R E : M EMBER S UPPLEMENT

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RE:Member for Membership Tracking

RE:Member enhances **The Raiser's Edge for Windows** (from here on referred to as **The Raiser's Edge**) by giving you the ability to track multiple memberships, produce reports to analyze membership activity, print lists and directories of members, and perform specific mailing functions such as preparing membership cards and renewal notices. In addition, you can locate lapsed members, drop members who have not responded to renewal notices, upgrade or downgrade memberships, and renew members who wish to remain active. With *RE:Member*, you can organize and handle all of your membership-related needs easily.

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Establishing Membership General Information

You must establish certain settings in the program before you can begin tracking memberships.

➢ **To establish membership general information:**

1. Open *Configuration*.

2. Select the General 2 tab. The following screen appears.

3. Select the **Automatically Generate Membership ID's** option to automatically generate IDs for membership.

4. Click the **Membership Cards** button to select the name to default on the membership cards – **From Constituent Record**, **From Addressee Table**, or **Use Keyname**. The program displays your selection to the right of the **Membership Cards** button.

Setting Up a Membership Category

Membership Categories represent the different levels of membership (for example, a Lifetime Member, Corporate Member, Individual Member, etc.). Parameters define the category within this facility. Each category has a minimum and maximum gift amount, a grace period for renewal, and the time frame for dropping a membership.

➢ **To add a new membership category:**

1. Open *Configuration*.

2. Select the Membership Cat tab.

3. Click **Add**, and the following screen appears.

Add a Membership Category		
Description: Friends of the Museum		**Default Benefits**
Membership Dues		**Benefits**
Dues Level: $100.00		Member Newsletter
Minimum Dues: $100.00	**Maximum Dues:** $100.00	10% Shop Discount
Default Fund: Annual Fund 1996		
Expires After: 12 Month(s)		**Default Receipt Amount**
		○ Use Gift Amount
		⦿ Use Other Amount
		$80.00

Renewal Information

	Letters	Comment	#	Renew	Before/After
	Friends First Renewal Letter	First Renewal	2	Month(s)	Before Expiration
	Friends Second Renewal	Second Renewal	3	Week(s)	Before Expiration
	Friends Final Notice	Last Chance to Renew	1	Month(s)	After Expiration

Drop After: 3 Month(s)

[OK] [Cancel]

4. Enter a **Description** or name for the Membership Category (for example, Friends of the Museum, Lifetime, Corporate Member, Individual, Family, etc.).

5. In the **Dues Level** field you can further define the dues level for the Membership Category.

6. Enter the **Minimum Dues** or minimum donation the member must make to join at this level. This field automatically formats currency amounts.

7. Enter the **Maximum Dues** or maximum donation for the membership level. This field automatically formats currency.

8. The **Default Benefits** box lets you define premiums members receive for joining at this level. When you enter a membership for this category you have the option of accepting the **Default Membership Benefits,** or you can enter a different set of benefits.

9. For receipting purposes, *The Raiser's Edge* allows you to determine a **Default Receipt Amount**. You can either choose **Use Gift Amount** to print the amount the member paid, or you can indicate a specific amount in the **Use Other Amount** field.

10. Indicate a **Default Fund** to which membership donations should be applied. This is used for a membership gift with no fund specified.

11. **Expires After** defines the membership's life span. For example, if a membership expires after nine months, enter 9 in the first block and select ⬇ to choose months. The program uses **Expires After** to calculate the expiration date of the membership.

12. The **Renewal Information** box lets you establish a schedule for sending renewal notices to constituents. The **Renewal Information** defines which letter to send and when to send it.

13. In the **Letter Code** column, select the document to send as the first renewal. Enter any comments in the **Comment** column.

14. In the **#** and **Renew** columns enter how long the program should wait before sending a renewal notice.

15. You can also decide whether to send the notice **Before** or **After** the membership expires.

    In the following example, the first renewal notice is sent three months before the membership expires; the second one month prior to the membership's expiration date.

	Letter Code	Comment	#	Renew	Before/After
	First Membership Renewal	First Renewal Notice	3	Months	Before Expiration
	Second Membership Renewal	Second Renewal Notice	1	Months	Before Expiration ⬇

16. At the **Drop After** prompt, indicate the grace period between the time you send the last renewal and when the program should drop the membership. Enter the number and click ⬇ to select days, weeks, months, or years from the list.

17. When finished, click **OK**.

Working with an Existing Membership Category

Editing a Membership Category

➢   **To edit a membership category:**

1.   Open *Configuration*.

2.   Select the Membership Category tab.

3.   A list of existing membership categories appears. Highlight the one you want to edit and select the **Edit** button.

4.   When finished, click **OK**.

Deleting a Membership Category

➢   **To delete a membership category:**

1.   Open *Configuration*.

2.   Select the Membership Category tab.

3.   A list of existing categories appears. Highlight the one you want to delete and select the **Delete** button. A verification message appears.

4.   Click **Yes** to delete the category.

Note: The system will not let you delete a membership category present in one or more constituent records.

Inserting a Membership Category

Inserting a membership category adds a new category at a particular point in the membership categories list.

➢   **To insert a membership category in the table:**

1.   Open *Configuration*.

2.   Select the Membership Category tab.

3. A list of existing categories appears. Highlight the point where you want to insert the new category and select the **Insert** button.

4. Follow the steps for Setting Up a Membership Category in this manual.

5. When finished, click **OK**.

Constituent Management Membership Preferences

There are some user preferences in *Constituent Management* specifically related to managing memberships.

➢ **To establish user preferences for managing memberships:**

1. Open *Constituent Management*.

2. Select **Edit** from the menu bar.

3. Select **Preferences** and the General Preferences screen appears. There are two membership related preferences:

   • **Default Membership Category Based On Dues Amount:** An X in this box assigns membership categories automatically based on the gift amount. This is only available for systems configured for *RE:Member*.

   • **Load Gift When Membership is Saved:** This prompt automatically loads a gift record when you save the membership so you can make changes to the fields on the gift. This option is not available when adding a membership given by another constituent.

Adding a New Membership to a Constituent's Record

In *Constituent Management*, you enter and maintain membership for your constituents by using the Membership tab found in each record. All membership maintenance activities – from establishing a new membership to dropping a member – are performed from this tab.

The **New Mem** button enables you to establish a new membership for a constituent. You should add a new membership only for a first-time membership. If a constituent has a lapsed membership in this category, you need to rejoin the membership, not add a new one.

➤ **To add a new membership:**

1. Open *Constituent Management*.

2. Select **File, Open** to locate the constituent's record. Select the Member tab. A list of memberships appears.

3. Select **New Member**. The following screen appears.

4. In the **Membership Dues** field, enter the amount the constituent paid for the membership.

5. In the **Category** field, select the membership category. The membership category represents the different levels of memberships for your organization. For example, select Lifetime Member, Family Membership, Individual Membership, President's Council, etc.

Note: You establish membership categories in *Configuration*. For more information, see the section on Setting Up Membership Categories in this manual.

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6. In the **Date Joined** field, enter the day the membership begins.

7. The **Expires On** date fills in automatically when you enter the **Date Joined**. The program calculates the **Expires On** date using the time entered in the **Expires After** field in the membership category in *Configuration*.

8. The **Membership Cards Printed** box indicates whether the member's cards have been printed. If you print membership cards from *The Raiser's Edge*, the program automatically marks this prompt.

9. If you select the **Automatically Generate Membership ID's** prompt on the General 2 tab of *Configuration*, a unique membership number appears in the **Membership ID** box. If you did not choose to automatically generate this ID, you can enter an identification in this box.

10. Select the **Create Link to Gift** prompt to have the program automatically generate a gift for this membership. If you select this prompt, a gift is generated and linked to the membership.

11. If you choose the **Create Link to Gift** prompt, indicate the **Gift Type** you wish to add: Cash, Pledge, Stock, Gift in Kind, and Other. Also, indicate the **Fund** to which this gift should be attributed. The **Gift Amount** defaults to the amount entered in the **Membership Dues** field. The **Gift Date** defaults to the current date.

12. The **Benefits** list shows the different premiums the member receives for joining at this level. For example, benefits might include discounts, free tickets, coffee mugs, umbrellas, etc. The **Load Category Defaults** button automatically assigns the benefits you established in *Configuration* for the membership category. If you choose to **Load Defaults**, you can still edit the list.

13. The **Renewals Sent** button lets you view any renewal letters sent to the member. You cannot edit from this screen – it is view only. The program pulls this information from *RE:Mail*. If no renewal notice has been sent, this button is grayed out.

Note: For more information on sending renewal notices, refer to the Mailings and Correspondence chapter in this manual.

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14. A membership can be purchased and given by one constituent to another as a gift. If the membership is a gift from another constituent, select the **Gift of Membership** button. The following screen appears.

15. In the **Given By** prompt, click [↑] to search for the constituent who gave the membership. The Constituent Search Criteria Screen appears allowing you to locate the appropriate record. The donor must have a record in the database in order to use this option.

16. Determine if the **Donor** or **Member** should receive the renewal notice.

17. When finished, click **OK**.

18. When finished in the New Membership screen, click **OK**.

Linking a Gift to a Membership

Memberships do not require gifts, but you do have the option of linking a membership to gifts.

➢ **To link a membership to a gift:**

1. Open *Constituent Management*.

2. Select **File**, **Open** to locate the constituent's record. Select the Gifts tab. You can either **Add** a new gift or **Edit** an existing one.

Note: Refer to the Tracking Gifts chapter in *The Raiser's Edge for Windows User's Guide* for information about entering gifts.

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3. To link the gift to a membership select **Gift**, **Membership** from the menu bar; the following screen appears.

4. If the membership is for another constituent, select the **Yes** button and the Constituent Search Criteria screen appears. If this is a membership for the constituent whose record is already open, select the **No** button. The following screen appears.

Action	Date	Category/Drop Comment	Expires On	Dues
JOINED	6/16/94	Individual	6/16/95	$40.00

Memberships for Rebecca B. Aaron

Membership: Individual

Buttons: New | Renew | Rejoin | Upgrade | Downgrade | Link | OK

5. Several buttons allow you to manipulate the membership record:

New
The **New** button enables you to establish a new membership for a constituent. You should add a new membership only when a constituent is beginning their first membership within a category. If a constituent has a lapsed membership in this category, you need to rejoin the membership.

Renew
This button renews the constituent's membership. Renewing a constituent's membership keeps it active. Use this only if the member has not been dropped. A constituent can **Renew Upgrade** into a higher category, **Renew Downgrade** into a lower category, or **Renew Same** to stay in the same membership category.

Rejoin
The **Rejoin** button returns a dropped member to active membership status.

Upgrade
Upgrading a constituent's membership transfers a current membership to a higher membership level. This is not a renewal. For example, a constituent joins at the family level and decides three weeks into their membership to upgrade to a lifetime family membership.

Downgrade **Downgrading** a constituent's membership transfers a current membership to a lower membership level. This is not a renewal. For example, a constituent joins at the family level and decides three weeks into their membership to downgrade to an individual membership.

Link The **Link** button enables you to link a gift record to a current membership record.

Note: The **Link** button is disabled if the constituent does not have a current membership record. You can click **New** to add a new membership and link it to the gift.

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6. Select the button you need. For a new member, the following screen appears.

Add a New Membership for Jonathon P. Ashley ☒

Current Member Information

Category:	Standing:	Membership ID:
Date Joined:	Last Renewed:	Expires On:

Membership Dues: [_____]   ☐ **Membership Cards Printed**
Category: [_____] ⏷   Membership ID: [_____]
Date Joined: [10/30/98]
Expires On: [_____]

☒ **Create Link to Gift**
Gift Type: [Cash ▼]
Fund: [_____] ⏷
Gift Amount: [_____]
Gift Date: [10/30/98]

Benefits
[_____ ▼ ▲]
[Load Category Defaults]

[**OK**]   [**Cancel**]   [Renewals Sent]   [**Gift of Membership...**]

7. Follow the steps for Adding a New Membership found in this manual.
8. When finished, click **OK**.

Deleting a Membership

Deleting a constituent's membership wipes the membership from the constituent's record and leaves no record of the membership. Use this only when you want to remove the member and their history entirely from the database. If the member has simply lapsed, you should use the **Drop** option.

➢ **To delete a membership:**

1. Open *Constituent Management*.

2. Select **File**, **Open** to locate the constituent record. Select the Member tab. A list of memberships appears.

3. Highlight the membership you want to delete and select the **Delete Mem** button.

4. A verification screen appears. Click **Yes**.

Renewing a Membership

Renewing a constituent's membership keeps their membership active. Use this only if you have not dropped the member. A constituent can **Renew Upgrade** into a higher category, **Renew Downgrade** into a lower category, **Renew Same** to stay in the same membership category.

