The Raiser's Edge™

Membership Scanning Guide

Contents

What Is In This Guide?

In the *Membership Scanning Guide*, you learn to scan barcodes to retrieve your membership information (when you have the optional module, *Membership Management*). You can also learn about the following.

How Do I Use These Guides?

The Raiser's Edge user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the *Raiser's Edge* documentation from several places.

User Guides. You can access PDF versions of the guides by selecting **Help**, **User Guides** from the shell menu bar or by clicking **Help** on the Raiser's Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select **Support**, **User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about *The Raiser's Edge* by accessing the help file in the program. Select **Help**, **The Raiser's Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter "Load Defaults". The help file searches for the complete phrase in quotes instead of individual words.

Introduction to
Membership Scanning

Note: Optional modules such as *Postal Discounts, Membership Management*, and *Alumni Tracking* enable you to customize *The Raiser's Edge* to meet the specific needs of your organization. When you purchase an optional module from Blackbaud, you are given a code. You must enter this code to "unlock" or activate the optional module. For more information, see the Program Basics chapter of the *Program Basics Guide*.

Membership Scanning is additional functionality when you use the optional module *Membership Management*. With *Membership Scanning*, you can scan barcodes to retrieve membership information from your ***Raiser's Edge*** database. This module is ideal if your organization distributes and uses membership cards for anything from entrance to your museum, zoo, or event, to discounts at your gift shop. When you scan a membership card, the member information immediately appears on the screen for you to review. In User Options, you can select the information you want to display on the Membership Scanning page once a card is scanned. For example, you may want to select **Membership type** and **Card valid to** as fields to display. You can also determine if the cardholder is the primary member on the membership.

Membership Scanning is versatile and the amount of work you can do is extensive. You can create and print the membership cards you scan, complete with barcodes. From the Membership Scanning page, you can change the membership status, such as Upgrade, Downgrade, or Renew. You can also add new members and constituents to your database. You can even add an action from the Membership Scanning page. For example, next month you will send out a mailing to tell certain members about a new exhibit which opens soon at your museum. You can add an action to include all members whose cards you scan for entrance to your museum this month. You can automatically add actions, have the program prompt you to add an action each time a card is scanned, or manually add an action on the Membership Scanning page. When you use the optional module *Event Management,* you can also add a member as a participant for an event from the Membership Scanning page.

To scan membership cards, you need a barcode scanner that reads 12 point 3 of 9 font, which is what the Membership Cards mail task in *Mail* produces. You can scan the membership card barcodes, or manually enter the numbers corresponding to the lines that make up the barcode in the **Member Scan ID** field on the Membership Scanning page.

Frequently Used Terms

To effectively use *Membership Scanning* for your organization's fundraising efforts, you should have a basic understanding of common membership scanning terms. If you find an unfamiliar term when reading this or any guide in ***The Raiser's Edge*** documentation, search the online glossary in the help file.

Barcode. A barcode is a series of lines representing numbers that define a particular membership card. Scanning a barcode automatically retrieves the membership information. For example, in *Mail* you can select to print a barcode on membership cards. When a member arrives at the zoo, you can scan the barcode on the card to retrieve the member's information. Membership information displays on your Membership Scanning page.

Cardholder. A cardholder is entitled to a membership card and, as a result, some of the membership benefits. However, a cardholder does not have to be a constituent, relationship, or appear anywhere in your database. For example, you may have a member who wants her baby-sitter to have a membership card. The baby-sitter can take the children to the zoo while the member is at work. The baby-sitter is only a cardholder, not a joint member or primary member.

Joint member. The joint member is related to the primary member and can receive the benefits of membership. A membership can have several joint members. For example, Mr. Diresta is a member at your museum. His wife and children are joint members on his membership. Joint members can be listed on reports and must be relationships on the Relationships tab of the primary member's constituent record. Joint members may or may not be cardholders.

Primary member. The primary member is the person who has a constituent record in the database and is the main contact for and holder of the benefits of the membership. Only one primary member per membership can exist.

Session. A session is the duration of the membership scanning activity. A scan session can last for an hour, a day, days, weeks, or months. Some organizations may start a new scan session each day and run reports each night, listing the membership cards scanned and the properties for that session. Others may run the same report on a weekly basis. *However, when a new session is started, the properties for the previous session are erased.*

Scanning Properties. Scanning properties are the characteristics of your last scan session. Session properties are stored per user. This means each user can view the properties associated with the last scan session, regardless of what workstation was used for scanning. Session properties include the number of cards scanned, and the date and time the session was first started. You can view session properties on the Scanning Details screen by selecting **View**, **Scanning Details** from the shell menu bar on the Membership Scanning page.

Navigating in Membership Scanning

Note: *Membership Scanning* is a front office tool. For example, many members have the potential to see your computer screen as you scan membership cards for entry. If you prefer to maximize the Membership Scanning page, from the shell menu bar, select **View**, **Raiser's Edge bar** to remove the bar on the far left.

