Payment

----- END OF LIST -----

5. Current Subscribing Members (94)

Subscribing members with current, up to date subscription payments.
Total value of all subscriptions: \$3,232.00

MCID	Program	LastPay	LastDues	Name	MemType	Phone	Email Address
ALE20	Dues-Subscr	2015-06-11	20.00	Luke Alexander	1-Subscriber	408-398-5182	rvluke@gmail.com
AND53A	Dues-Subscr	2015-06-17	10.00	Adele Anderson	1-Subscriber	805-541-6474	anderson538@att.net

26. Reports→Correspondence Drill Down—

[Changed dates as desired and then clicked the **SUBMIT** button.]

Correspondence Summary Drilldown	CLOSE
2015-06-01	2015-06-20
This report provides the ability to list and detail the various correspondence categories that are currently in the correspondence log of the database. The categories are configured in by the administrator as correspondence categories. Each category should specify a type of correspondence used to communicate with the member. Some category values are historical and have been retained from prior systems and may be seen depending on the date range defined.	
First, choose one of the categories to examine. A list of all detail records in that category will be listed for the date range specified.	

Correspondence Summary Drilldown

(CLOSE)

2015-07-	2015-07-
----------	----------

This report provides the ability to list and detail the various correspondence categories that are currently in the correspondence log of the database. The categories are configured in by the administrator as **correspondence** categories. Each category should specify a type of **correspondence** used to communicate with the member. Some category values are historical and have been retained from prior systems and may be seen depending on the date range defined.

First, choose one of the categories to examine. A list of all detail records in that category will be listed for the date range specified.

[List shown below will vary depending upon the MbrDB's current Correspondence categories.]

*[Clicked the **New Rec** link.]*

Correspondence Summary Drilldown **CLOSE**

2015-07-01 2015-07-27 **Submit**

Categories in Range (Total sent 242):

- "NewRec" (1)
- DonationTY (28)
- EmailMsg (1)
- EmailReminder (19)
- MailReminder (13)
- MbrInactive (14)
- NewMemberTY (18)
- Newsletter (1)
- Other (1)
- RenewalPaid (127)
- RenewalReminder (1)
- RenewalTY (18)

[Clicked the DonationTY link.]

Correspondence Summary Drilldown **CLOSE**

2015-07-01 2015-07-27 **Submit**

Categories in Range (Total sent 242):

- "NewRec" (1)
- DonationTY (28)
- EmailMsg (1)
- EmailReminder (19)
- MailReminder (13)
- MbrInactive (14)
- NewMemberTY (18)
- Newsletter (1)
- Other (1)
- RenewalPaid (127)
- RenewalReminder (1)
- RenewalTY (18)

Correspondence Category ***NewRec*** (1)

MCID	DateSent	Name	Notes
ROS22	2015-07-26	Rachel Rosenthal	
----- END OF LIST -----			

[Clicked the EmailMsg link.]

Correspondence Summary Drilldown **CLOSE**

2015-07-01 2015-07-27 **Submit**

Categories in Range (Total sent 242):

- "NewRec" (1)
- DonationTY (28)
- EmailMsg (1)
- EmailReminder (19)
- MailReminder (13)
- MbrInactive (14)
- NewMemberTY (18)
- Newsletter (1)
- Other (1)
- RenewalPaid (127)
- RenewalReminder (1)
- RenewalTY (18)

Correspondence Category 'DonationTY' (28)

MCID	DateSent	Name	Notes
BAK47	2015-07-12	Sue Baker	
BAY16	2015-07-26	Linda Lue Harness	

[Clicked the EmailReminder link.]

Correspondence Summary Drilldown [CLOSE](#)

2015-07-01 2015-07-27 [Submit](#)

Categories in Range (Total sent 242):

- **NewRec** (1)
- DonationTY (28)
- EmailMsg (1)
- EmailReminder (19)
- MailReminder (13)
- MbrInactive (14)
- NewMemberTY (18)
- Newsletter (1)
- Other (1)
- RenewalPaid (127)
- RenewalReminder (1)
- RenewalTY (18)

Correspondence Category 'EmailMsg' (1)

MCID	DateSent	Name	Notes
WEG23	2015-07-21	Ronna Wegner	Subject: Ronna, sorry you had trouble sending email

----- END OF LIST -----

[Clicked the MailReminder link.]