➢ **To renew a membership:**

1. Open *Constituent Management*.

2. Select **File**, **Open** to locate the constituent record. Select the Member tab. A list of current memberships appears.

3. Highlight the membership renewing and select the **Renew** button. The
    following appears.

4. The **Current Member Information** box gives you a picture of the current
    membership. It includes information such as the current **Membership
    Category** as well as when the member joined, when the member renewed last,
    and when the membership expires.

5. In the **Membership Dues** field, enter the amount the constituent paid for the
    membership.

6. At the **Category** prompt, select the membership category. For example,
    Membership Categories could include Lifetime Member, Family Membership,
    Individual Membership, President's Council, etc.

Note: You establish membership categories in *Configuration*. See the section on
          Setting Up Membership Categories in this manual.

7. Enter the **Renewed On** date for the membership.

8. The **Expires On** date fills in automatically when you enter the **Date Joined**.
    The program calculates the **Expires On** date using the time entered in the
    Expires After field in the **Membership Category** in *Configuration*.

9. Select the **Create Link to Gift** prompt to have the program automatically
    generate a gift for this membership.

10. If you chose the **Create Link to Gift** prompt, indicate the **Gift Type** you wish to add. Your choices are Cash, Pledge, Stock, Gift in Kind, and Other. Also, indicate the **Fund** to which this gift should be attributed. If you do not select a fund, it defaults to the **Default Fund** you established for the membership category in *Configuration*. The **Gift Amount** defaults to the amount entered in the **Membership Dues** field. The **Gift Date** defaults to the current date.

11. The **Membership Cards Printed** box indicates whether membership cards for this membership have been printed. An X in this box indicates the cards were printed. If you print membership cards from *The Raiser's Edge*, the program automatically marks this prompt after it successfully prints the cards.

12. A constituent may choose the level at which they wish to renew their membership. For example, the constituent can choose to stay at the same membership level or upgrade or downgrade. The **Renew Type** enables you to track the type of renewal.

    • **Upgrade**: The constituent renews at a higher membership level than their current membership.

    • **Downgrade**: The constituent renews at a lower membership level than their current membership.

    • **Same**: The constituent renews their membership at the same membership level.

13. The **Membership Benefits** represents the different premiums the member receives for being a member at this level. For example, this might include discounts, free tickets, coffee mugs, umbrellas, etc. The **Load Category Defaults** button automatically assigns the benefits established in *Configuration*. If you choose to load defaults, you can still edit the list.

14. A constituent may purchase a membership as a gift. If the gift membership is from another constituent, select the **Gift of Membership** button. The following screen appears.

15. In the **Given By** prompt, click on [↑] to search for the giving constituent. The Constituent Search Criteria Screen appears, allowing you to locate the appropriate record.

16. Determine who to **Send Renewal Notice to** by placing an X in the appropriate box. You can send to either the **Donor, Member** or both. To select both, click on both options.

17. When finished, click **OK**.

18. When finished in the Renew a Membership screen, click **OK**.

Dropping a Membership

Dropping a membership allows you to keep a record of the constituent's past membership activity but no longer show them as an active member.

➢   **To drop a membership:**

1. Open *Constituent Management*.

2. Select **File**, **Open** to locate the constituent record. Select the Member tab.

3. A list of current memberships appears. Highlight the membership you wish to drop and select the **Drop** button. The following appears.

4. The **Current Member Information** gives you a picture of the current membership.

5. At the **Reason** prompt, select a reason for dropping the membership. For example, you might enter inactive, death, relocated, not happy with benefits, etc.

6. In the **Dropped On** prompt enter the date you dropped the membership.

7. Enter any additional **Comments** about the dropped membership.

8. When finished, click **OK**.

Globally Dropping Members

The **Drop Lapsed Members** option lets you drop a group of members from active membership. The system uses the parameters you established for the membership categories in *Configuration* to determine which members to drop. We strongly recommended you perform a backup prior to using this option.

➢ **To drop lapsed members:**

1. Open *Database Administration*.

2. Select **File**, **Drop Lapsed Members** on the menu bar. The following screen appears.

3. In the **Lapsed on or Before** field, specify the cut-off date for dropping members. The program drops any member lapsed on or prior to this date, provided the membership lapsed beyond the grace period defined in the membership category.

4. Enter the **Drop Information**. The **Date Dropped** is the date you performed the global drop. Select the **Reason** you dropped the member. The **Comment** section lets you enter a more detailed description of the write-off.

5. If you want a report outlining the parameters and the number of members dropped, select the **Print Dropped Members Control Report** option.

6. When finished, click **OK**.

Rejoining a Dropped Membership

You rejoin a dropped membership when a dropped member becomes active again.

➢ **To rejoin a dropped membership:**

1. Open *Constituent Management*.

2. Select **File**, **Open** to locate the constituent record. Select the Member tab. A list of memberships appears.

3. Highlight the dropped membership and select the **Rejoin** button. The following appears.

Rejoin a Membership for Jonathon P. Ashley

Current Member Information

Category: Family   Standing: DROPPED   Membership ID:

Date Joined: 5/30/98   Last Renewed: Date Dropped: 10/30/98

Membership Dues: $200.00   ☐ Membership Cards Printed

Category: Family

Rejoined On: 10/30/98

Expires On: 10/30/99

☒ Create Link to Gift

Gift Type: Cash

Fund: Capital Campaign Plant F

Gift Amount: $200.00

Gift Date: 4/29/98

Benefits

Member Newsletter
10% Shop Discount

Load Category Defaults

OK   Cancel   Renewals Sent   Gift of Membership...

4. Enter the information just as you would when adding a membership.
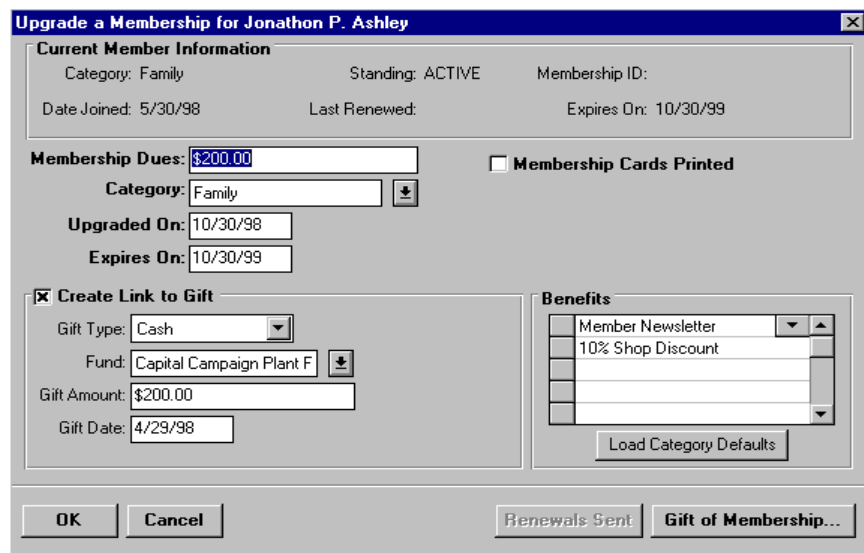
Upgrading a Membership

Upgrading a constituent's membership transfers a current membership to a higher membership level. For example, a constituent joins at the individual level and decides three weeks into their membership to upgrade to a family membership.

➢ **To upgrade an active membership:**

1. Open *Constituent Management*.

2.	Select **File**, **Open** to locate the constituent record. Select the Member tab. A list of memberships appears.

3.	Highlight the membership to upgrade and select the **Upgrade** button. The following screen appears.

4.	Follow the steps for adding a membership.

Downgrading a Membership

Downgrading a constituent's membership transfers the membership to a lower membership level. For example, a constituent joins at the family level and decides three weeks into their membership to downgrade to an individual membership.

➢	**To downgrade an active membership:**

1.	Open *Constituent Management*.

2.	Select **File**, **Open** to locate the constituent record. Select the Member tab. A list of memberships appears.

3.	Highlight the membership to be downgraded and select the **Downgrade** button.

4.	Enter the **Dues** amount and the new **Category**. The **Downgrade On** date appears automatically.

5.	When finished, click **OK**.

Defining Membership Card Information

The **Mem Card** button allows you to define who receives a membership card in addition to the member.

➢ **To define membership card information:**

1. Enter the membership if it does not already exist. (For more information, see the Adding a New Member section in this chapter.)

2. From the Member tab of the constituent's record, select the **Mem Card** button. The following screen appears.

3. Indicate the name to print on the card by either typing it into the **Name on Card** column, or use the drop-down button to select from an existing list. The drop-down screen includes names from the Relation tab for individuals or names from the Contacts tab for organizations. The member is automatically included. If you do not specify a **Name on Card**, the program uses the **Default Membership Card Addressee** you defined on the General 2 tab in *Configuration*.

4. Enter the **Relationship/Contact Code,** which defines the connection between the member and the cardholder. For example, if the cardholder is the sister of the member, enter Sister.

5. Select the **Print Member Address** prompt to include the address on the card.

6. Indicate the **# Cards** to print.

7. When finished, click **OK**.

Membership Benefits

The **Benefits** button on the Membership tab of the constituent's record displays the benefits assigned to the highlighted membership. You can add to or remove benefits from this list.

Membership Benefits
Benefits
Member Newsletter
10% Shop Discount
10% off Guest Tickets

OK   **Cancel**

Reviewing Membership Details

The **Mem Details** button reports a history of all activity related to the highlighted membership. When you highlight a membership and select this button, a window appears listing all the activity, starting when the membership first began to when it was renewed. This is a history of activity and appears for informational purposes only.

Membership Details for Rebecca B. Aaron

Action	Date	Category/Drop Comment	Expires On	Dues
JOINED	6/16/94	Individual	6/16/95	$40.00
RENEWAL	10/11/95	Friends of the Museum	10/11/96	$100.00

View   **Delete**   **OK**

C H A P T E R   2
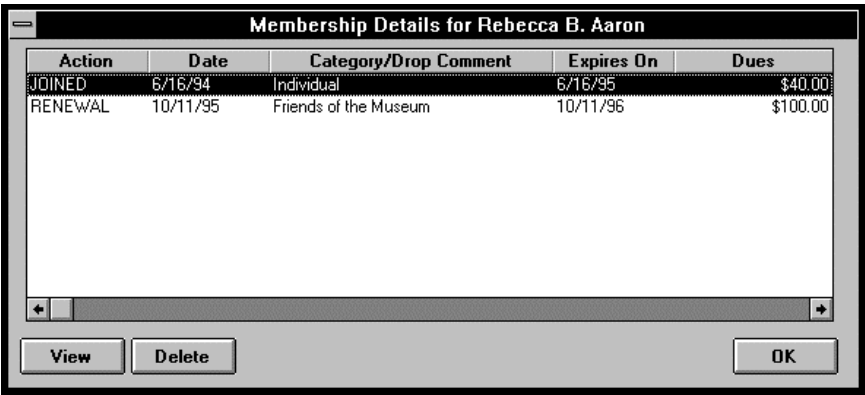
Membership Mailings and Correspondence

For systems configured with *RE:Member*, you have the option of running Renewal Notices, Membership Cards, and the Membership Card Truncation report. These functions appear in the *RE:Mail* program of **The Raiser's Edge**. Both Renewal Notices and Membership Cards can be produced through the program using forms available from Blackbaud, or you can export a data file to use with your word processor's mail merge option.

In This Chapter

- *RE:Mail* Membership Parameters
- Printing Renewal Notices
- Producing Membership Cards
- Membership Card Truncation Report

RE:Mail Membership Parameters

General Tab Parameters

The following parameters apply to *RE:Mail's* Membership Cards, Print Renewal Notices, or both.

Standard or Custom Cards

Select **Standard Cards** if you want to print membership cards directly from *The Raiser's Edge* onto cards purchased from Blackbaud. Select **Custom Cards** if you plan to use your word processor to customize your membership cards. If you select **Custom Cards**, the **Custom Fields** tab becomes active.

Standard or Custom Renewals

Select **Standard Notices** if you want to print membership renewals directly from *The Raiser's Edge* onto forms purchased from Blackbaud. Select **Custom Notices** if you plan to use your word processor to customize your membership renewals. If you select **Custom Cards**, the **Custom Fields** tab becomes active. From this tab you can select the fields to send to your word processor.

Note: For more information on purchasing renewal notices and membership cards from Blackbaud, call 1-800-468-8996, ext. 2220.

Constituents/Records to Include

Determine whether you want **All Records**, **Selected Records,** or **One Record** processed for the cards. If you choose **Selected Records**, you have to select a query to use. If you choose **One Record**, the Constituent Search Criteria screen appears, allowing you to search for the record.