From the Membership Scanning page, you can scan membership cards and add new members, actions, and event participants (when you use the optional module *Event Management*). To access the Membership Scanning page, click **Scanning** on the Raiser's Edge bar.
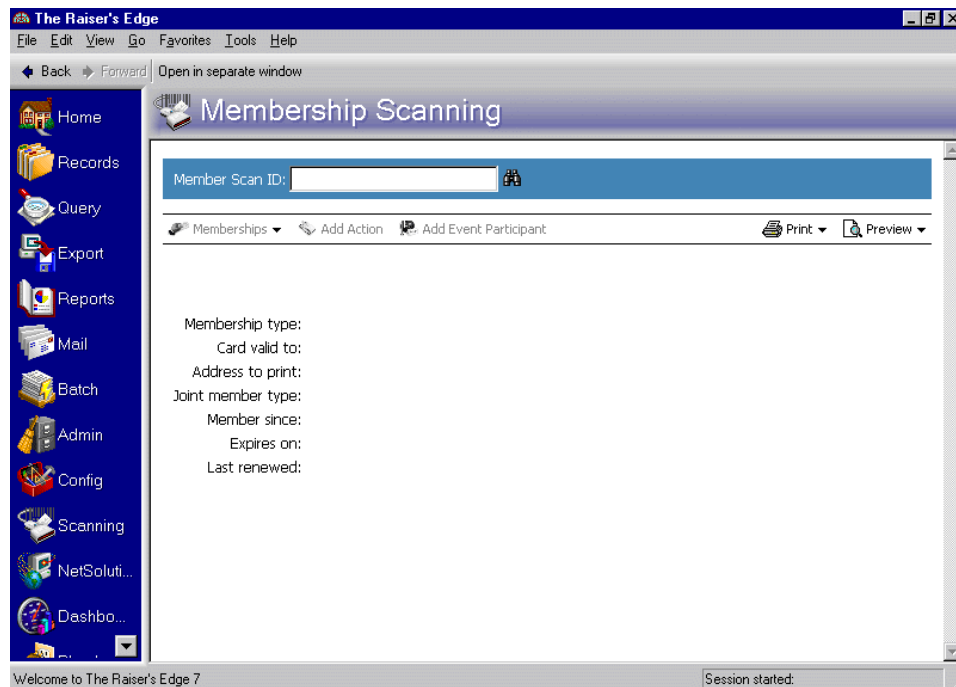
Membership Scanning Page

When you click **Scanning** on the Raiser's Edge bar, the Membership Scanning page appears. Once you scan a membership card, the member information appears on this page in the display fields.
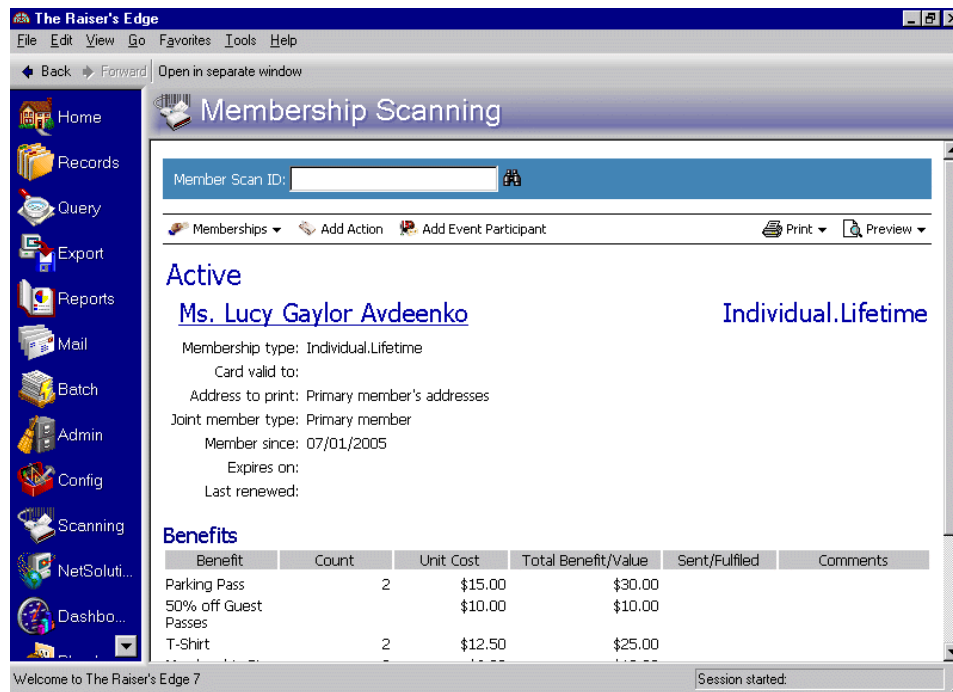
Once you scan a card, you can access the membership record and the constituent record associated with the membership; change membership status, such as renew a membership; view other memberships; print a membership card; add an action; and add the member as a participant of an event, (when you use the optional module *Event Management*).

For more information about opening a record or printing from the Membership Scanning page, see "Basic Processes of Membership Scanning" on page 39. For more information about changing membership status, viewing other memberships, or adding actions or participants from the Membership Scanning page, see "Advanced Processes of Membership Scanning" on page 59.

Member Scan ID Field

To use *Membership Scanning*, you must understand the search functionality of the **Member Scan ID** field. Three ways exist to search for a name on the Membership Scanning page: using binoculars to open a search screen, manually typing in the numerical membership barcode, and using your scanning device to scan in the membership barcode.