Correspondence Summary Drilldown [CLOSE](#)

2015-07-01 2015-07-27 [Submit](#)

Categories in Range (Total sent 242):

- **NewRec** (1)
- DonationTY (28)
- EmailMsg (1)
- EmailReminder (19)
- MailReminder (13)
- MbrInactive (14)
- NewMemberTY (18)
- Newsletter (1)
- Other (1)
- RenewalPaid (127)
- RenewalReminder (1)
- RenewalTY (18)

Correspondence Category 'EmailReminder' (19)

MCID	DateSent	Name	Notes
ALE92	2015-07-12	Kathy Alexander	Email Reminder Subject: Renewal Reminder for Pacific Wildlife Care – First notification
BAK52	2015-07-12	Alex Bakula-Davis	Email Reminder Subject: Renewal Reminder for Pacific Wildlife Care – First notification
DUN89	2015-07-12	Keith Dunham	Email Reminder Subject: Renewal Reminder for Pacific Wildlife Care – First notification

[Clicked the MbrInactive link.]

Correspondence Summary Drilldown [CLOSE](#)

2015-07-01 2015-07-27 [Submit](#)

Categories in Range (Total sent 242):

- **NewRec** (1)
- DonationTY (28)
- EmailMsg (1)
- EmailReminder (19)
- MailReminder (13)
- MbrInactive (14)
- NewMemberTY (18)
- Newsletter (1)
- Other (1)
- RenewalPaid (127)
- RenewalReminder (1)
- RenewalTY (18)

Correspondence Category 'MailReminder' (32)

MCID	DateSent	Name	Notes
ALE92	2015-07-12	Kathy Alexander	Email Reminder Subject: Renewal Reminder for Pacific Wildlife Care – First notification
ALL35	2015-07-12	Brenda Allmann	Mail reminder sent by reminder system
AND14B	2015-07-12	Allene Anderson	Mail reminder sent by reminder system
RAK52	2015-07-12	Alex Bakula-Davis	Email Reminder Subject: Renewal Reminder for Pacific Wildlife Care – First notification

[Clicked the NewMemberTY link.]

Correspondence Summary Drilldown [CLOSE](#)

2015-07-01 2015-07-27 [Submit](#)

Categories in Range (Total sent 242):

- **NewRec** (1)
- DonationTY (28)
- EmailMsg (1)
- EmailReminder (19)
- MailReminder (13)
- MbrInactive (14)
- NewMemberTY (18)
- Newsletter (1)
- Other (1)
- RenewalPaid (127)
- RenewalReminder (1)
- RenewalTY (18)

Correspondence Category 'MbrInactive' (14)

MCID	DateSent	Name	Notes
ABR89	2015-07-19	Kimberly Abraham	Member set inactive by reminder system
AIA13	2015-07-19	Mark Alassa	Member set inactive by reminder system
ATN10	2015-07-19	Jack & Jeri Atnip	Member set inactive by reminder system
BAC25	2015-07-19	Maricela Bachelor	Member set inactive by reminder system
ROC18	2015-07-10	Samantha Rock	Member set inactive by reminder system

[Clicked the Newsletter link.]

Correspondence Summary Drilldown [CLOSE](#)

2015-07-01 2015-07-27 [Submit](#)

Categories in Range (Total sent 242):

- **NewRec** (1)
- DonationTY (28)
- EmailMsg (1)
- EmailReminder (19)
- MailReminder (13)
- MbrInactive (14)
- NewMemberTY (18)
- Newsletter (1)
- Other (1)
- RenewalPaid (127)
- RenewalReminder (1)
- RenewalTY (18)

Correspondence Category 'NewMemberTY' (18)

MCID	DateSent	Name	Notes
CON19	2015-07-05	Dona Connell	
CON95	2015-07-18	Daniel Connell	
CRA11	2015-07-12	Amber Craigie	
HAN15	2015-07-12	InAnn Hansen	

www.pacificwildlifecare.org/mbrdb/rptcorrdrilldown...eport&sd=2015-07-01&ed=2015-07-27&cname>NewMemberTY

[Clicked the Other link.]

Correspondence Summary Drilldown [CLOSE](#)

2015-07-01 2015-07-27 [Submit](#)

Categories in Range (Total sent 242):

- **NewRec** (1)
- DonationTY (28)
- EmailMsg (1)
- EmailReminder (19)
- MailReminder (13)
- MbrInactive (14)
- NewMemberTY (18)
- Newsletter (1)
- Other (1)
- RenewalPaid (127)
- RenewalReminder (1)
- RenewalTY (18)

Correspondence Category 'Newsletter' (1)

MCID	DateSent	Name	Notes
WIS45	2015-07-12	Craig Wise & Yvonne Willis	sent emails re: subscription "failed" April & May. - Canceled it.