Start Date/End Date

In the **Start Date** and **End Date** fields, enter the date range for the memberships you want to process. The program processes membership cards for memberships starting within this date range. For renewal notices, the program processes memberships expiring in this date range.

Date of Notice

Enter the date to print on the renewal notice.

Include Membership Types

The Include Membership Types frame lets you select the memberships you want to include. You can select any or all of the Membership Types listed (i.e., **New**, **Renew**, **Upgrade**, etc.).

Create Constituent Query

If you want the system to create a query of the constituents processed, mark this checkbox.

Include only those Memberships that have an Associated Gift

If you want to **Include only those Membership that have an Associated Gift**, mark this checkbox. When marked, the system only processes memberships with dues added as gifts.

Form Type

Indicate the type of form you ordered from Blackbaud:

- **One Third**: These standard forms do not have a free-form message area.

- **Two Third**: These forms have an area for 20 lines of free-form text.

- **Full Page**: These forms have an area for 42 lines of free-form text.

For laser printers

Mark this option to print the notices on a laser printer. The *Membership Scanning* program supports only bar codes printed with a laser printer.

Note: For specific information on other parameters, please refer to the Understanding Common Parameters section in the *RE:Mail* chapter of *The Raiser's Edge for Windows User's Guide*.

Format Tab Parameters

Card Type

The Card Type frame lets you choose the format you wish to use for membership cards. There are two types:

- **Data Mailer:** This special multi-part form combines the envelope and membership card.

- **Insert:** These forms come with cards attached. The insert is designed for use with a windowed envelope.

Omit Punctuation

Mark this checkbox to remove all punctuation from the card or form.

For Laser Printers

Mark this option to print the cards on a laser printer. The *Membership Scanning* program supports only bar codes printed with a laser printer.

Print Bar Code

When you mark this option, the membership bar code prints at the bottom of the membership card in 12-point, 3-of-9 bar code font. The bar code consists of a fourteen-digit, internal ID (assigned by *The Raiser's Edge*), followed by a validation digit. The program formats IDs with less than seven digits with leading zeros.

Print ID on Card/Notice

You can choose to include an ID on the card or renewal notice. Select either **None, Social Security #, Membership ID,** or **Constituent ID.** If you want it to print under the name, mark the **Print Under Name** checkbox.

Order

Indicate whether the notices should print in **Date** order or in **Alphabetical** order by marking the option next to your choice.

Custom Fields Tab Parameters

When you select Custom Cards or Custom Renewal Notices, the Custom Fields tab becomes active. From this tab, you can choose the fields you wish to send to your word processor for your membership cards or renewals. For example, you can send the membership type, membership category, membership start date, etc.

The **Mark Letters as Sent** option places the name of the letter sent into the Renewal Letters screen on the member's record along with the date the letter was sent. The **Exclude Members whose scheduled renewal has already been sent** option prevents the member from receiving the same renewal notice twice. This option depends on the renewal schedule you establish on the Membership Cat tab in *Configuration*. You must check the **Mark Letters as Sent** option for this option to work.

For example, if in *Configuration* you decide members should receive their first renewal notice three months before their membership expires, the second two months before, and the third one-month before, the program tracks this requirement. Using the **Run Notices Dates** you establish ensures members never receive the same letter twice, as well as, ensuring they do not receive more than one letter per assigned time period. This allows you use the program to send out letters daily or weekly without duplicating the letters you already sent to members.

Some fields, **Fund** for example, have additional **Parameters** or filters you need to define. When you select the field, a parameter screen appears asking certain questions. Answer the questions and click **OK**. If you want to change the parameters, simply highlight the field and click **Parameters**.

Note: For more information on establishing membership category schedules, refer to the Membership Category section of the *Configuration* chapter in *The Raiser's Edge for Windows Administrator's Guide*.

Note: For more information on printing membership cards and the fields on the Custom Fields tab, refer to the *RE:Mail* chapter of *The Raiser's Edge for Windows User's Guide* or refer to the section on producing Membership Cards in this manual.

Categories Tab Parameters

In the Membership Categories to Include frame, indicate whether **All Categories** or **Selected Categories** should be included.

If you choose **Selected Categories**, select the Categories to Include from the Categories box.

Printing Renewal Notices

You can print **Renewal Notices** either through *The Raiser's Edge* on forms available from Blackbaud or by sending a data file to your word processor and using its mail merge function. Renewal notices are prepared for members whose memberships expire within a specified date range.

For **Standard Renewal Notices** (printed from *The Raiser's Edge*), there are three types of forms available: one-third page form, two-third page form, and full page form. The size you select determines the number of free-form text lines available for a message. One-third page forms have no free-form text area; two-third page forms have 20 lines of free-form text; and full page forms have 42 lines of free-form text.

➢ **To produce renewal forms:**

1. Open *RE:Mail*. The Select Mailing Function screen appears.

2. Highlight **Print Renewal Notices.** Click **OK**.

3. Fill in the appropriate parameters.

4. Select 🖶 to print. Select 🔍 to preview the form on the screen before printing.

Producing Membership Cards

You can print **Membership Cards** either through *The Raiser's Edge* on cards available from Blackbaud or by sending a data file to your word processor and using its mail merge function. There are two types of Standard Membership Cards available from Blackbaud:

- **Data Mailers:** Special multi-part forms combining both membership cards and envelopes.

- **Inserts:** Forms with membership cards attached to insert into windowed envelopes.

➢ **To print membership cards:**

1. Open *RE:Mail*. The Select Mailing Function screen appears.

2. Highlight **Print Membership Cards**. Click **OK**.

3. Fill in the appropriate parameters.

4. Select 🖶 to print. Select 🔍 to preview the cards on the screen before printing.

Membership Card Truncation Report

The **Membership Card Truncation Report** lists members whose information may be too long to fit on a membership card. This report only applies for cards printed from *The Raiser's Edge*. The report measures the length, from left to right, and the lines, from top to bottom, of the information on a card format to determine if it fits. The report prints a list of what may be truncated. The test includes the addressee/salutation and the address.

➢ **To print the Membership Card Truncation Report:**

1. Open *RE:Mail*. The Select Mailing Function screen appears.

2. Highlight **Membership Card Truncation Report**. Click **OK**.

3. Fill in the appropriate parameters.

4. Select 🖨 to print. Select 🔍 to preview the report on the screen.

C H A P T E R   3

Membership Reports

The *RE:Member* optional module includes reports to help analyze membership trends, produce lists and directories, identify lapsed members or first-time members, report income generated by memberships and much more. The information gathered from these reports is useful in determining future strategies for soliciting new memberships and maintaining active members.

Note:	For more examples and a description of these reports, refer to the Membership Reports section of the *Raiser's Edge for Windows Reports* manual.

In This Chapter

- Membership Report Parameters
- Running a Membership Report
- Membership List by Category
- Membership List by Type
- Membership Directory
- New Member Report
- Renewal Report
- Rejoin Report
- Lapsed Member Report
- Membership Given by Report
- Dropped Membership Report
- Membership Dues Report
- Membership Statistics by Category
- Comparative Membership Statistics
- Monthly Statistical Analysis
- Renewal Projection Report

Membership Report Parameters

One of the advantages of using *The Raiser's Edge* is the consistency of the program. This consistency is particularly evident in the report parameters. Each report has a set of criteria or parameters that define the output.

Below is a list of report parameters by tab. Not all reports have every tab; not every report parameter applies to all of the reports listed.

Membership Report Parameters tabs include:

- Address Parameters
- Appeals Parameters
- Campaigns Parameters
- Constituency Parameters
- Contacts Parameters
- Format Parameters
- Funds Parameters
- General Parameters
- Gift Types Parameters
- Membership Categories Parameters

Address Parameters

Address to Print
In the Address to Print frame, indicate which address you want the system to include on the report. You can **Base** the address **On Criteria**, choose to print the **Primary Address** (i.e., home address for individuals, business address for organizations), the **Business Address** (Business Address for individuals and Primary Address for organizations), or choose **None** to exclude the address from printing. If you select **Base on Criteria**, the program includes only addresses meeting the criteria you specify in the Address tab in *Reports* and Bio 1 and Bio 2 tab in *Constituent Management*. The address selected must have one of the **Types of Mail** you select, and must have a **Seasonal From/Seasonal To** and **Date From/Date To** valid as of the date entered in the **'As Of' date for alternate addresses**.

Note: For detailed information about how the system processes addresses, refer to Understanding Address Processing in the Correspondence and Mailings chapter in *The Raiser's Edge for Windows User's Guide*.

Print Phone

If you wish to include the phone number on the report, mark the **Print Phone** checkbox. In the **Type** field, select the phone number you wish to include.

'As Of' date for Alternate Addresses

The **'As Of' date for Alternate Addresses** field allows you to select the proper address based on the date entered in the **Seasonal From/Seasonal To** and **Date From/Date To** fields in *Constituent Management*. The system searches all of the addresses for the one that falls within these dates.

If No Address is Found

If No Address is Found matching the criteria, additional information is required. Determine whether the report should **Use Primary Address** (home address for individuals, business address for organizations), **Use Business Address**, or **Print with No Address**.

Appeals Parameters

Appeals parameters determine the appeals to include in the report. Only gifts given to the appeals you select appear on the report. In the Appeals to Include frame, indicate whether to include **All Appeals** or **Selected Appeals**. If you choose **Selected Appeals**, you need to pick the Appeals to Include from the Appeals box.

Campaign Parameters

Campaign parameters determine which campaigns to include on the report. Only gifts given to the campaigns you select appear on the report. In the Campaigns to Include frame, indicate whether **All Campaigns** or **Selected Campaigns** should be included in the report. If you choose **Selected Campaigns**, pick the Campaigns to Include from the Campaigns box.

Constituency Parameters

Constituencies
In the Constituencies frame, indicate whether to base the report on **All Constituencies** or **Selected Constituencies**. If you choose **Selected Constituencies**, you need to pick your Constituencies to Include from the Constituencies box.

Contacts Parameters

For organization records with contacts, you can determine the contacts, if any, to process. Indicate whether to include **All Contacts**, **Selected Contacts,** or **None**. If you choose **Selected Contacts**, you need to choose the Contacts to Include.
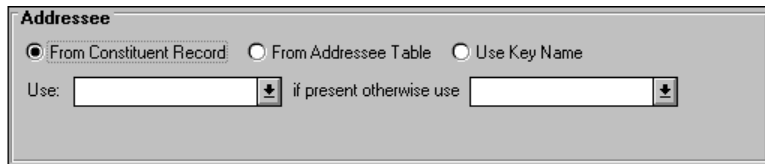
- **Print One for Each Contact**: Enables you to print one label, envelope, etc. for each contact, meeting your criteria.

- **Print Contact Name**: You can choose whether or not to print the contact's name.

Format Parameters

Addressee
Indicate the format of the Addressee or names of the constituents.

- **From the Constituent Record:** When selected, the following appears.

You need to identify the addressee/salutation to use for the constituent and an alternative to use if the first choice is not there. If neither exists, the program defaults to key name.

- **From Addressee Table:** When selected, the following appears.

Click 🔽 to select an addressee from the table.

- **Key Name:** The names of the constituents appear in the format of first name, middle initial, last name (i.e., John M. Jones).

Note: For information on the Addressee Table, see Configuring Addressee/Salutations in *The Raiser's Edge Administrator's Guide*.

Report Type
This prompt allows you to choose between a **Detail** report, **Summary** report, or **Both**. A **Detail Report** lists constituents; a **Summary Report** gives only totals.

Print One Category Per Page
If you want each Membership Category to print on a separate page, mark this checkbox.

Print One Type Per Page
If you want each Membership Type to print on a separate page, mark this checkbox.

Include Dropped Members
Marking this checkbox allows you to include members with expired memberships that have been dropped from your active rolls.

Include Lapsed Members
Marking this checkbox allows you to include members with expired memberships who have not been renewed or dropped.

Print Maiden Name
If you want the report to include the constituent's maiden name, select this prompt.

Report Criteria
The Report Criteria summarizes the parameters used to create the report. You can determine whether the parameters appear on the **First Page** only, **All Pages**, or **None**.

Report Order

Indicate the desired Report Order by selecting either **Date** or **Alphabetical**. If you select **Date**, the system uses the **Gift Date** to determine the order of the constituents on the report. The constituent appears once for each gift with a gift date that falls within the start and end dates of the report.

Subheading

The report **Subheading** is an optional field that prints at the top of the report. You can use this field to title the report.

Include Income Amount

Marking this checkbox includes the total income on the report.

Include Start and Lapsed Members

Indicate whether you want to include **Start Members** − the total number of all memberships not dropped before the beginning date of the report − and **Lapsed Members** − members whose memberships expired and have not renewed or been dropped.