Search Using Binoculars

If you search for a member using the binoculars in the **Member Scan ID** field, it is important to remember this type of search is a primary and joint member search. This type of search does not include guest pass cardholders.
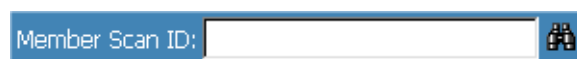
For example, Heath George is listed as a guest pass on Nicholas Vincent's membership record. Nicholas's wife, Jane, is listed as a joint member on his membership record. If you search using the binoculars, the search does not find Heath in the database and cannot display his information on the Membership Scanning page. However, because Jane is listed as a joint member, the search can successfully find her. Nicholas's membership information displays on the Membership Scanning page because he is the primary member.

> **Note**: Guest pass cardholders can be found when using the numeric membership barcode or the scanning barcode.

When you click the binoculars, the Open screen appears, so you can search the database. For more information about using the Open screen, see the Program Basics chapter of the *Program Basics Guide*.
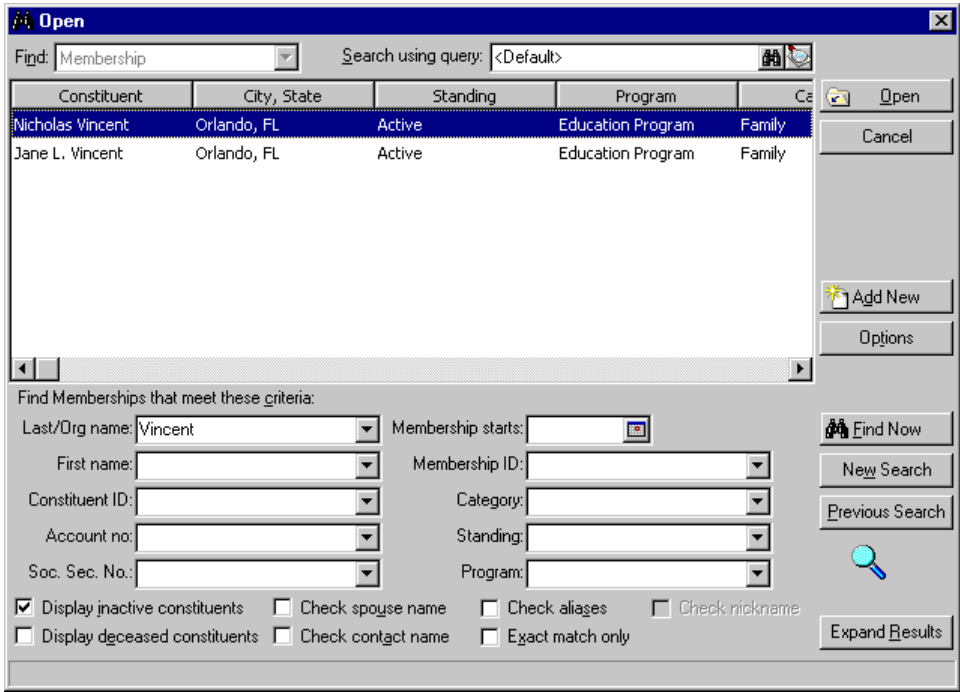
Numerical Membership Barcode

You can manually enter the fifteen digit numeric barcode into the **Member Scan ID** field and press ENTER on your keyboard to display member information on the Membership Scanning page. If your scanning device breaks, you should search for members this way.

This **Raiser's Edge** generated number represents a combination of information, enabling the program to successfully identify primary members, joint members, and cardholders.

Scanning Membership Barcode

The scanning barcode is the actual barcode on a membership card you scan to display primary member, joint member, or cardholder information on the Membership Scanning page.

When you scan the barcode, the numeric barcode displays in the **Member Scan ID** field. *You must place your cursor in this field before you scan a barcode.*

It is important to remember that your scanning device may automatically enter an additional space at the end of the scan barcode. *Any time you experience difficulty using your scan device, we recommend you manually enter the numeric barcode number.*

Membership Scanning Action Bar

You can perform several tasks on the action bar of the Membership Scanning page. Links on the action bar provide ways to open and edit the membership record, and add actions and event participants. In addition, the Membership Scanning page contains **Print** and **Preview** links on the action bar. By using these links, you can print or preview Membership Cards and the Scanning Details Report.

Membership Scanning Display Fields

You can customize the Membership Scanning page for your personal preference. You can change the color and font style of the member name, membership status, and membership type information. You can choose to view addresses, membership benefits, photographs of your members, and select specific sounds to alarm you if the member is Active, Lapsed, or Dropped. Several membership display fields default automatically, and you can add many more fields, such as **Consecutive years**, **Primary member**, or **Total renewals**.

In User Options, you select your personal preferences for *The Raiser's Edge*. User Options are login-specific, which means if you log into any workstation using your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. For more information about customizing your Membership Scanning page, see the "User Options" on page 13.

Options From The Raiser's Edge Shell Menu Bar

Three main options are available from the Raiser's Edge shell menu bar: **New Scanning Session**, **Cancel Scan** and **Scanning Details**. These options are only on available when you are on the Membership Scanning page.

New Scanning Session

> **Note**: Membership Scanning options are available from the shell menu bar when you are on the Membership Scanning page.