----- END OF LIST -----

[Clicked the RenewalPaid link.]

Correspondence Summary Drilldown [CLOSE](#)

2015-07-01 2015-07-27 [Submit](#)

Categories in Range (Total sent 242):

- **NewRec** (1)
- DonationTY (28)
- EmailMsg (1)
- EmailReminder (19)
- MailReminder (13)
- MbrInactive (14)
- NewMemberTY (18)
- Newsletter (1)
- Other (1)
- RenewalPaid (127)
- RenewalReminder (1)
- RenewalTY (18)

Correspondence Category 'Other' (1)

MCID	DateSent	Name	Notes
DUN89	2015-07-06	Keith Dunham	emailed from MB work & called (got cut off) re: envelope asking to chg. to Visa (end 1750) for \$100. We need cvc code from back

----- END OF LIST -----

[Clicked the RenewalReminder link.]

Correspondence Summary Drilldown [CLOSE](#)

2015-07-01 2015-07-27 [Submit](#)

Categories in Range (Total sent 242):

- **NewRec** (1)
- DonationTY (28)
- EmailMsg (1)
- EmailReminder (19)
- MailReminder (13)
- MbrInactive (14)
- NewMemberTY (18)
- Newsletter (1)
- Other (1)
- RenewalPaid (127)
- RenewalReminder (1)
- RenewalTY (18)

Correspondence Category 'RenewalPaid' (127)

MCID	DateSent	Name	Notes
ALE20	2015-07-11	Luke Alexander	auto-added on payment of dues
ALV34	2015-07-15	Melinda, Ivy & Frank Alvarado	auto-added on payment of dues
AND53A	2015-07-17	Adele Anderson	auto-added on payment of dues
BAC69	2015-07-11	Melanie & John Bachman	auto-added on payment of dues

[Clicked the RenewalTY link.]

Correspondence Summary Drilldown [CLOSE](#)

2015-07-01 2015-07-27 [Submit](#)

Categories in Range (Total sent 242):

- **NewRec** (1)
- DonationTY (28)
- EmailMsg (1)
- EmailReminder (19)
- MailReminder (13)
- MbrInactive (14)
- NewMemberTY (18)
- Newsletter (1)
- Other (1)
- RenewalPaid (127)
- RenewalReminder (1)
- RenewalTY (18)

Correspondence Category 'RenewalReminder' (1)

MCID	DateSent	Name	Notes
BAK32	2015-07-19	Estella Bakula	

----- END OF LIST -----

[Clicked the CLOSE button.]

Correspondence Summary Drilldown [CLOSE](#)

2015-07-01 2015-07-27 [Submit](#)

Categories in Range (Total sent 242):

- **NewRec** (1)
- DonationTY (28)
- EmailMsg (1)
- EmailReminder (19)
- MailReminder (13)
- MbrInactive (14)
- NewMemberTY (18)
- Newsletter (1)
- Other (1)
- RenewalPaid (127)
- RenewalReminder (1)
- RenewalTY (18)

Correspondence Category 'RenewalTY' (18)

MCID	DateSent	Name	Notes
BAK32	2015-07-26	Estella Bakula	
BAP15	2015-07-12	Ms. Carol Baptiste	
BAR25	2015-07-12	Catherine Bartley	
BOL10	2015-07-26	Glenn Bolivar	

27. Reports→Transaction Log Report—

Transaction Log [CLOSE](#)

Start Date: 2015-05-01 and End Date: 2015-05-31 [Submit](#)

Funding records: 221 Total Funding: \$16,104.04

[DOWNLOAD CSV FILE](#)

