Membership Database System (MbrDB)

Introduction to Administrative Functionality

The Membership Database (MbrDB) has been developed to provide non-profits:

- A web based system for standardized, easy access, ,
- Implemented using OSF (e.g. license free) software such as PHP, mySQL5, LibreOffice, etc.
- Incorporate the ability to access the system from a PC, tablet or smart phone,
- Improve and add business processes for membership managementreminders and follow-ups.

The following paragraphs detail the various administrative functions that have been incorporated to support the new version.

Registration as Administrative User

The ability to have access to the following administration menu items, the user id must be registered as an administration user.

Administration Menu Items

Admin Functions

If the user has the appropriate security registration, a button labeled 'Admin' will appear on the home page. Clicking this button will produce a special menu with the following choices.

Home Page
Returns user to the main menu.

Admin Users

User registration is accomplished using this menu item. Clicking the item will provide a page that has two sections: the top one used to introduce a new user to the database, the lower section lists all existing users currently registered with the option of individually deleting them by clicking the delete icon on the left of the listing line.

Introduction of a new user is done by simply entering the users email address, initial password (defaulted to 'raptor'), selection of an appropriate 'role' from the drop down selection list. Notes regarding the user may also be optionally entered noting information such as name, phone number, etc.

Currently, user roles defined are:

- MbrDB Admin – MbrDB administrator functionality is provided to this user. A user with this role will be provided the additional admin menu on the initial or 'home' page of MbrDB after successful login.

- MbrDB EDIUser – normal MbrDB user PLUS ability to add/update/delete Extended Donor Informaiton.
- MbrDB User – normal MbrDB user
- Volunteer Admin – this user is a provided the same MbrDB permissions s a regular user but also acts as the administrator of the Volunteer Time Entry (VTE) system described in a different document. It should be noted that this administrator role may not perform administration functions on MbrDB, only within and for the VTE system.
- Volunteer User – this user is provided the ability to view volunteer information and to create email messages and send them to one or more of the defined mailing lists.

It should be noted that no 'edit' function is provided for user registration. If any change is needed for a specific user then the existing registration record for that user should be deleted and a new on entered with the changes needed.

Maintain Lists

Various lists are required for the operation and customization of MbrDB. This menu item provides the user interface to edit these various lists. Clicking the 'Maintain' menu option on the admin menu will provide a completely new menu of options listing the various lists that are maintained using this facility.

All lists except the 'Admin Users' menu item text files containing text used to create pages that allow direct selection lists utilized within MbrDB. These selection lists are the choices presented to the user when they are selecting which one of a variety of options should be applied to a specific MCID, funding or correspondence record.

The easiest and best way to update these lists is to highlight and copy an existing list item and paste it into the list at the position desired before modifying that options information to make it unique.

Each correctly completed option should have the format of:

xxxxx:YYYYYYYYYYYY where:

- **xxxxx** denotes the value written to the database, and
- **YYYYY** denotes the prompting information presented to the user in the drop down.

Blank lines and lines that begin with '//' are ignored. The '//' lines are intended to be used as comments.

Please note that certain list values are key values used in the processing of web pages and reports of MbrDB. Care should be taken when making changes, especially deletions. It is recommended that list items be commented out (precede the line with '//') to drop its inclusion in the list rather than physically deleting the line altogether.

Lists supported are:

- **Mbr Types**

  This list defines the corresponding associated type of contact, member, volunteer or donor defined by the value setting of the 'Member Status' field which is a numeric value of 0, 1, 2 or 3 respectively.

  It should be noted that the first character of each Mbr Type defined begins with the number that is used to associate it to the corresponding Mbr Status value.

  Any new value introduced should begin with a number 0 through 3 to provide this association. Page level javascript code enforces the correct selection of the Mbr Type depending on the value of the 'Mbr Status' by comparing the numbers and will not allow the page to be successfully submitting until these number match. Therefore, defining a new option into this list without a beginning 0, 1, 2, or 3 will cause updating of member information to stop.