After tracking attendance per workstation, you may want to begin a new scan session on a daily, monthly, or weekly basis. For example, you scan your VIP cardholders on workstation A, and you scan your general admission cardholders on workstation B. After tracking attendance for the current week on the Scanning Details screen of both workstations, you decide to clear both sessions. On each workstation, select **File**, **New Scanning Session** from the Raiser's Edge shell menu bar. For more information about the Scanning Details screen, see "Scanning Details" on page 8.
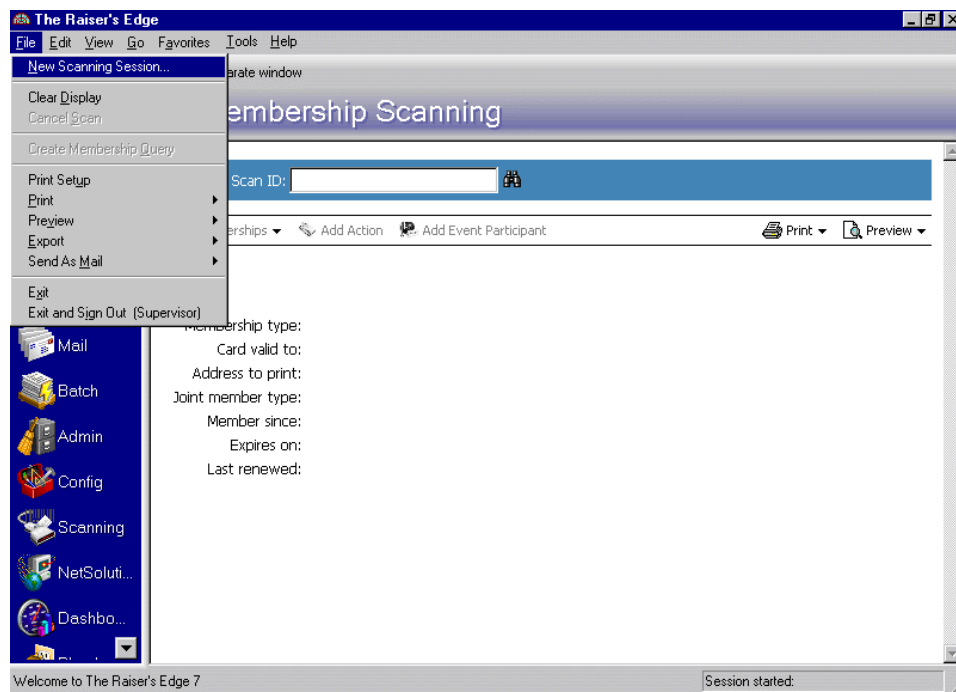
> **Note**: If you do not want to view this message again, mark the **Do not show this warning message again** checkbox.

A message appears, informing you the scanning details will be cleared.
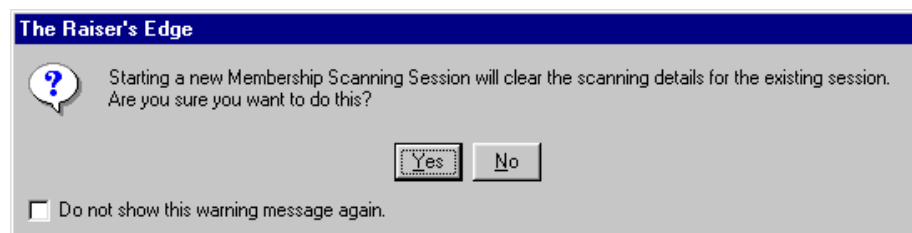
To begin the new scan session, click **Yes**.

Cancel Scan

Note: This example also applies if you automatically add action records.

When you cancel a membership card scan, certain changes made to the database clear. For example, Leslie McNally comes to your museum today and wants to sign up for the Walk-a-Thon. In User Options, you selected to automatically add participants and created a participant default set for the Walk-a-Thon event. To quickly add Leslie's participant record, you scan her membership card. Leslie immediately realizes she has a conflict with the date of the Walk-a-Thon and she cannot participate in this event. Because you automatically added a participant record for Leslie, you want to cancel the membership scan to remove the participant record. To do this, select **File**, **Cancel Scan** from the Raiser's Edge shell menu bar while Leslie's membership information still appears on the Membership Scanning page. For more information about automatically adding participant records, see "Membership Scanning Tab User Options" on page 17.
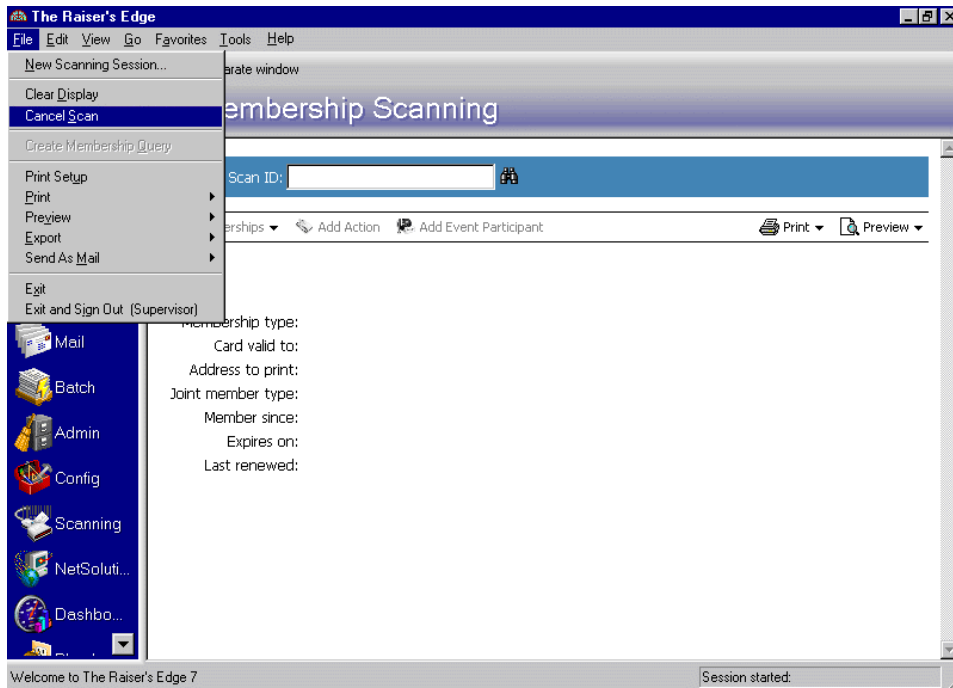
Any gifts added automatically as a result of the automatic participant record also clear from the database when you select **Cancel Scan**. In addition, the card is removed from the **Scanned Cards** grid on the Scanning Displays screen.