CheckDate	DateEntered	ChkNor	MCID	Purpose	Program	Campaign	Amount	Notes
2015-05-31	2015-05-31		BEC17	Dues	Dues-Subscr		\$20.00	
2015-05-31	2015-05-31		MOR22A	Dues	Dues-Subscr		\$25.00	
2015-05-30	2015-05-31	ca	SPR15	Donation	Don-UresDonation		\$5.00	
2015-05-30	2015-05-31	cc-Auth	DOS13	Dues	Dues-AnnualMbr		\$50.00	
2015-05-30	2015-05-31	ca	UNL59	Donation	Don-UresDonation		\$16.34	
2015-05-30	2015-05-31	250	CAR14	Dues	Dues-AnnualMbr		\$50.00	
2015-05-29	2015-05-31	ca	CN93	Donation	Don-UresDonation		\$5.00	
2015-05-29	2015-05-31	368	BUR33	Dues	Dues-AnnualMbr		\$50.00	
2015-05-29	2015-05-30	cc-Auth	CON55	Dues	Dues-AnnualMbr		\$250.00	
2015-05-29	2015-05-29		CHA33	Dues	Dues-Subscr		\$5.00	
2015-05-28	2015-06-04	10266542	UNI10A	FrgtHome	Prog-Other		\$2470.00	Oiled bird reimbursement for March & April 2015

28. Reports→Inactive MCID Report—changes

MCID's in first line of page below should be **MCIDs**.]

MCID' in second line of page below should be **MCIDs**.]

Inactive MCID's [CLOSE](#)

List of 138 inactive MCID's eligible for deletion after Delete Date.

InAct	MCID	InactDate	DeleteDate	MemStatus	Name	Address	City	St	Zip	PrfPhone	Email
TRUE	AQR84	2014-04-12	2015-07-11	1	Little Agran & Guy Fawcett	P.O. Box 0426	Los Osos	CA	93412	805-529-2465	agranlittle@yahoo.com
TRUE	ALL19	2015-02-05	2015-05-06	1	John & Denise Allen	1945 Pippin Lane	San Luis Obispo	CA	93405	805-595-7892	
TRUE	ALP66	2015-04-12	2015-07-11	1	Ira & Marsha Albert	860 Skyline Dr.	San Luis Obispo	CA	93405		
TRUE	AND00	2015-05-24	2015-08-22	1	Shelley Anderson					805-801-5912	
TRUE	AND22	2015-04-13	2015-07-12	1	Ms. Gail Andrews	2287 Emerald Circle	Morro Bay	CA	93442-1589	805-772-1716	budabubble@hotmail.com
TRUE	AND36	2015-04-12	2015-07-11	1	Joel Anderson	P.O. Box 385	Grover Beach	CA	93483-0365	805-469-8045	
TRUE	ATT10	2015-02-05	2015-05-06	1	Wayne Atte	P.O. Box 1031	Cambria	CA	93428		
TRUE	BAJ50	2015-03-06	2015-06-04	0	Jane Bailey	1501 Curran Road #63	Morro Bay	CA	93442	206-295-2944	seajane1@gmail.com

29. Reports→Mail Log Viewer—

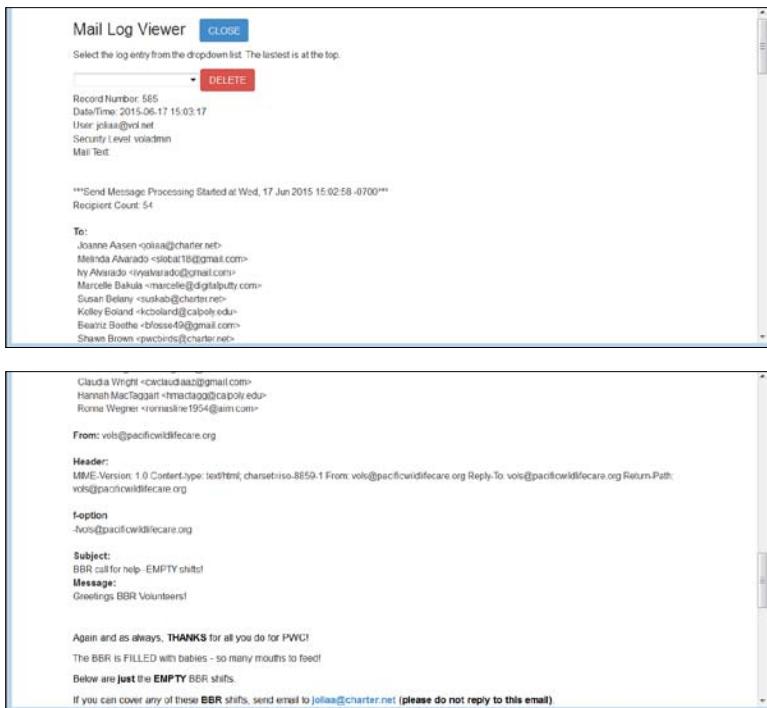
[Selected top entry from drop-down list.]