Create Output Query

Marking this checkbox allows you to create a query of the constituents on the report. The program creates a static query.

Note: You can use this query with other modules in *The Raiser's Edge*. For example, you may send mailings to constituents for solicitations or thank you letters, or run a financial report based on the output query created. The program prompts you to name the query once you process the report.

Funds Parameters

Funds parameters determine which funds to include on the report. Only gifts given to the funds you select appear on the report. In the Funds to Include frame, indicate whether **All Funds** or **Selected Funds** should be included in the report. If you choose **Selected Funds**, you need to pick the Funds to Include from the Funds box.

General Parameters

Records to Include
The **Records to Include** field allows you to base the report on a query established in *RE:Query*. Only records included in the query are processed. Leave this field blank to process all records in your database.

Report Start Date/Report End Date
Enter the **Report Start Date** and **Report End Date**. These dates perform different functions depending on the report.

- **Renewal Report:** The **Start Date** and **End Date** limit the memberships processed to those with an expiration date falling within the date range.

- **Rejoin Report:** These dates limit the memberships processed to those rejoined in the date range.

- **New Member Report:** These dates limit the memberships processed to first-time memberships within the date range.

- **Dropped Member Report:** The report processes memberships dropped within the specified date range.

Members As Of
The **Members As Of** field represents the date that defines the memberships to include. Only members that have an active membership as of this date are included in the report.

Start Month/Year and End Month/Year
This field allows you to enter the time periods for which you want a projection. For example, to project renewal income from June to August of 1999, enter 6/99 and 8/99.

Include on the Report
Indicate whether you want **Start Members** – the total number of all memberships not dropped before the beginning date of the report; **End Members** – the total number of all memberships not dropped before the last day of the report; or **Both** included in the report.

Hi End Threshold (%)
This field allows you to enter a high-end projection for renewing members. For example, you may project that 80% of members will renew during 1999.

Mid Level Threshold (%)

This field allows you to enter a median projection for renewing members. For example, you may project that 50% of the members will renew during 1999.

Low End Threshold (%)

This field allows you to enter a minimum projection for renewing members. For example, you may project that at least 30% of the members will renew during 1999.

Lapsed On or Before

In the **Lapsed On or Before** field, enter the date that determines which lapsed membership to include. Only memberships lapsed on or before this date are included on the report.

Include only those Memberships that have an Associated Gift

Mark **Include only those Memberships that have an Associated Gift** to limit the memberships included in the report to memberships linked to a gift. If you want to include all memberships, do not mark this checkbox.

Include Membership Types

This frame allows you to select the Membership Types you want to include in the report. You can select any or all of the Membership Types listed. Your choices are:

- **New**: Anyone who has joined for the first time.

- **Rejoin**: A dropped member who rejoined.

- **Renew**: An active member continuing their membership.

- **Upgrade**: Moves a current member to a higher level.

- **Downgrade**: Moves a current member to a lower level.

Credit Gifts of Membership to

This frame allows you to define who receives credit for a membership purchased as a gift. Choose **Donor** if you want the person who paid the dues to appear or **Member** if you want the person who received the membership to appear.

Periods to Compare

Enter up to five date ranges you want to compare for your report. Be sure your dates do not overlap.

Gift Types Parameters

Select the gift types you would like to include. The plus (✛) sign to the right of the gift type indicates there are several gift types which make up the summary type shown. Double click on the plus sign to reveal the gift types making up the summary gift type. For example, **All Cash** is actually Regular Cash, Pledge Payment–Cash, and Matching Gift Payment–Cash. You may select the summary gift type (i.e., All Cash, All Pledges, etc.), or you can select one of the specific gift types (i.e., Cash, Pledge, etc.).

Use the arrow buttons to move the highlighted Type of Gift to the Gift to Include box. Continue these steps until you have defined all columns on your report.

Use Pledge Balances
The **Use Pledge Balances** checkbox is only active when you choose the gift type of Pledges for your report. When selected, the system includes only the remaining balance instead of the entire pledge amount. For example, if you have a pledge of $500 and the constituent has paid $300, the balance of $200 is included in the report. If you do not mark this checkbox, the entire $500 pledge is reported.

Membership Categories Parameters

Membership Categories parameters allow you to select the Membership Categories to include in the report. Only the membership categories you select are processed for the report.

Running a Membership Report

➢ **To run a membership report:**

1. Open *Reports.*

2. The Select Report screen appears. Under the column **Report Types**, highlight **Membership Reports**. A list of associated reports appears in the column titled **Report Names**.

3. Highlight the report you want to run and click **OK**.

4. Fill in the appropriate parameters.

5. Select **File**, **Preview** to preview the report before printing, or select **File**, **Print** to print the report.

Note: If you choose to preview the report before printing, the menu bar and file options are inactive. To print from the Preview screen, click at the bottom of your screen.

Membership List by Category

The **Membership List by Category** lists constituents in groups based on their **Membership Category**. The report allows you to include address information. If a constituent is a member in two categories, that constituent appears in both lists. Dates are used to limit the scope of the report.

Anson Heritage Foundation

Membership List by Category as of 6/30/95

Membership Type(s): Joined, Renewal, Rejoined, Upgrade, Downgrade

Lifetime

Rebecca B. Aaron
Mr. and Mrs. Victor H. Hanson

2 Lifetime Listed

Bronze Leaf Society

Thomas A. Cooper
Mr. and Mrs. Michael J. Sawyer
Miss Mary E. Simpson

3 Bronze Leaf Society Listed

Patron Leaf Society

Margaret E. Reynolds
Mrs. Jane Stewart
Mr. Alfred Q. Washington

3 Patron Leaf Society Listed

Benefactor

Mr. James L. Barlow
Jean P. Marshall
Mr. and Mrs. Robert H. Porton
Mr. and Mrs. Michael J. Simpson

4 Benefactor Listed

Family

Mr and Mrs. Jonathon M. Richards
Ms. Janice E. Robertson
Mr. Thomas G. Simpson
James B. Steel

4 Family Listed

Membership List by Type

The **Membership List by Type** lists constituents in groups based on their **Membership Type** (i.e., renew-upgrade, renew-downgrade, new member, etc.). You can include address information on the report. Dates are used to limit the scope of the report.

Anson Heritage Foundation
Membership List by Type as of 6/30/95

Membership Type(s): Joined, Renewal

New	*Category*
Rebecca B. Aaron 2344 Ruby Road Charleston, SC 29401	Lifetime
Mr. James L. Barlow 123 Main Street Mount Pleasant, SC 29464	Benefactor
Mr. and Mrs. Victor H. Hanson 951 Dillard Avenue Wheaton, CA 96094	Lifetime
Mr. and Mrs. Jonathon M. Richards 7500 Richie Lane Brooklyn, NY 30391	Family
Miss Mary E. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	Bronze Leaf Society
Mr. Thomas G. Simpson 389 Oak Branch Road Charleston, SC 29401	Family
James B. Steel 3462 Palm Boulevard Mt. Pleasant, SC 29464	Family

7 New Listed

Renewal Upgrade	*Category*
Margaret E. Reynolds 348 Senate Lane Charleston, SC 29403	Patron Leaf Society
Ms. Janice E. Robertson 437 Serenity Lane Mt. Pleasant, SC 29484	Family

2 Renewal Upgrade Listed

Membership Directory

The **Membership Directory** gives you a list of all members with a current membership within a specified date range. You can limit the report to specific **Membership Categories** and **Types**.

Anson Heritage Foundation
Membership Directory as of 6/30/95

Page 1

Membership Type(s): Joined, Renewal, Rejoined, Upgrade, Downgrade

Rebecca B. Aaron 2344 Ruby Road Charleston, SC 29401	Lifetime	Until 6/16/55
Mr. James L. Barlow 123 Main Street Mount Pleasant, SC 29464	Benefactor	Until 5/22/95
Thomas A. Cooper 2501 Canyon Road Aspen, CO 30398	Bronze Leaf Society Elizabeth	Until 1/ 1/95
Mr. and Mrs. Victor H. Hanson 951 Dillard Avenue Wheaton, CA 96094	Lifetime Anne	Until 5/15/55
Jean P. Marshall 39 Banyan Drive Hilo, HI 96720	Benefactor Jason	Until 3/25/95
Margaret E. Reynolds 348 Senate Lane Charleston, SC 29403	Patron Leaf Society Robert	Until 5/15/96
Mr. and Mrs. Jonathon M. Richards 7500 Richie Lane Brooklyn, NY 30391	Family	Until 12/ 4/95
Ms. Janice E. Robertson 437 Serenity Lane Mt. Pleasant, SC 29484	Family Daniel	Until 5/15/96
Miss Mary E. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	Bronze Leaf Society Michael	Until 5/15/97
Mr. and Mrs. Michael J. Sawyer 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	Benefactor Mary	Until 3/25/95
Mr. Thomas G. Simpson 389 Oak Branch Road Charleston, SC 29401	Family Jordan	Until 3/ 1/96
James B. Steel 3462 Palm Boulevard Mt. Pleasant, SC 29464	Family Ann	Until 1/ 1/96

New Member Report

The **New Member Report** prints a list of constituents with new memberships starting within the date range you specify. You can limit this report by **Membership Categories**.

6/30/95	**Anson Heritage Foundation**			Page 1
	New Member Report			

From 6/1/95 to 6/30/95

Member Name	Category	Joined On	Renew
Mr. and Mrs. Victor H. Hanson 951 Dillard Avenue Wheaton, CA 96094	Lifetime	5/15/95	5/15/55
Miss Mary E. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	Bronze Leaf Society	5/15/95	5/15/97
Mr. Thomas G. Simpson 389 Oak Branch Road Charleston, SC 29401	Family	3/ 1/95	3/ 1/96
James B. Steel 3462 Palm Boulevard Mt. Pleasant, SC 29464	Family	1/ 1/95	1/ 1/96

4 Member(s) Listed

Renewal Report

The **Renewal Report** lists constituents whose memberships have been renewed within the date range specified. This report helps track change in membership type (e.g., upgrade, downgrade, etc.).

5/31/95   **Anson Heritage Foundation**   Page 1
                              Renewal Report

From 5/1/95 to 5/31/95

Member Name	Category	Renewed On	Renewal Type
Margaret E. Reynolds 348 Senate Lane Charleston, SC 29403	Patron Leaf Society	5/17/95	Upgrade
Janice E. Robertson 437 Serenity Lane Mt. Pleasant, SC 29484	Family	5/22/95	Upgrade

2 Upgrade(s)
0 Downgrade(s)
0 Stayed the Same

2 Member(s) Listed

Rejoin Report

The **Rejoin Report** lists constituents who were dropped from active membership, but have rejoined within a specified date range. A rejoin transaction is required to move a member from a dropped status to an active status.

Anson Heritage Foundation

Rejoin Report

Page 1

From 5/1/95 to 5/31/95

Member Name	Category	Rejoined On	Renew On
Nancy C. Barry 1300 South Windermere Drive Anderson, SC 29601	Benefactor	5/ 12/95	5/ 12/96
Kelly Davis # 8 Saint James Avenue Birmingham, AL 99900	Family	5/22/95	5/22/96

2 Member(s) Listed

Lapsed Member Report

The **Lapsed Member Report** lists members whose memberships lapsed prior to the date entered in the **Lapsed On or Before** field.

Member Name	Category	Renewal
Thomas A. Cooper 2501 Canyon Road Charleston, SC 29498	Bronze Leaf Society	1/ 1/95
Jean P. Marshall 39 Banyan Drive Charleston, SC 29405	Benefactor	3/25/95
Michael J. Sawyer 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	Benefactor	3/25/95

3 Member(s) Listed

Membership Given By Report

The **Membership Given By Report** lists constituents who have received their memberships as gifts. A date range is used to limit the scope of the report.

Anson Heritage Foundation

Membership Given by Report

Page 1

From 6/1/95 to 6/30/95
Membership Type(s): Joined, Renewal, Rejoined, Upgrade, Downgrade

Member Name	Category	Date Given	Given By	Notice To
James L. Barlow 123 Main Street Mount Pleasant, SC 29464	Benefactor	5/22/94	Karen D. Haggard	Donor
Thomas G. Simpson 389 Oak Branch Road Charleston, SC 29401	Family	3/ 1/95	Rebecca B. Aaron	Donor

2 Member(s) Listed

Dropped Member Report

The **Dropped Member Report** lists constituents dropped from active membership. The constituents selected are included if the date falls within the date range specified in the report parameters.