If you navigate away from the Membership Scanning page to Renew, Rejoin, Upgrade, or Downgrade a membership, information you change on the membership record does *not* clear when you select **Cancel Scan**. This also applies to manually adding participant records and action records and to printing membership cards.

If you open the membership record or the constituent record from the Membership Scanning page, **Cancel Scan** disables.

Scanning Details

**Note**: Membership Scanning options are available from the shell menu bar when you are on the Membership Scanning page.

When you select **View**, **Scanning Details** on the Raiser's Edge shell menu bar, the Scanning Details screen appears.
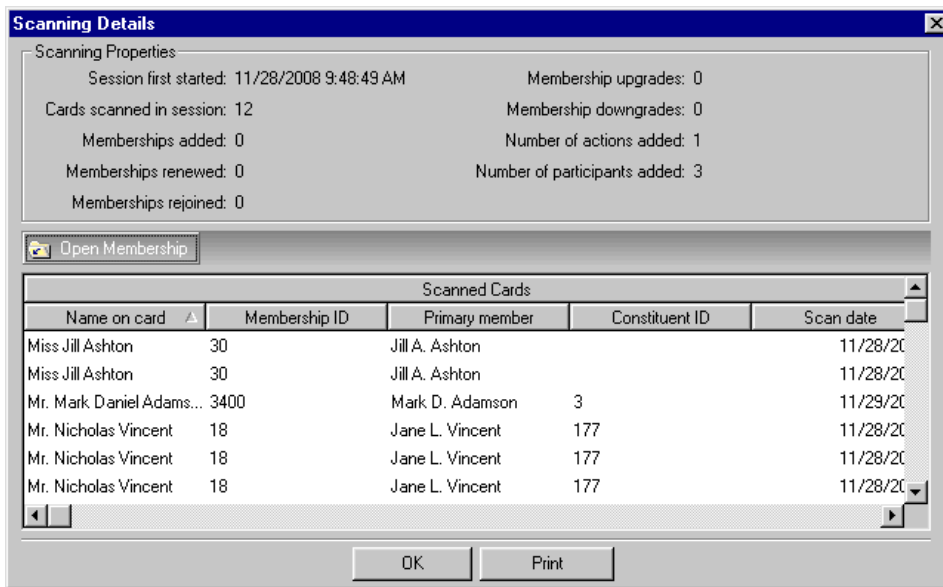
Warning: The information you view on the Scanning Details screen is specific to the your workstation. For example, if you scan in Mark Adamson and Anne Sinclair at Workstation A, you can view their information on Workstation A's Scanning Details screen. However, they do not show up on Workstation B's Scanning Details screen.

The Scanning Details screen provides summary information for the current scan session only. You cannot make changes to this screen. When a new scan session starts, the information on the Scanning Details screen is cleared. Before beginning a new scan session, you may want to export and print the Scanning Details screen by right-clicking on the screen. When the menu appears, select the option you need.

The **Scanning Properties** frame displays general statistics for a scan session. For example, you can view the time and date the scan session started and how many cards have been scanned during the session. In addition, the number of processes involved with the scanned cards, such as rejoins and upgrades or added actions and participants, and the total number of guests and children attending with your scanned-in members display in the **Scanning Properties** frame.
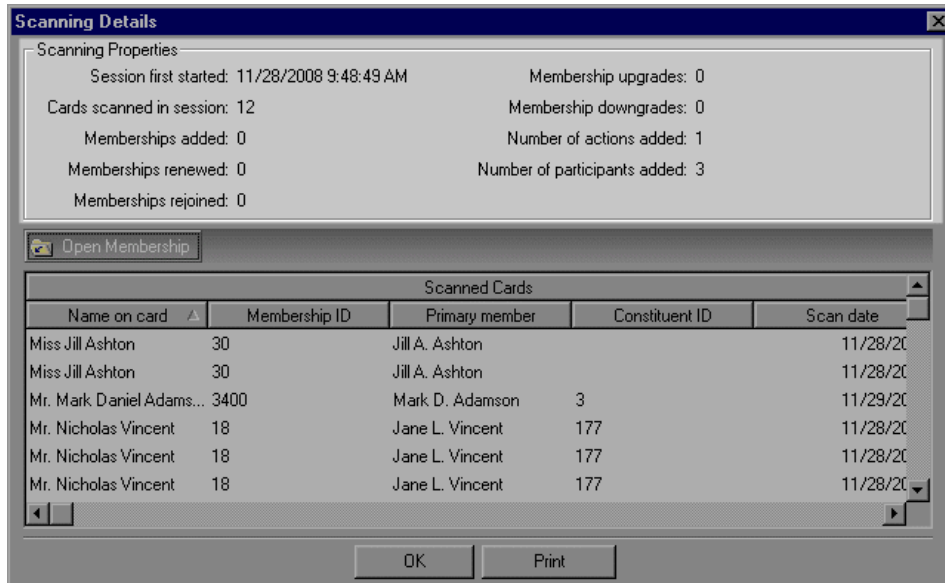
Note: You can widen the columns in the **Scanned Cards** grid by placing your cursor on the column dividing lines. When a line with two arrows appears, drag the column to the width you want. You cannot resize the entire grid; use the arrows at the bottom of the grid to scroll and view all information contained in the grid.