[Sample log.]

[Clicked **DELETE** button to delete the displayed list.]

[Clicked **CLOSE** button to close report page.]



30. Reports→LUBUNTY Report—*changes(?)*

[Suggest changing description to "This report lists all MCIDs that have not provided ANY financial support for the selected year, but HAVE provided financial support in the year previous to the selected year."]



Last Year BUT Not This Year(SYBUNTY) Report CLOSE																
Sponsors for 2014 w/o YD funding for 2015. Total is \$301,986. DOWNLOAD CSV FILE																
MCID	Category	Contribution	Latitude	Longitude	Street	Label Name	First	Last	Organization	Address	City	St	Zip	Phone	Email	
GODT	\$13,000	\$26,000	33.0000	-124.2000	2	Dorothy Correa & Garrett Fink	Dorothy	Correa		773 Alta Vista Way	Arroyo Grande	CA	93420	(805) 458-3886	avr4ley@gmail.com	
POTR	\$42,000	\$11,000	33.0000	-124.1320	1	Beth and Candace Forbes	Beth	Forbes		145 Twin Bridges Dr	San Luis Obispo	CA	93405	(805) 544-5889	mbforbes@msn.com	
COLD	\$26,000	\$26,000	33.0000	-124.1321	3	Jim Davis	Jim	Davis	Celadon Charitable Trust							
GLAB	\$11,331	\$3,000	33.0000	-124.1010	1	Karen & James Deke	Karen	James	Deke	SEA CHEF	6216 Nacimiento Beach	Cambria	CA	93420	(805) 567-0108	wesche@charter.net
LWBR	\$16,000	\$16,000	33.0000	-124.0820	2	Gen Levine Priv Law Corp	Gen	Levine	Gen Levine Priv Law Corp	1401 Monterey St	Alexander	CA	93423			
GDWD	\$7,500	\$600	33.0000	-124.1114	3	County of SLO			County of SLO	County of SLO	San Luis Obispo	CA	93441			
LRK3	\$5,000	\$6,000	33.0000	-124.1320	3	Michael & Priscilla Lipek	Michael	Lipek		PO Box 1887	Carmel	CA	93128-0887			
AKAC	\$6,000	\$6,000	33.0000	-124.1320	1	Larry Kahn	Larry	Kahn		PO Box 224	Carla Margarto	CA	93442	(805) 458-4000	larrykahn@yahoo@yahoo.com	
PRO18	\$5,000	\$5,000	33.0000	-124.1320	2	The Brown Family Foundation	Doug	Brown	B	1319 Wedge Pkwy	Reno	NV	895-11-8134		tgjleekj@msn.com	
ANPA	\$6,000	\$16,000	33.0000	-124.1116	1	Nancy J. Aaron	Nancy	Aaron		943 Andover Dr	Morro Bay	CA	93442	(805) 772-0082	nancyaaron@msn.net	
SLAT	\$4,000	\$4,000	33.0000	-124.1320	3	Theresa Odile Jr. & Kelline Thurmon	Theresa	Odile		154 S. Ainsley Blvd	Pismo Beach	CA	93455-1619			
GAZB	\$1,375	\$500	33.0000	-124.1231	1	Roger Evans	Roger	Evans	Cavins Park, Ltd.	311 Cavins Ave	Long Beach	CA	90803-8324	949-858-4743	reinadevans@hotmail.com	
BAZG	\$1,000	\$1,000	33.0000	-124.1200	3	Bethrice Barbour	Bethrice	Barbour		12220 Forest Hill Blvd	Wellesley	FL	33474	561-795-0081		
QAZB	\$1,000	\$100	33.0000	-124.1201	1	Rosemarie Cascio	Rosemarie	Cascio		159 Granite	Tampa	CA	93488	942-854-4741	baw442@msn.com	
WEZT	\$1,000	\$1,000	33.0000	-124.1205	1	One Love For Kids, Inc.	One Love	For Kids		200 1st Street Dr	Winnipeg	CA	93446-0870	(805) 975-0519	102@msn.com	
ASPR	\$1,000	\$1,000	33.0000	-124.1320	2	Dr. Richard Tari	Asper	Care	Asper Care Clinic	101 Cross Street	San Luis Obispo	CA	93401	(805) 545-0710		
LGZB	\$1,000	\$3,000	33.0000	-124.1201	1	Donald & Sue Ehr	Donald	Ehr		2446 Neptune Street	San Luis Obispo	CA	93402	(805) 947-0542	sukharsi@charter.net	

31. Reports→SYBUNTY Report—changes(?)

[Suggest changing description to ‘This report lists all MCIDs that have not provided ANY financial support for the selected year, but HAVE provided financial support in previous years.’]