5/31/95	**Anson Heritage Foundation**		Page 1
	Dropped Member Report		

From 5/1/95 to 5/31/95

Member Name	Category	Dropped On	Reason Dropped
Nancy C. Barry 1300 South Windermere Drive Anderson, SC 29601	Benefactor	5/ 1/95	Left Area
Elizabeth A. Cooper 2501 Canyon Road St. George, SC 30398	Benefactor	5/ 12/95	Left Area
Kelly Davis # 8 Saint James Avenue Mount Pleasant, SC 99900	Family	5/ 17/95	Returned Check

3 Member(s) Listed

Membership Dues Report

The **Membership Dues Report** provides information regarding the income generated by memberships within a specified date range. The report is available in a detailed format. Constituents' names are listed with all memberships that fall within the specified date range. The summary report lists each membership category with the income generated within the date range.

6/30/95		**Anson Heritage Foundation**		Page 1
		Membership Dues Report		

From 1/1/95 to 6/30/95
Membership Type(s): Joined, Renewal, Rejoined, Upgrade, Downgrade

Member Name	Date Paid	Category	Renew	Amount Paid
Mr. James M. Richards 7500 Richie Lane Brooklyn, NY 30391	1/1/95	Family	1/1/96	100.00
Mr. and Mrs. James B. Steel 3462 Palm Boulevard Mt. Pleasant, SC 29464	1/ 1/95	Family	1/ 1/96	200.00
Nancy C. Barry 1300 South Windermere Drive Anderson, SC 29601	2/ 1/95	Benefactor	2/ 1/96	200.00
Mrs. Rebecca B. Aaron 2344 Ruby Road Charleston, SC 29401	3/ 1/95	Family	3/ 1/96	150.00
Victor H. Hanson 951 Dillard Avenue Wheaton, CA 96094	5/15/95	Lifetime	5/15/55	1,000.00
Margaret E. Reynolds 348 Senate Lane Charleston, SC 29403	5/15/95	Patron Leaf Society	5/15/96	200.00
Mr. and Mrs. Janice E. Robertson 437 Serenity Lane Mt. Pleasant, SC 29484	5/15/95	Family	5/15/96	150.00
Kelly Davis # 8 Saint James Avenue Birmingham, AL 99900	5/15/95	Family	5/15/96	50.00
Mary E. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	5/22/95	Bronze Leaf Society	5/22/97	500.00
				2,550.00

Membership Statistics by Category

The **Membership Statistics by Category** calculates the number of members in each **Membership Category** within the date range specified. For each category, the report breaks down the type of membership (i.e., new, renewed, rejoined, etc.). The income, the start members, and the end members are included.

Note: **End Members** include the total number of all members who were not dropped.

Anson Heritage Foundation
Membership Statistics by Category

From 1/1/95 to 6/30/95

Members prior to 1/1/95	New	Upgrade In	Renewals Upgrade Out	Down In	Down Out	Same	Upgrade In	Upgrade Out	Down In	Down Out	Rejoin	Lapsed	Dropped	Members as of 6/30/95	Income
Lifetime															
25	2	0	2	0	0	5	0	0	0	0	1	1	1	25	3,500.00
Bronze Leaf Society															
32	3	0	2	5	0	2	0	0	0	0	0	2	0	38	1,000.00
Patron Leaf Society															
60	3	1	0	0	0	4	1	0	0	0	0	0	0	63	2,000.00
Benefactor															
72	1	0	0	0	1	1	0	0	0	0	0	2	0	72	5,550.00
Family															
119	2	0	0	0	2	8	1	2	1	0	0	5	0	117	7,540
Individual															
312	6	0	0	0	3	18	1	0	0	0	1	8	2	314	4,015.00
620	17	1	4	5	6	38	3	2	1	0	2	18	3	629	23,605.00

Note: Unless your memberships have been dropped, they appear on this report. A lapsed membership is considered a member until dropped.

Comparative Membership Statistics

The **Comparative Membership Statistics** provides a comparison of **Membership Categories** for multiple time periods. The report calculates the start members, end members, and income generated, if requested. Each category is further broken down by **Membership Type** (i.e., new, renew, lapsed, etc.). This report is useful in analyzing the time period with the most membership activity and income.

The **Retention Rate** is calculated using the following formula:

$$\frac{\text{Start Members - Dropped Members}}{\text{Start Members}} \times 100$$

6/30/95 — **Anson Heritage Foundation** — *Comparative Membership Statistics* — Page 1

	1/1/94 to 6/30/94			1/1/95 to 6/30/95	
Start	**End**	**Income**	**Start**	**End**	**Income**
Lifetime					
37	30	9,000.00	25	25	7,500.00
Bronze Leaf Society					
14	21	4,200.00	32	38	7,600.00
Patron Leaf Society					
27	35	5,250.00	60	63	9,450.00
Benefactor					
55	61	6,100.00	72	72	7,200.00
Family					
78	94	9,400.00	119	117	11,700.00
Individual					
212	243	12,150.00	312	314	15,700.00
423	484	46,100.00	620	629	59,150.00

Type	1/1/94 to 6/30/94		1/1/95 to 6/30/95	
	#	**Income**	**#**	**Income**
New Members	12	4110.00	17	5,850.00
Renew - Upgrade	4	600.00	7	1,050.00
Renew - Downgrade	8	800.00	12	1,200.00
Renew - Same	37	7,500.00	48	9,805.00
Upgrade	10	2,500.00	14	3,500.00
Downgrade	7	700.00	14	1,400.00
Rejoins	29	2,900.00	35	3,500.00
Totals	107	19,110.00	147	26,305.00
Dropped	10	(2,000.00)	15	(3,000.00)
Lapsed	7	700.00	12	1,200.00
Retention Rate	83.33		90.00	

Monthly Statistical Analysis

The **Monthly Statistical Analysis** summarizes the membership activity by month. The report includes the income generated for each month, the number of start members, and/or lapsed members. You can determine whether you wish to include memberships with no associated gift.

6/30/95	**Anson Heritage Foundation** *Monthly Statistical Analysis*									Page 1
From 1/95 to 6/95										
Month	**Start**	**New**	**Renew**	**Rejoin**	**Upgrd**	**Dwngrd**	**Lapsed**	**Drop**	**End**	**Income**
January, 95	10	1	8	0	2	2	1	1	10	2,600.00
February, 95	11	2	6	1	1	0	7	1	11	3,105.00
March, 95	12	1	3	0	5	3	2	0	12	3,150.00
April, 95	12	3	12	0	0	1	1	0	12	4,750.00
May, 95	11	2	7	1	1	4	5	1	14	3,900.00
June, 95	14	8	18	0	1	2	2	0	14	6,100.00
		17	54	2	10	12	18	3		23,605.00

Note: Start members include the total number of members who were not dropped before the beginning date of the report.

Renewal Projection Report

The **Renewal Projection Report** helps you project income from membership renewals. You can set three percentages of renewal.

Anson Heritage Foundation
Renewal Projection Report

From 1/95 to 6/95

Period	Category	# to Renew	80% Renewed	50% Renewed	30% Renewed
January, 1995	Bronze Leaf Society	1	400.00	250.00	150.00
	Period Totals	1	0.00	0.00	0.00
March, 1995	Benefactor	2	1,600.00	1,000.00	600.00
	Period Totals	2	0.00	0.00	0.00
April, 1995	Benefactor	1	80.00	50.00	30.00
	Period Totals	1	0.00	0.00	0.00
May, 1995	Benefactor	2	200.00	125.00	75.00
	Period Totals	2	0.00	0.00	0.00
June, 1995	Individual	1	32.00	20.00	12.00
	Period Totals	1	0.00	0.00	0.00
December, 1995	Family	1	80.00	50.00	30.00
	Period Totals	1	0.00	0.00	0.00
	GRAND TOTALS	8	2,392.00	1,495.00	897.00

C H A P T E R   4

Membership Scanning: An Overview

In this Chapter

- Overview
- Preparing for Membership Scanning

Overview

Membership Scanning is designed to display and update membership information without making you access *Constituent Management*. It also determines a member's status and benefits when in a gift shop or at the door of a museum or event. *Membership Scanning* allows you to print a bar code on membership cards designed for laser printers. The bar code consists of a fourteen-digit, internal ID (assigned by **The Raiser's Edge**), followed by a validation digit. The IDs are formatted with leading zeros if either ID number is less than seven digits. When you scan the membership bar code into the **Scan ID** field in *Membership Scanning*, the membership information displays.

Membership information can also be configured to display differently based on the status of the membership. For example, dropped memberships may be displayed in a red, bold font while lapsed members show up in a blue, italic font. After scanning, you can choose to renew or rejoin members as well as update addresses.

Additionally, you can specify default actions to add to each member's constituent record. The actions appear on the Actions tab in *Constituent Management.* For example, each time a member of the museum attends an event and has their card scanned, the program can add the action to the constituent's record.

If you purchased the optional *Special Events* module*,* you may link the scanning session to a special event. This allows you to select the special event and enable warnings if attendees have not registered for the event. For example, a museum may have a dinner as a special event to celebrate the grand opening of a new exhibit. You can scan the membership cards to register attendees or update attendance for the event. The registration and attendance information appears in the *Special Events* module. In addition, you can view the events for which a constituent has registered or attended through the Events tab in *Constituent Management*.

You can restrict your users in *Membership Scanning*, but if a user has access to *Constituent Management*, the security established is the same for *Membership Scanning*. For example, if you do not have rights to edit memberships in *Constituent Management*, you cannot edit memberships in *Membership Scanning*. Additionally, if you do not have the rights to add, edit, or delete addresses in *Constituent Management*, you cannot add, edit, or delete addresses in *Membership Scanning*.

Also, *The Raiser's Edge* does not allow you to make changes that result in the breaking of membership rules. For example, if you drop a membership in *Constituent Management* while that member is renewing their membership in the *Membership Scanning* module, you receive a message, explaining a dropped member cannot renew a membership.

Note:	The scanner you purchase for *Membership Scanning* must be able to read a bar code of 15-19 characters in the font you choose.

Preparing for Membership Scanning

Before you begin using *Membership Scanning*, there are a few modules in *The Raiser's Edge* that require some attention. These modules are *Configuration, Constituent Management, RE:Mail,* and *Special Events* (if you have purchased the optional module *Special Events*).

Configuration

Setting up Security

Open *Configuration*, go to the Security tab, and click either **Add** or **Edit**. Mark the **Membership Scanning** checkbox in the Group Privileges frame. When checked, this option gives members of the security group access to the *Membership Scanning* module.

Note: The system administrator should complete this procedure within *Configuration*.

➢ **To assign/remove access to the *Membership Scanning* module:**

1. From *Configuration,* select the Security tab.

2. In the Groups frame, highlight the group to have access to membership scanning.

3. Click **Edit**. The Edit a Group screen appears.

4. In the Group Privileges frame, mark the **Modules** option. Scroll down to locate the **Membership Scanning** checkbox. Mark this checkbox to give a group of users the right to access this module. If you would like to restrict users from the module, click the box to remove the checkmark.

5. Click **OK**.

Note: Security rights established in *Configuration* for address additions, edits, etc. carry over into the *Membership Scanning* module. For example, if you do not have rights to delete an address in *Constituent Management*, you do not have rights to delete an address in *Membership Scanning*.

Constituent Management

Establishing Memberships

Before you can begin scanning membership cards, you must have a constituent record established for each member. Also, you can add information on memberships in *Constituent Management* on the Member tab.

Note: For more information on adding membership records in *Constituent Management*, see the chapter on Membership Tracking in this manual.
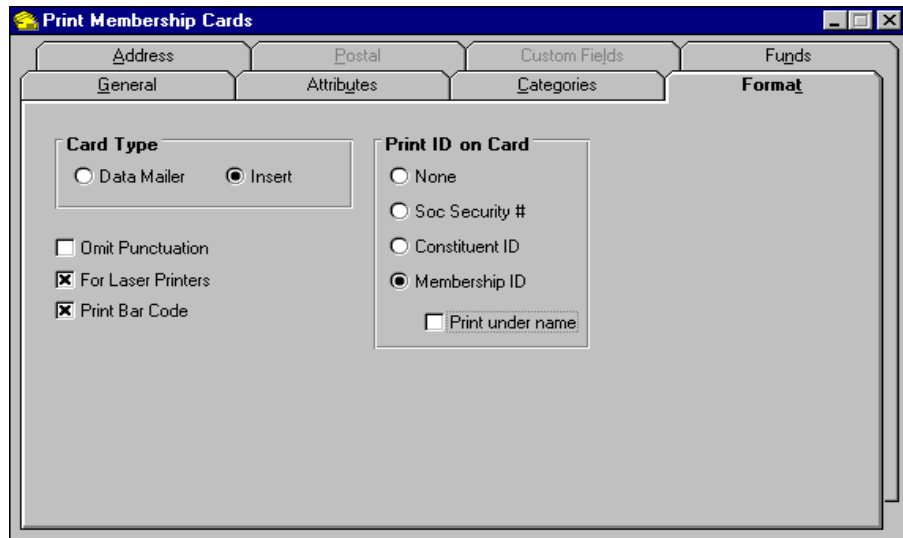
RE:Mail

Printing Membership Cards

You must print the membership cards from *RE:Mail* before you begin membership scanning. Information related to *Membership Scanning* is found on the Format tab and the Custom Fields tab under the **Print Membership Cards** option in *RE:Mail.*

Format Tab

To activate the Format tab, select the **Standard Cards** option on the General tab. On the Format tab, mark the **For Laser Printers** option to print the cards on a laser printer. The program supports only bar codes printed with a laser printer.