The **Scanned Cards** grid includes the **Name on card**, **Membership ID**, whether or not the cardholder is the **Primary member**, the **Constituent ID**, **Scan date**, and the **Scan time**. The grid on this screen lists information about the membership cards that have been scanned in the current scan session only.
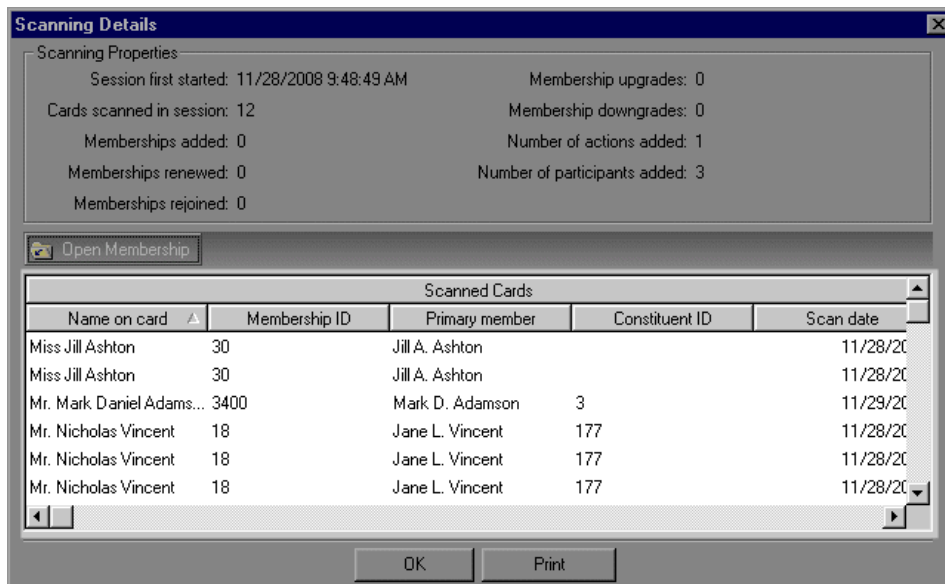
Tip: You can also open a membership record by double-clicking the row you highlight in the **Scanned Cards** grid.

To open a membership from the **Scanned Cards** grid, highlight the row for the membership you want to access and click **Open Membership** at the top of the grid.

You can search for information in the **Scanned Cards** grid by selecting **Find** from the right-click menu. The Find screen appears.


You can select to search the **Scanned Cards** grid by selecting a column heading in **Field** or entering all or part of the text you want to search for in the **Find what** field. In the **Match** field, select to match what you entered in the **Find what** field with the whole field, the start of the field, or any part of the field. For example, you can choose to search for primary member information that starts with Ashton. Select "Primary member" in **Field**, enter "Ashton" in the **Find what** field, and select "Any part of field" in the **Match** field. To begin searching, click **Find First**. The first matching row in the grid is highlighted. To find the next row that matches the entered search criteria, click **Find Next**. To end the search and return to the **Scanned Cards** grid, click **Close** on the Find screen.

If you want to save a copy of the **Scanned Cards** grid, you can export the grid from the right-click menu. When you right-click on the grid, select **Export Scanned Cards Grid** to export to a disk and **Export Scanned Cards Grid to Excel** to export to *Microsoft Excel*.
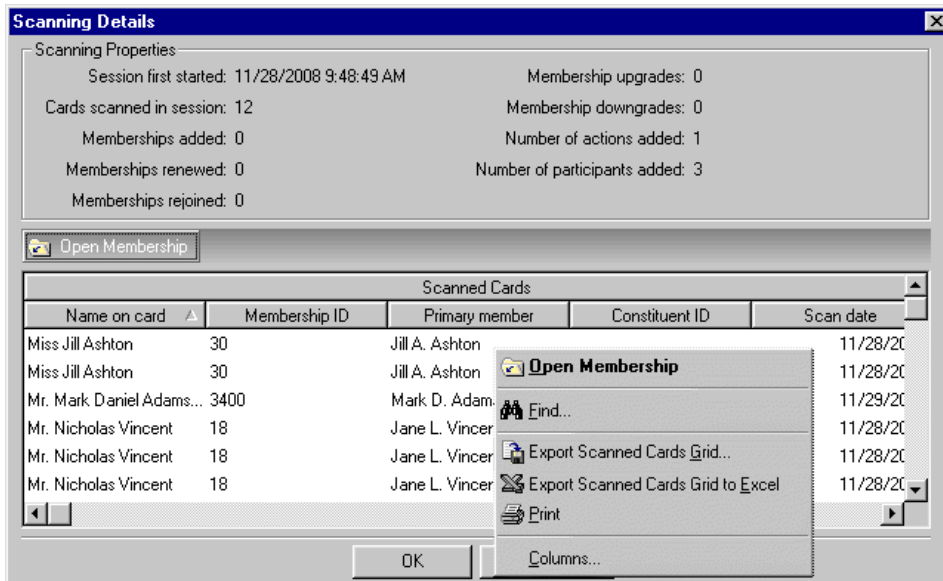
The information in the grid prints and exports exactly as it appears on the screen.