Some Year BUT Not This Year(SYBUNTY) Report CLOSE													
This report lists all members that have provided financial support in previous years but have not provided any financial support for the given year.													
Select the Year:													
2014	<input type="button" value="CONTINUE"/>												

Some Year BUT Not This Year(SYBUNTY) Report CLOSE															
Historical sponsors PRIOR TO but NOT Reporting anything for 2014 -1377 for a total of \$11,129,549. DOWNLOAD CSV FILE															
MCID	Category	Contribution	Latitude	Longitude	Street	Label Name	First	Last	Organization	Address	City	St	Zip	Phone	Email
QUMES	\$50,160	\$50,160	33.0000	-121.1122	9	Valerie E. Cummings	Valerie	Cummings		950 - 4th Ave	Sacramento	CA	95818-3204	(916) 442-1071	
HWYSA	\$21,524	\$7,409	33.0000	-120.0912	9	Held Foundation	Held	Foundation		PO Box 13259	San Luis Obispo	CA	93485-3249		kristenheld@outlook.com
CONAD	\$5,000	\$5,000	33.0000	-121.0515	8	Seaworld Conservation	Seaworld	Conservation		9114 S Park Dr	Oceanside	CA	92054-4930		
DYN12	\$14,250	\$10,000	33.0000	-121.0816	9	Steven Gossman	Steven	Gossman	Dreyer's Inc LLC	1760 Encinares	Morro Bay	CA	93442		
JWZS	\$11,024	\$2,004	33.0000	-123.1321	3	Nancy Stage	Nancy	Stage	Executive Journalist	233 Grandola Dr Ste D	San Luis Obispo	CA	93441	(805) 541-4264	execstage1@ptd.net
PC15A	\$8,293	\$8,293	33.0000	-122.0910	3	Suz Fifer	Suz	Fifer	Daley Law Firm	1342 State Parkway	Inverness	CA	92018	(415) 379-6508	
BAN3A	\$8,750	\$8,750	33.0000	-122.0830	9	Bank America	Bank	of America		1300 Market St	Pensington	NJ	08534-4127		
PEC2B	\$5,390	\$100	33.0000	-123.1031	3	Anthony Pechman	Anthony	Pechman		2860 Alascadero	Berro Bay	CA	93442	(805) 772-1229	tmpeacham@stoptotal.net

32. Reports→Monthly Report—changes(?)

[Suggest changing description to ‘This report provides a statistical Year-To-Date (YTD) summary of Membership, Funding and Correspondence for the year ending in the supplied year-month.’]

[Entered year-month then clicked the CONTINUE button.]

Monthly Report CLOSE													
This will provide a summarization for the "Year to Date" (YTD), last calendar month and the current month of membership and funding information.													
Use this as the Year and month for this report:													
2015-05	<input type="button" value="CONTINUE"/>												

[Clicked the CLOSE button.]

Monthly Report [CLOSE](#)

Monthly Report for: May, 2015

Report created: June 20, 2015

Membership Summary

Records in DB	2839
Inactive records in DB	138
Mbr records with NO funding activity	88
New records added(YTD)	277
New records added(YTD) by status:	Contacts: 10 Members: 125 Volunteers: 71 Donors: 71
New Mbrs and Vols in May, 2015 (by amount paid)	\$0.00: 1 \$8.00: 1 \$20.00: 4 \$26.00: 12 \$35.00: 1 \$40.00: 3 \$50.00: 6 \$62.00: 1 \$100.00: 5 \$200.00: 1 \$250.00: 1
YTD membership by month:	2015-01: 25 2015-02: 30 2015-03: 48 2015-04: 35 2015-05: 41 2015-06: 17