When you mark the **Print Bar Code** option, the membership bar code prints at the bottom of the membership card in 12-point, 3-of-9 bar code font. The bar code consists of a fourteen-digit, internal ID (assigned by *The Raiser's Edge*), followed by a validation digit. The program formats IDs with less than seven digits with leading zeros.

Custom Fields Tab

To activate the Custom Fields tab select the **Custom Cards** or **Custom Notices** option on the General tab. The Custom Fields tab allows you to choose the fields to be exported for your membership cards or renewal notices. You can then merge the fields with your custom membership cards. Use this feature if you do not want to use Blackbaud's pre-designed cards or forms.
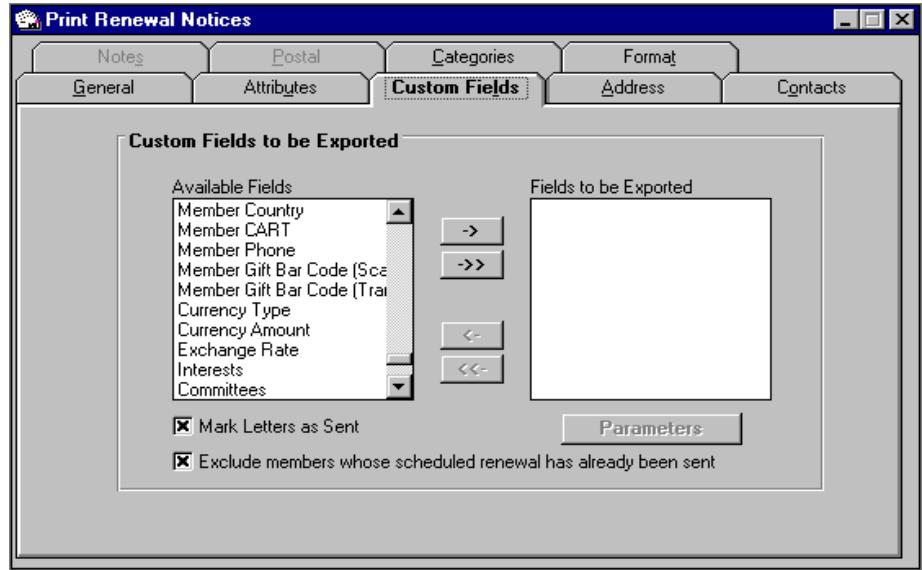
The fields Membership Bar Code (Scannable) and Membership Bar Code (Trans) are included in the list. The bar codes consist of the same internal IDs and check sum. The scannable bar code contains the asterisks and the translation does not. If you need to export the bar code number only, select the translation bar code (Membership Bar Code Trans) as your export.

When using the Print Renewal Notices function, the **Mark Letters as Sent** option places the name of the letter sent into the Renewal Letters screen on the member's record along with the date the letter was sent.

The **Exclude Members whose scheduled renewal has already been sent** option prevents the member from receiving the same renewal notice twice. This option depends on the renewal schedule you establish on the Membership Cat tab in *Configuration*. Also, you have to mark the **Mark Letters as Sent** checkbox for the program to know the member has already been sent a letter.

For example, if in *Configuration* you decide members should receive their first renewal notice three months before their membership expires, the second two months before, and the third one-month before, the program tracks this requirement. Using the **Renewal Information** you establish, the program ensures members never receive the same letter twice, as well as, not more than one letter per assigned time period. This allows you to use the program to send out letters daily or weekly without worrying about overlapping letters you already sent to members on a monthly schedule.

Note: For more information on establishing membership category schedules, refer to the Membership Category section of the *Configuration* chapter in *The Raiser's Edge for Windows Administrator's Guide*.

Note: For more information on printing membership cards and the fields on the Custom Fields tab, refer to the *RE:Mail* chapter of *The Raiser's Edge for Windows User's Guide* or refer to the section on Producing Membership Cards in this manual.

Special Events

Setting Up Your Events

If you have the optional module *Special Events*, you can link the scanning session to an event. For example, a museum may have a dinner to celebrate the grand opening of a new exhibit. You can scan the membership cards to register or update attendance for the event. The registration and attendance information appears in the *Special Events* module.

Once you have established your event in the *Special Events* module, you can then link the event to *Membership Scanning*. In addition, you can use the program to update attendance for the members when they attend the event and have their membership card scanned.

You can also view the events a constituent has attended or registered for through the Events tab in *Constituent Management*.

Note:　For more information on setting up your events, refer to the *Special Events* manual.

Membership Scanning

Establishing Start Up Properties

Although it is not required, before using *Membership Scanning* we recommend
setting defaults to minimize data entry and to keep the information added consistent
among members. You can configure the display of membership information to
quickly distinguish the membership status. For example, you can have the dropped
memberships appear in a red, italic font or active members appear in a blue, bold
font. Each time a member attends a function or event, you can add to the Actions tab
of the constituent record. Use **Start Up Properties** to set defaults for Actions and
establish what information is to be added.

The Start Up Properties screen appears automatically when you open *Membership
Scanning*. You can also access these options by selecting **Edit**, **Start Up Properties**
from the menu bar. The preferences and defaults established through Start Up
Properties are workstation-based.

Note: The **Link to Event** options are only available if you have purchased *Special
Events.*

Frames in Start Up Properties

Frame Name	Type*	Description
Active Member	O	This frame allows you to select the color of the font used on the card to display the **Name**, **Membership ID**, and **Member Name** of active members. In addition, you can choose to have the active memberships appear in **Bold**, **Italic**, or **Blink** after the membership cards are scanned.
Lapsed Member	O	This frame allows you to select the color of the font used on the card to display the **Name**, **Membership ID**, and **Member Name** of lapsed members. In addition, you can choose to have the lapsed memberships appear in **Bold**, **Italic**, or **Blink** after the membership cards are scanned.
Dropped Member	O	This frame allows you to select the color of the font used on the card to display the **Name**, **Membership ID**, and **Member Name** of dropped members. In addition, you can choose to have the dropped memberships appear in **Bold**, **Italic**, or **Blink** once the membership cards are scanned.

*Type: (R)equired, (O)ptional, (D)isplay-only, (B)utton

Field Name	Type*	Description
Add an Action	O	This option activates the **Automatically Add Action** and **Prompt to Add Action** options. It also enables the **Action** button, allowing you to enter the **Action Date** – a requirement before you exit the screen.
Automatically Add Action	O	This option adds an action to every constituent record retrieved. An action is added each time you scan a membership card.
Prompt to Add Action	O	This option generates a message after you scan the card, asking if you wish to add the default action to the constituent record. Clicking **Yes** brings you to the standard Action screen with all of the defaults. If you click **No,** the action is not automatically added but can be added by clicking the **Action** button. When you click the **Action** button the default information established in the Start Up Properties screen appears. You can then edit this information.

Note: For more information on the **Action** button, see the Action button section in this chapter.

Field Name	Type*	Description
Link to Event	O	Marking this option activates the drop-down box for **Event.** After this checkbox is marked, the **Event** is then required, as are **Warn if Registration is not Complete** and **Update Attendance for Registrants**. This option also activates the **Registrant** button.
Warn if Registration is not Complete	O	This option generates a warning screen after you scan the card of a member not registered for the linked event. The screen asks you if you wish to add the registrant now. Click **Yes** to load the Registrant screen with all the defaults. Click **No** to go back to the main Membership Scanning screen.
Update Attendance for Registrants	O	This option automatically marks the **Registrant has Attended** checkbox on the registrant record.

Note: For more information on the **Registrant** button, see the Registrant button section in this chapter.

Field Name	Type*	Description
Display Total	O	This option enables the **Running Count**, **Distinct Count**, and **Beginning with** fields. Either the number of successful scans (**Running Count)**, or the number of different successful scans (**Distinct Count)** display in the status bar with the totals calculated per workstation. If you enter a value for the **Beginning with** field, the **Running Count** or **Distinct Count** begin with the value entered.
Automatically Clear Screen	O	This option enables the **Clear screen every** field. Mark this option to have the information displayed on the main Membership Scanning screen cleared after the specified amount of inactive time. When the **Clear screen every** option is selected, the text box becomes enabled, allowing you specify how often the screen should be cleared. If you mark the **Automatically Clear Screen** checkbox, both of these controls are required.

Action Button

When you click the **Action** button from the Start Up Properties screen, the Edit Default Action screen appears. The **Action Date** is required and the information entered here is automatically added for each record retrieved while scanning, provided you chose the **Automatically Add Action** option in Start Up Properties. This is also the default information loaded if you choose to manually add the action. This Action screen is only slightly different from the Action screen found on a constituent record. If you do not add an action at scan time, you can still add the default action from the main Membership Scanning screen. The fields that function differently from the standard action screen are described below.

In this screen you must select an **Action Date.** The program automatically transfers the information you enter here to each scanned record, provided you selected the **Automatically Add Action** option on the Start Up Properties screen.

Note: For more information on the standard fields found on the Action screen, see the Action tab section in the *Constituent Management* chapter of *The Raiser's Edge for Windows User's Guide*.

Field Name	Type*	Description
Action Date	R	Choose Scan Date or User Date. If you select Scan Date, the date the scanning occurs is used for the Action Date. If you select User Date, a text box appears for you to manually enter the **Action Date**.
Action Time	R	Choose Scan Time or User Time. If you select Scan Time, the time the scanning occurs is used for the **Action Time**. If you select User Time, a text box appears for you to manually enter the **Action Time**.
Copy Attendee's name to this Attribute's Description	O	If you select this option, you must then choose which action attribute you want added to the member's constituent record on the Action screen. For example, you may have an action attribute category called Card User or User's Name. The cardholder's name will be added to the Description line of the attribute. This information appears on the Action screen in *Constituent Management.*

*Type: (R)equired, (O)ptional, (D)isplay-only, (B)utton

Note: The Attribute Category is defined in *Configuration*.   For more information on Attributes, see the *Configuration* chapter of *The Raiser's Edge for Windows Administrator's Guide.* For more information on where the action attribute appears on the constituent record, see the chapter on Viewing Membership Scanning information in this manual.

Registrant Button

When you click the **Registrant** button from the Start Up Properties screen, the Edit Default Registrant screen appears. From the **Registrant** button, you can establish default information to minimize data entry and keep the information consistent among registrants. For example, a museum may have a grand opening dinner to display their new exhibit. Members may have registered for the event, but they pay at the door. You can set defaults for fields such as **Amount**, **Amount Paid**, **Date Paid**, etc. and then manually add additional information to the **Registrant** button once the member's card is scanned.

Note: When establishing defaults for the **Registrant** button from the Start Up Properties screen, the **Registrant Name**, **Sponsored by**, and **Sort Key** fields are disabled.

The Registrant screen in *Membership Scanning* differs slightly from the Registrant screen in *Special Events*. Unlike the Registrant screen in *Special Events*, the screen accessed through *Membership Scanning* allows you to add such fields as **Campaign** and **Appeal** to the gift linked to the event through the **Gift** button. When you select **Edit, Start Up Properties** and click the **Registrant** button, the Edit Default Registrant screen appears.

Fields that function differently from the standard Registrant screen are described below.

Field Name	Type*	Description
Link to Gift	O	When you mark this checkbox, you must fill in the **Date Paid**. The **Gift** button then becomes active, allowing you to enter default gift information.
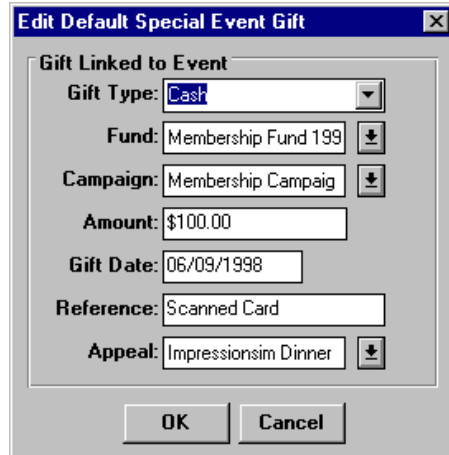
*Type: (R)equired, (O)ptional, (D)isplay-only, (B)utton

Note: For more information on the fields found on the Registrant screen, see the *Special Events* manual.