To add or hide columns that appear on the **Scanned Cards** grid, right-click on the grid and select **Columns** from the menu that appears. The Columns screen appears.
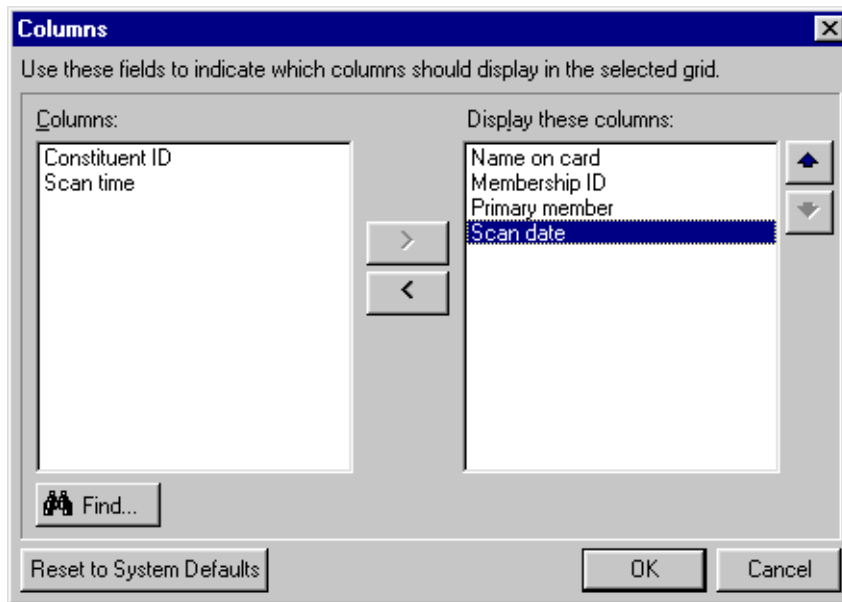
To remove a column from the **Scanned Cards** grid, highlight it in the **Display these columns** box and click the left arrow to move it to the **Columns** box. To add a column to the screen, use the right arrow to move it from the **Columns** box to the **Display these columns** box. Use the up and down arrows on the right to order the columns in the grid. To reset to the program's default column settings, click **Reset to System Defaults**. When you are finished, click **OK** to set your column selections and return to the Scanning Details screen.

> **Note**: To preview the Scanning Details screen before it prints, select, **File**, **Preview** from the Raiser's Edge shell menu bar. When the menu appears, select **Scanning Details Report**. You can also select **Preview** on the Membership Scanning action bar. When the menu appears, select **Scanning Details Report**.

From the Scanning Details screen, you can print the entire screen by clicking **Print**. The hard copy prints directly to your default printer. You can also print this information by clicking **Print** on the Membership Scanning action bar. When the menu appears, select **Scanning Details Report**. The report prints directly to your default printer.
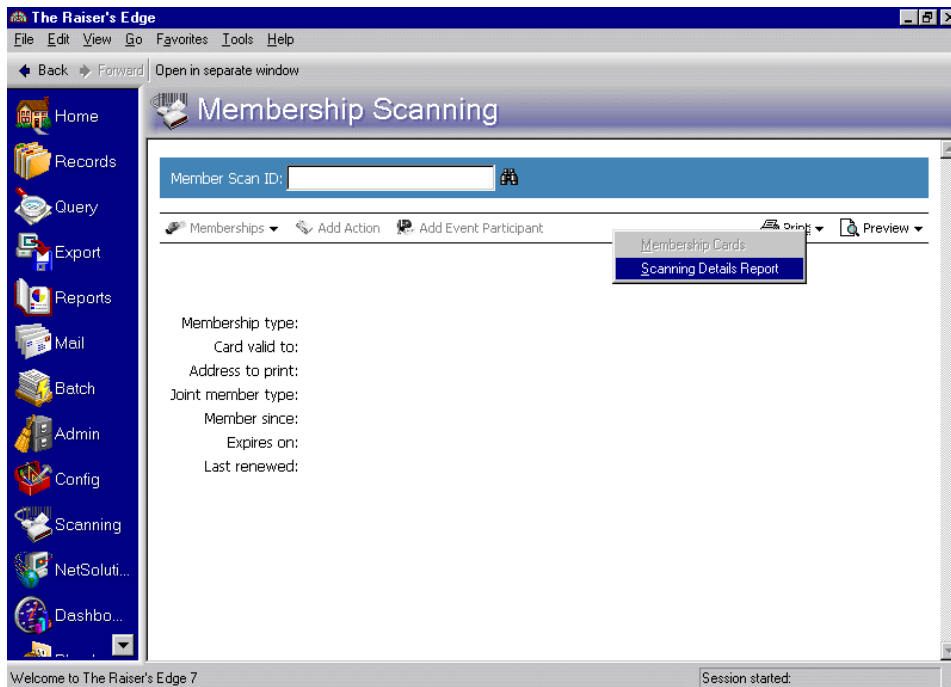
User Options