  Careful consideration of should be undertaken prior to adding a new member type into the list. Specific understanding of what is to be accomplished by additional options should be known in conjunction with specific reporting requirements

- **Funding Purposes**

  This is the first of three categories used to designate and summarize all funding provided to the organization from all sources, for all reasons.

  The 'Funding Purpose' is the top-most of these categories and is usually used to define the purpose that the organization will apply to the funds being provided.

- **Funding Programs**

  A 'Funding Program' is defined as a 'sub-category' to the 'Funding Purpose' and is used to further define the specific source of the funding provided. Each 'Program' is directly associated with a 'Purpose' for tracking and reporting purposes.

NOTE: introduction of a new Purpose and/or Program should be carefully considered based on reporting and tracking requirements.

NOTE: page level javascript assures that an appropriate selection for the 'Funding Program' is made in conjunction with the 'Funding Purpose'. This is accomplished by using the first 3 characters of the values of each field.

- Funding Campaigns

The 'Funding Campaigns' category is used to identify the source or prompting reason that can be identified to trigger the action of providing funds to the organization. Fund raising efforts can be best evaluated based on the amount of funds they generate. Each funding effort should be identified uniquely so that funds generated can be attributed to the effort.

Reporting facilities are able to report on specific amount and date ranges for recurring events (like annual open houses, annual events, etc.) so they do not have to be individually entered. Rather a specific date range for a specific event will isolate the relevant funding records.

- Correspondence Types

  This selection list of options are utilized in the 'Correspondence' records for an MCID and records that type or contact or correspondence that has been initiated.

  It should be noted that a new correspondence records is created when the 'Reminder' menu selection of 'Send Email Notice' or 'Send Mail Notice' is selected to initiate one or the other of these actions. Additionally, an automatic option is added to the 'Correspondence Types' named 'Reminder' to make sure that this option is always present for the user to choose.

  Correspondence records are analyzed to determine if there are any 'in-progress' reminders that require follow-up actions.

Templates

Reminder templates are utilized when initiating automatic reminder within MbrDB. There are two types of templates:

- Email templates – provide the 'boilerplate' verbiage that the organization has determined appropriate to use when notices regarding dues or membership are generated and sent. One or more templates may be created. All templates created are listed in a drop down selection menu during the initiation of the reminder notice. The template verbiage is presented to the user and can be modified prior to being sent.

- Mail Templates – provides the 'boilerplate' verbiage that the organization has determined appropriate to use for notices to be printed and sent via regular mail. Notices created for mailing are logged onto a special database queue for printing.

Database Activity Log

This is a listing of the activity log created and updated by the system when any user initiates any activity.

DB Janitor

This button is used to access a page of advanced database janitor functions that are beyond the scope of this document. Specific knowledge of the system is needed prior to being provided access.

How it works

This section of the documentation is provided to give an explanation of the automatic reminder process implemented in MbrDB.

The overall objective is to keep the listing of 'expired' memberships to a minimum. If it is obvious, after repeated reminders, that the support is not going to provide financial support on an regular, dues paying basis, they should be reclassified to ba a 'Contact' (non-dues paying) or 'Donor' (non-dues paying) type members.

Keeping the membership roles current and up to date will ultimately provide the optimal benefit to the organization.

Reminders

Reminders → Expired Listing

The concept of this functionality is to provide the organization with the ability to easily identify those supporters that have enrolled for an annual 'membership' subscription. Initiation and follow-ups are performed using the 'Reminders' item on the main menu.

The process is initiated by selecting the 'Reminders → Display Expired'. This will produce a report page displaying all the MCID's for which there has been no payment marked as 'Dues' received after the expiration period. The expiration period is system define as 11 months to provide a 1 month period during which contact with the supporter can be initiated.

The 'Expired' listing lists Members by default. Other supporter groupings can be displayed by selecting them from the drop down menu on the report page. The listing may also be optionally sorted with the oldest expirations at the top or the latest at the top using the drop down option provided.