Funding Summary

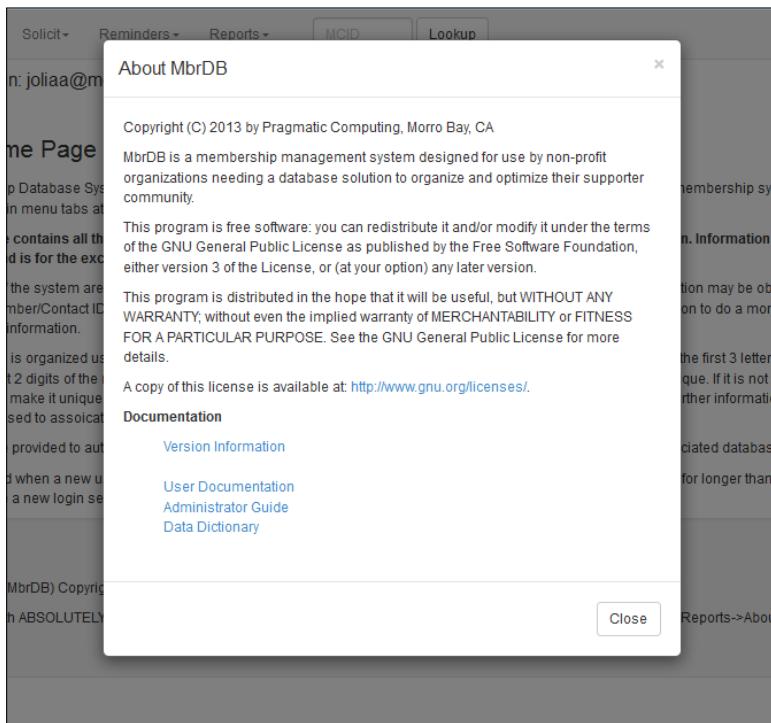
Total Funding Records	12386
Current paid-up members	783
YTD Funding Rec Count	1137
Current Expiration Date	2014-07-01
Member expiration distribution: (NOTE: number of members expiring each month.)	2014-06: 37 2015-01: 26 2015-08: 34 2015-09: 53 2015-10: 49 2015-11: 162 2015-12: 83 2016-01: 51 2016-02: 68 2016-03: 59 2016-04: 84 2016-05: 91 2016-09: 1 2016-11: 5 2021-12: 1
2015 YTD Program Distribution	Dues: \$34,920 (834) DirDon: \$3,111 (24) Donation: \$9,798 (121) Prgrincome: \$12,697 (111) InKindDon: \$152 (4) Grant: \$3,800 (2) FundRaising: \$7,070 (27)
May Program Distribution	Donation: \$3,005 (35) DirDon: \$1,471 (6) Dues: \$7,259 (149) FundRaising: \$405 (7) Prgrincome: \$3,563 (24)
May Total funding:	\$16,104
YTD Total funding - All Purposes	\$71,548.96

Correspondence Summary

Total Correspondence Rec Count	14811
2015 YTD Correspondence records	4331
Corr Types	Newsletter: 1397 RenewalPaid: 833 DonationTY: 197 RenewalTY: 130 EmailReminder: 445 Other: 33 NewMemberTY: 103 RenewalReminder: 10 MailReminder: 218 MbrInactive: 119 EOYTalRcp: 88 EmailLog: 2 FollowUp: 1 PVPostcard: 1 Mailing: 1 EventInfo: 843
Correspondence sent in May	
Total items sent:	333
	RenewalPaid: 148 DonationTY: 24 RenewalTY: 13 EmailReminder: 59 NewMemberTY: 15 RenewalReminder: 4 Other: 8 MailReminder: 25 MbrInactive: 7

— END OF REPORT —

33. Reports→About MbrDB—



[Text below was copied from above screen. Suggested changes and spelling corrections are highlighted.]

About MbrDB

Copyright (C) 2013 by Pragmatic Computing, Morro Bay, CA

MbrDB is a membership management system designed for use by non-profit organizations needing a database solution to organize and optimize their supporter community.

This program is free software: you can redistribute it and/or modify it under the terms of the GNU General Public License as published by the Free Software Foundation, either version 3 of the License, or (at your option) any later version.

This program is distributed in the hope that it will be useful, but WITHOUT ANY WARRANTY; without even the implied warranty of MERCHANTABILITY or FITNESS FOR A PARTICULAR PURPOSE. See the GNU General Public License for more details.

A copy of this license is available at: <http://www.gnu.org/licenses/>.

Documentation

[Version Information](#)

[User Documentation](#)

[Administrator Guide](#)

[Data Dictionary](#)

Close