Note: If a member is not registered for an event, you must manually enter the registrant and/or sponsorship information. You can mark the option **Warn if Registration is not Complete** under Start Up Properties, but manual input is required either through *Membership Scanning* or *Special Events*.

Gift Button

The **Gift** button on the Registrant screen allows you to enter gift information and link the gift to a special event. This button is disabled until you mark the **Link to Gift** checkbox. When you click **Gift** the following screen appears.

Note: If you create a gift in *Special Events*, the **Amount Paid** field copies to the **Amount** field, the **Date Paid** copies to the **Gift Date** field, and the **Donation** copies to the **Receipt Amount** field. The program also copies the campaign and fund for the event to the gift. You may edit these default values.

Field Name	Type*	Description
Gift Type	R	In this field enter the type of gift donated for the registration. The standard gift types are available (i.e., Cash, Pledge, Stock, Gift-in-Kind, and Other).
Fund	R	A fund designates the specific financial purpose of the gift and is required. Examples may include Annual Fund or Library Expansion Fund. You establish funds in *Campaigns, Funds & Appeals*.
Campaign	O	A campaign represents the overall objective for raising funds. Examples may include the Capital Campaign or the Annual Giving Campaign. Campaigns are established in *Campaigns, Funds & Appeals*.
Amount	O	Use this field to enter the amount of the gift donated.
Gift Date	R	This date appears in reports and mailings and should be consistent. Therefore, your organization should decide which date to use for the **Gift Date** (i.e., whether to use the check date, the date the gift is entered, etc.).
Reference	O	This is a free-form text entry field. This space can also be used to enter information about stock gifts, such as 40 shares of XYZ Computer Company.
Appeal	O	An appeal defines the solicitation method that prompted the donor to give. Examples may include a Christmas Card Mailing, Sprint Phonathon, Annual Fall Mailing, Fall Kick Off Banquet, etc. Appeals are established in *Campaigns, Funds & Appeals* and are used to track cost effectiveness.

*Type: (R)equired, (O)ptional, (D)isplay-only, (B)utton

C H A P T E R   5

Using Membership Scanning

In This Chapter

- Overview
- Membership Scanning Screen
- Scan Membership Cards
- Search Screen
- Add a New Membership
- Renew a Membership
- Rejoin a Dropped Membership
- Action Screen
- Registrant Screen
- Address Screen
- View Scanned Cards
- Create Static Query of Records Scanned
- Clear Scan ID's
- Clear Totals

Overview

In *Membership Scanning* you can retrieve membership records by either scanning the bar code or using the search screen. Once you retrieve the record, you have the option to add a new membership, renew a membership, or rejoin a membership. Because members have friends and family who use their membership cards, *Membership Scanning* also gives you the option to view and edit the names on the current membership card list and their relationships to the member. For example, the Smith family may be members of a museum, and Mr. Smith may have had membership cards printed for their two children. When the children attend the museum, their cards are scanned and Mr. Smith's record retrieved. In addition to being able to view and edit the membership card list, you can add an action to Mr. Smith's record, indicating his children attended the museum on a particular date. Use the **Address** button to verify addresses or update members' addresses.

If you purchased *Special Events*, you can link the membership to a special event when a constituent registers for the event. *Membership Scanning* updates the attendance and warns you of incomplete constituent registrations.

Once you finish a scanning session, you can view the cards scanned for that particular session, as well as create a static query of the records scanned. From the **Edit, Clear Totals** option you can clear the totals for the scanning session and begin a new one.

Membership Scanning Screen

When you open *Membership Scanning*, the Set Up Properties screen appears. Once you set up your properties and click **OK,** the Membership Scanning screen appears, and you can begin scanning membership cards.

Note: For more information on the Set Up Properties screen, see the section on the Set Up Properties screen in the Membership Scanning: An Overview chapter in this manual.

Note: The **Registrant** button appears only if you have *Special Events.*

Field Name	Type*	Description
Scan ID	O	This 15-digit field displays the ID number of the scanned bar code. Your must place your cursor in this field before scanning. If the scan is unsuccessful, an Invalid Bar Code message appears.
Search	B	In the event a member does not have their membership card available for scanning, or the constituent is not a member, you can use the **Search** button to locate a constituent in the database. When **Search** is clicked, a search screen appears similar to the standard search screen used throughout *The Raiser's Edge*.
Membership Information frame	D	The **Name on Card** (or card recipient) displays at the top of the Membership Information frame, followed by the **Membership Status** beside the **Membership ID**, and the **Key Name** of the member. These fields may be bold, italicized, and/or blinking, depending on the preferences set in Start Up Properties.

*Type: (R)equired, (O)ptional, (D)isplay-only, (B)utton

Field Name	Type*	Description
Renew	B	When clicked, the standard Renew a Membership screen appears. This button is disabled for dropped memberships.
Rejoin	B	When clicked, the Rejoin a Membership screen appears, allowing you to rejoin a dropped constituent.
New	B	When clicked, the Add a New Membership screen appears, allowing you to add a new membership.
Mem Cards	B	When clicked, the Membership Card List screen appears, allowing you to edit information on the Membership Card List grid. From this screen you can add, edit, or delete constituents who should have a membership card printed. Additionally, you can indicate the relationship of the cardholder, the number of cards to be printed, and indicate if you want the address printed on the card.

Type: (R)equired, (O)ptional, (D)isplay-only, (B)utton

Note: For more information on adding a **Renew**, **Rejoin**, or **New** membership, refer to the chapter on Membership Tracking in this manual.

Field Name	Type*	Description
Registrant	B	This button accesses the Registration screen, allowing you to edit the registration for a linked event or add a new registration. The screen displayed here is very similar to the Registrant screen displayed in Start Up Properties and is only available if you have purchased *Special Events*.
Action	B	This button accesses the Action screen, allowing you to either view the action already added if defaults were established or add an action. If adding an action, the defaults from the Start Up Properties apply. You may change any of the fields here; these changes do not affect the default settings established in Start Up Properties. The action is added to the constituent record.
Address	B	This button accesses the list of available addresses, allowing you to update/view any addresses associated with the member. **Alternate**, **Primary**, **Business,** and **Spouse Business** addresses can be viewed. You can add or delete only **Alternate** addresses. **Alternate** and **Primary** addresses may be edited from here.

*Type: (R)equired, (O)ptional, (D)isplay-only, (B)utton

Note: Fore more information on the Address screen, see the section on the Address screen in this chapter.

Scan Membership Cards

Each time you enter the *Membership Scanning* module, the program asks if you want to clear the totals and begin a new session. These scanning sessions contain the constituents whose cards have been scanned. You can decide at the end of your session to view a list of the cards scanned, as well as create a static query of the constituents whose cards were scanned.

➢ **To scan a membership card:**

1. From the Membership Scanning screen, place your cursor in the **Scan ID** field.

2. Use your bar code scanner to scan the membership bar code. You can also manually type in the bar code numbers found on the membership card.

3. Once the program retrieves the record, the member's name appears under the Membership Information section. The name may appear in italic, bold, or blinking, depending on the preferences established in Set Up Properties.

4. Use the buttons provided to make any changes to the membership.
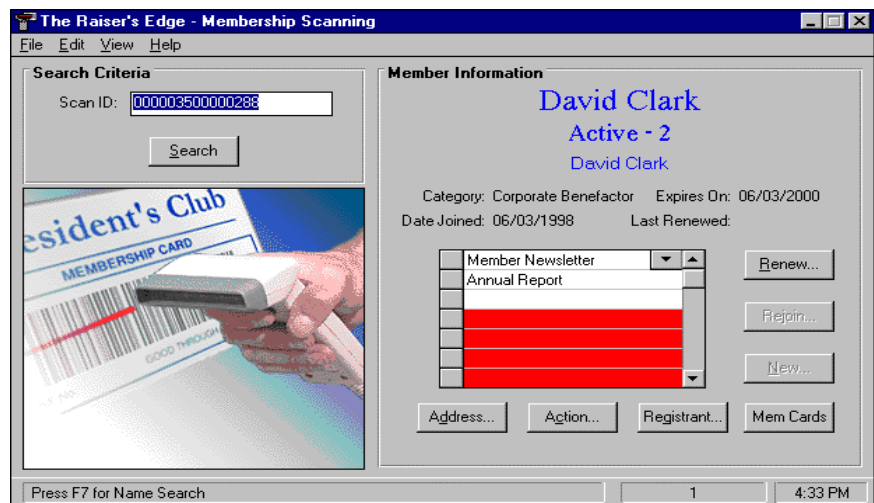
Note: To scan the next membership card, simply place the cursor in the **Scan ID** field. You do not need to use **File**, **Clear Scan ID** unless you want to undo any changes made to the database. This option is disabled once you click any of the buttons on the Membership Scanning screen.

Search Screen

In addition to scanning the information, you can use the **Search** button in *Membership Scanning* to retrieve the membership record. When you click **Search** the search screen appears. The field **Membership ID** is not the internal ID generated on the bar code, but the one specified on the original membership record.

The search screen functions differently from the program's standard search screen in that the results grid cannot be changed through settings in the *Configuration* module. Additionally, a search by **Membership ID** shows all card holders associated with that membership. For example, if David Clark has one membership with three **Name on Card** entries, each name appears under the search results grid.

Note: The biographical search is for the **Member,** not the **Name on Card.** The search does list all card recipients for each membership. If one of the recipients is also a constituent, the constituent's address information displays on the search screen. For example, if Melissa Clark is a cardholder on David Clark's membership and also a constituent, no membership information displays when you search for her, just her address information.

Add a New Membership

The **New** button enables you to establish a new membership for a constituent. The program activates the button only if the record retrieved does not have a membership. A new membership should only be added when a constituent is beginning their first membership within a category. If a constituent has had a membership in this category and has been dropped, you should rejoin the membership instead of adding a new one.

➤ **To add a new membership:**

1. From the Membership Scanning screen, once you have scanned the bar code the constituent's name appears in the Membership Information screen with the message **No Membership**.

Note: You can only add a membership for a constituent who does not have a current membership. The **New** button is disabled if the constituent has an existing membership.

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2. Click **New** on the Membership Scanning screen, and the Add a New Membership screen appears

3. Enter the appropriate membership information.

4. Click **OK**.

Note: For more information on the Add a New Membership screen, see the section on Adding a New Membership in this manual.

Renew a Membership

Renewing a constituent's membership keeps his membership active. Use this only if the constituent lapsed their membership. The constituent can also upgrade their membership by renewing it into a higher category. For example, a constituent may upgrade from the Sustainer category to the Lifetime category. They can also downgrade into a lower category or renew the membership into the same category.

➢ **To renew a membership:**

1. From the Membership Scanning screen, use your scanner to scan the membership code. The Current Member Information frame displays the membership's status.

2. Click **Renew** on the Membership Scanning screen, and the Renew a Membership screen appears.

3. Enter the information just as you would when adding a membership.

4. Click **OK**.

Note: For more information on the Renew a Membership screen, see the section on Renewing a Membership in this manual.

Rejoin a Dropped Membership

Rejoin a dropped membership when a constituent was dropped as a member and now wants to rejoin. A rejoin transaction is required to move a member from the dropped status to active.

Note: The **Rejoin** button is enabled only if the membership has the status of dropped.

➢ **To rejoin a dropped membership:**

1. From the Current Membership Scanning screen, use your scanner to scan the barcode. The Member Information frame indicates if the membership is dropped.

2. Click **Rejoin** from the Membership Scanning screen, and the Rejoin a Membership screen appears.

3. Enter the information just as you would when adding a membership.

4. Click **OK**.

Note: For more information on the Rejoin a Membership screen, see the section on Rejoining a Dropped Membership in this manual.

Action Screen

An action allows you track how often constituents use their membership cards and attend events. You can add an action automatically through preferences and defaults established in Set Up Properties or manually from the Membership Scanning screen. The Action screen displayed by clicking **Action** from the main Membership Scanning screen is very similar to the Action screen seen from the Start Up Properties screen. Once you scan the membership card, the program adds the action to the database. The action then appears on the Action tab of the member's record in *Constituent Management*.

Note: For more information on establishing preferences and defaults, see the section on establishing Start Up Properties in the Preparing for Membership Scanning chapter in this manual.