Expirations are determined by examination of the 'Funding' records for every MCID in the database that contain the character string 'Dues' in the 'Purpose' field of the record. All those records are then analyzed to determine if the payment date is within the last 11 months. If not, the MCID is included on the listing along with other information that will assist in the reminder process. For example, the MCID information regarding contact method (mail and email) is displayed to assist in determination of the best/preferred method for send a reminder. The amount and date of the last 'Dues' payment is displayed along with an indication of any prior reminders that have been previously sent.

Finally, the MCID is a link to all information about the supporter. Clicking the link will make the associated MCID 'active' and allow full access to all information about the MCID including the funding and correspondence records.

Reports → List In-progress Reminders

This report merely provides a quick listing to all MCID's that have had prior reminders initiated for them. The listing displays the date of the last reminder sent and a count of how many have been sent during this reminder period. Again, a radio button is provided on the left of the list to make the associated MCID 'active' allowing the display and analysis of all information related.

Consideration should be made to mark an MCID as 'Inactive' after a certain number of reminders have been logged.

Send E-mail Notice to MCID

The quickest and most direct method to communicate with the supporter is to send them an email notice.

To initiate an email notice to one or more listed on the Reminders listing:

- Check off each MCID to whom a reminder is to be sent.
- Once all MCID's for a specific reminder template has been selected, click the 'Send Email' button at the bottom of the column.
- Select the appropriate email template to use for those selected.
- After the template is selected and the 'Submit' clicked, the proposed email message is displayed for review and customization. Note that all the supporters email addresses selected are listed in the 'TO:', the users email address is 'FROM' and the subject line is the name of the template chosen.
- The subject and body of the letter may be modified as needed.
- Clicking the 'Submit' button will cause the final message to be sent. A confirmation message is produced when all listed have been sent.

The system notes that the e-mail reminder has been sent to each selected by creating a note in the 'Correspondence Type'' column of the correspondence table of the database along with the date and time of the action.

Reminders → Send Mail Notice to MCID

For all intents and purposes, this action produces exactly the same processing steps as previously described for e-mail notices EXCEPT that the value logged into the 'Correspondence Type' field is noting a mail reminder AND the information from the template plus all mailing information is written into a special 'queue' on the database called the 'labelsandletters' queue for retrieval and printing.

Reminders → Print Labels and Letters

This menu action will produce a page that will allow for the printing of either the labels or the letters that have been accumulated in the 'labelsandletters' queue.

To print labels click the Submit button in the section titled 'Print Labels'. This will produce a web page output in the browser formatted for direct printing to label stock.

NOTE: special configuration of the page margins for the web browser being used is necessary to allow proper printing of the labels on sheet labels stock. The formatting provided is for Avery 5160 or equivalent stock. This provides 30 labels per page. The page margins should be defined as: Top: 0.5in, Bottom: 0.0in, Left: 0.0in and Right: 0.0in. All browsers have the capability to provide these settings.

In the event that a partial page of labels is available merely place the number of 'blank' labels counting from the upper left across and enter that number it the 'Labels to skip' box. Place the partial page as the first page for printing.

To print letters merely click the 'Submit' button on that section of the page. Check the box if you would like to print the letterhead logo. Leave the check box empty if printing on pre-printed letterhead.

Click to List and Delete Items

This function appears at the bottom of the 'Print Labels and Letters' page only when there are items in the 'labelsandletters' queue. Clicking this button will provide a list of those items in the queue which can then be collectively or individually deleted.

IMPORTANT: there are a couple of things to keep in mind when printing.

- Labels can also be used for letters as well as post cards, etc.
- Printing the form letters uses exactly the same information queue used for labels.
- Items in the queue should be deleted as soon as all labels and/or letters have been printed to prevent duplicate mailing.

Merely click another menu item on the Main Menu to continue the work flow.