Adding an Action

➢   **To add an action:**

1. From the Membership Scanning screen, use your scanner to scan the barcode.

2. Click **Action** from the Membership Scanning screen. The Add an Action screen appears.

3. Enter the Action information.

4. Click **OK**.

Note: For more information on the fields found on the Action screen, see the section on the **Action** button in the Preparing for Membership Scanning chapter of this manual or see the section on the Action tab in the *Constituent Management* chapter of *The Raiser's Edge for Windows User's Guide.*

Registrant Screen

The Registrant screen in *Membership Scanning* is similar to the Registrant tab found in *Special Events*. However, unlike the Registrant tab in *Special Events*, the Registrant screen accessed through *Membership Scanning* allows you to add such fields as **Campaigns** and **Appeals** to the gift linked to the event through the **Gift** button. When you click **Registrant** from the Membership Scanning screen, the Edit Registration screen appears.

Note: The **Registrant** button is enabled only if you have selected the option **Link to Event** under Start Up Properties.

Registering a Constituent for an Event

➢ **To register a constituent for an event:**

1. From the Membership Scanning screen, use your scanner to scan the barcode.

Note: If the constituent is not registered for the event and you have marked the option **Warn if Registration is not Complete**, a warning appears asking you if you would like to register the constituent now. Clicking **Yes** brings you to the Registration screen.

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2. From the Membership Scanning screen, click **Registrant**. The Edit a Registration screen appears.

3. Enter the registration information for the constituent.

4. Use the **Gift** button to link the registration to a gift.

5. Click **OK**.

Note: For more information on the fields on the Edit a Registrant screen, see the section on the **Registrant** button in the Preparing for Membership Scanning chapter of this manual, or refer to the section on the Registrant tab in the *Special Events* manual.

Address Screen

The **Address** button allows you to update and view addresses associated with the membership. For example, David Clark has a membership, and his brother Sam, also a constituent, is listed in the **Name on Card** column of David's membership. When Sam's card is scanned, David's addresses appears when you click the **Address** button.

The first four columns list basic address information. The Address column is the address type taken from the constituent record (i.e., Spouse Business, Primary). The **Type** column displays the address type as specified on the record, such as Summer Home Address.

Note: Only Alternate addresses can be added and deleted; however, Alternate as well as Primary addresses can be edited. For the addresses that cannot be edited (i.e., **Business**, **Spouse Business**), the **Edit** button changes to **View**.

Edit/View Address Information

➢ **To edit/view address information:**

1. Click **Address** from the Membership Scanning screen. The Address List screen appears.

Address Block	City	State	ZIP	Address	Type
125 Broad Street	Charleston	SC	29401	Primary	
2124 Malvern Road	Charleston	SC	29401	Business	
24 Thomas Street	Charleston	SC	29401	Spouse Business	
105 Ripple View Drive	Highlands	NC	28741	Alternate	

Address List for David Clark

Buttons: **Add**   **Edit**   Delete   **OK**

2. Click **Add** to add alternate addresses. Only Alternate addresses can be added from this screen.

3. Click **Edit** to change existing address information. Only Primary and Alternate addresses can be edited.

Note: For addresses that cannot be edited (i.e., Business, Spouse Business), the **Edit** button changes to **View**.

4. Click **Delete** to delete an address. Only Alternate addresses can be deleted.

5. Click **OK**.

Note: Changes are saved to the constituent record once you click **OK**. Security rights established in *Configuration* for address additions, edits, etc., carry over into *Membership Scanning*. Therefore, if you do not have rights to delete an address in *Constituent Management*, you cannot delete an address in *Membership Scanning*.

View Scanned Cards

The **View Scanned Cards** option allows you to see the cards scanned during a session.   Use this option to view the list of members' names to ensure the names are correct, as well as to verify the dates and times they were scanned. You can view the **Constituent Name**, **Constituent ID**, **Name on Card**, **Scan Date,** and **Scan Time**. Additionally, you can choose to print the information listed on the View Scanned Cards screen.

➢   **To view scanned cards:**

1.   After scanning membership cards, select **File**, **View Scanned Cards** from the menu bar. The View Scanned Cards screen appears.

Constituent Name	Constituent Id	Name On Card	Scan Date	Scan Time
David Clark	43687273	David Clark	08/17/1998	1:48 PM
PV Construction	43687275	PV Construction	08/17/1998	1:49 PM
Michael J. Simpson	4509-MS	Mr. and Mrs. Simpson	08/17/1998	1:49 PM
Rebecca B. Aaron	1219-RA	Robert J. Reynolds	08/17/1998	1:50 PM
David Clark	43687273	Melissa Clark	08/17/1998	1:50 PM
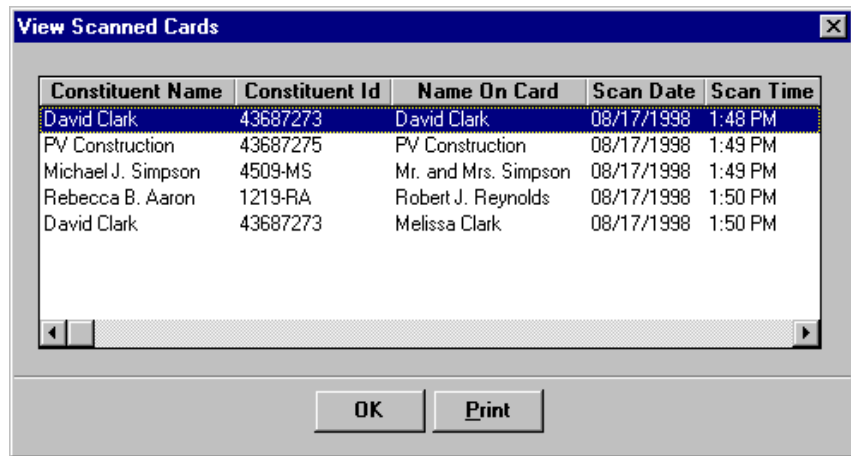
[OK]   [Print]

2.   Click **Print** to print a list of the **Constituent Names**, **Constituent Ids**, **Names on Cards**, **Scan Dates**, and **Scan Times**.

3.   Click **OK** to close screen.

Note: As with most screens in *The Raiser's Edge* that list information in columns, you can adjust these columns, making them longer or shorter, by placing your cursor in the gray column area and moving your mouse to the left or right.

Create Static Query of Records Scanned

Use the **Create Static Query** option to get a grouping of the members whose cards were scanned in the current scanning session. We recommend creating the static query in the event you need those records for mailings, reports, etc. You can use the static query in other modules such as *Reports*, *RE:Export*, *RE:Mail*, etc. For example, you can run a report based on this static query; you can globally add the constituents in the query to *RE:Batch* for gift entry; or you can send mail to these members for solicitations or thank you letters. The query created is a Constituent query, as opposed to a Gift query or Individual query.

➢ **To create a static query:**

1. Select **File**, **Create Static Query** from the menu bar. The Save Query screen appears.

Save Query	☒
Query Name: Membership Scanning Session 06/16/1998	**OK**
Description: Members whose cards were scanned for the Impressionism Exhibit Dinner.	**Cancel**
☒ Other Users May Execute this query	

2. Enter a **Query Name** and **Description**.

Note: We recommend entering information in the **Description** field so you can easily identify the query in other modules. For example, you may enter the name of the event the members attended, the name of the exhibit, or the name of a speaker.

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3. Determine if **Other Users May Execute this query**.

4. Click **OK**.

Note: If you select **Edit, Clear Totals,** the program asks if you want to create a static query of the records scanned before clearing the totals. Clicking **Yes** allows you to name the query. Clicking **No** exits the screen and clears the totals for the session without creating a query.

Clear Scan ID

The **Clear Scan ID** option allows you to clear the screen and undo any changes made to the database (i.e., remove actions, gifts, registrants, statuses, update totals, etc.). This option is disabled if you selected **Save** from the **File** menu or if you clicked the **Address**, **Action**, **Registrant**, **Renew**, **Rejoin**, or **New** buttons. To clear a Scan ID, select **File**, **Clear Scan ID** from the menu bar.

Clear Scan Totals

The **Clear Scan Totals** option allows you to reset the count of cards scanned (running or distinct) to zero. The program gives you the option to create a static query of the records scanned. You may want to first view the list of scanned membership cards by selecting **File**, **View Scanned Cards** from the menu bar. You should only clear scan totals at the end of a scanning session.

➢ **To clear scan totals:**

1. From the Membership Scanning screen, select **Edit**, **Clear Totals** from the menu bar. A warning message appears asking if you are sure you want to clear the totals.
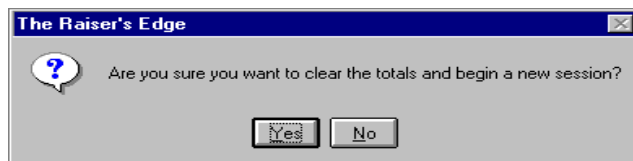
2. Click **Yes.** A message appears asking if you would like to create a static query.
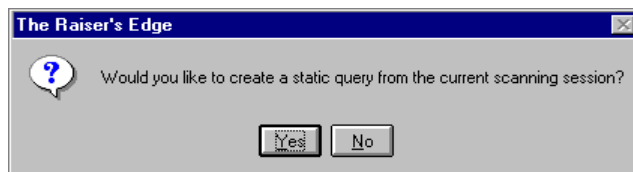
3. Click **Yes** to create a static query, and the Save Query screen appears, allowing you to name the query and add a description of the records saved.

Note: We recommend creating the static query. You can then use the query in other modules such as *Reports*, *RE:Export*, *RE:Mail*, etc. For example, you can run a report based on this static query; you can globally add the information into *RE:Batch* for gift entry; or you can send mail to these members for solicitations or thank you letters.

C H A P T E R   6

Viewing Membership Scanning Information in Other Modules

In This Chapter

- Overview
- Constituent Management
- View Action
- View Event Information
- Special Events
- View Registration Information

Overview

Once you have scanned your membership cards in the *Membership Scanning* module, you can view the actions added to the members' records and the event information in *Constituent Management*. Additionally, you can view the registrant information from the Registrants tab in the *Special Events* module. Both of these options depend whether you chose to add an action to the members' constituent records and link the scanning session to a special event from the Start Up Properties screen.

Note: For more information on establishing preferences, see the section on Start Up Properties in the Preparing for Membership Scanning chapter of this manual.

Constituent Management

View/Edit Actions

Options included in *Membership Scanning* allow you to add actions to a member's constituent record. For example, a museum has constituents who are members of the museum. Each time a member attends the museum and has their card scanned, you can add the action to the constituent's record, indicating they attended the museum. In *Constituent Management*, you can view these actions.

➢ **To view actions added to members' records:**

1. Open *Constituent Management*.

2. Locate the constituent record. Select the Actions tab. A screen listing all the actions for that constituent appears.

The **Type**, **Status**, and **Assigned** fields filter the actions that appear in the list. If you want to view all actions, leave the filters blank.

3. Highlight the Action you want to view and click **Edit**. The Edit an Action
    screen appears.

    The **Action Date** and **Time** reflect the date and time the card was scanned
    unless a specific time and date for all of the actions was set up under Start up
    Properties.

    Attributes are optional and may contain the name of the card user if you
    specified to add an attribute in Start Up Properties and marked the option **Copy
    Attendee's name to this Attribute Description**.

Note: Fore more information on establishing preferences, see the section on Start
          Up Properties in the Preparing for Membership Scanning chapter of this
          manual.

View/Edit Event Information

If you purchased the optional *Special Events* module, you may link the scanning
session to a special event. For example, a museum may have an Annual Gala as a
special event and scan the members' cards when they attend. Once you have
scanned the membership cards, you can view a list of the events for which the
constituent has registered and/or attended through the Events tab in *Constituent
Management*.

Note: The registration and attendance information appears in *Special Events*. For
          more information on viewing the registration information, see the section on
          Viewing Registration Information in this chapter.

> ➢ **To view/edit event information:**

1. Open *Constituent Management.*

2. Locate the constituent record. Select the Events tab. A screen listing the events for which the member has registered or attended appears.

Note: You can only view event information from this tab. To edit event information you must go to *Special Events*. For more information, see the next section on Viewing Registrant Information in this chapter.

Special Events

View/Edit Registrant Information

You can use the Registrant tab in *Special Events* to edit and view the registration information for a particular event. This allows you to view detailed information about the event, as well as make any changes to the information.

> ➢ **To view/edit registration information:**

1. Open *Special Events.*

2. Locate the event you want to view or edit. Select the Registrant tab. A screen appears listing all the constituents who have registered for the event.

3. Use the **Add**, **Edit**, and **Delete** buttons to make any changes to the registration information.

4. Highlight the registrant's name and click the appropriate button. If you selected **Edit,** the Edit a Registrant screen appears. You can make changes to the information here if needed.

Note: For more information on the fields found on the Registrant screen, refer to the *Special Events* manual.

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