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on the workstation you are using. User options are login-specific, which means that if you log into any workstation using your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. You can establish user options by selecting **Tools**, **User Options** from the Raiser's Edge shell menu bar. The Options screen appears so you can establish certain user options for *Membership Scanning*.

Color Tab User Options

Once you scan a membership card, the name, membership status (such as Active or Lapsed), and membership type (such as Individual program, Lifetime category) appear at the top of the Membership Scanning page. You can change the color for membership information on the Color tab in User Options. Select colors that quickly draw attention to important membership information. For example, you can change the membership status of Dropped to red. This way, you can quickly identify members with a Dropped status when you scan the membership card.

▶   **Setting Color tab User Options**

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools**, **User Options**. The Options screen appears.

2. Select the Color tab.

3. From the list on the left, select **Legends**. The Legends User Option selections appear on the right.
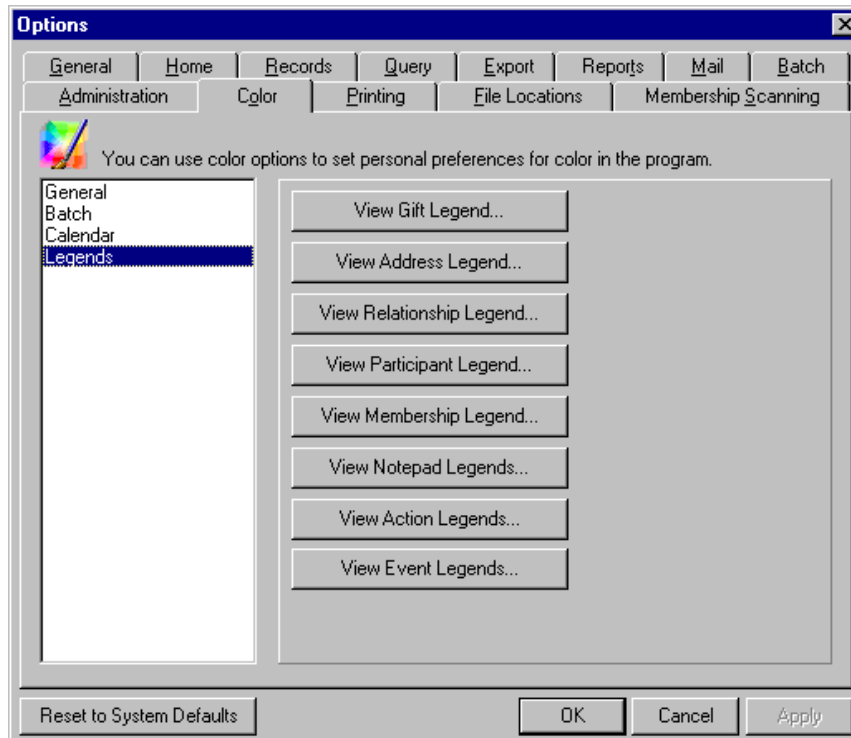
Warning: Changing the membership status color for *Membership Scanning* also changes the color for the membership status display on the Membership tab of the membership record. If you change the color for the Membership tab, the change applies to *Membership Scanning*, as well.

4. Click **View Membership Legend**. The Legend screen appears, so you can select your preferences.
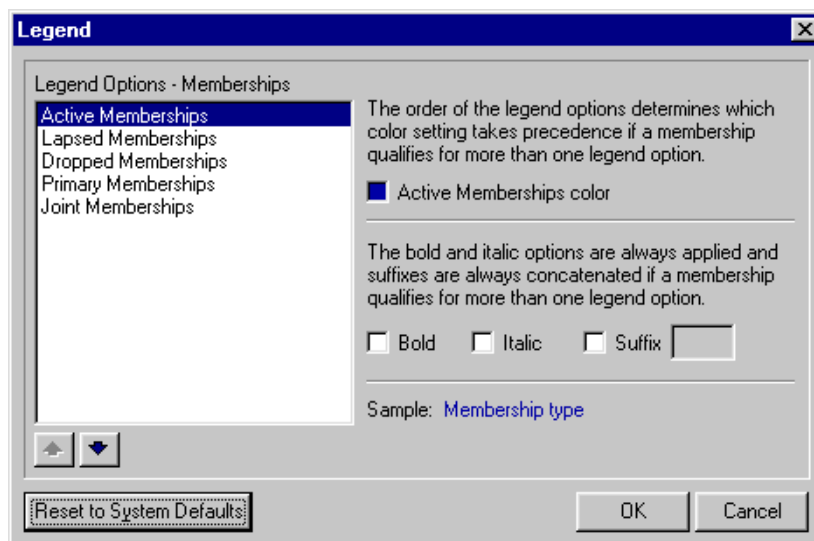
From the Legend screen, you can select a color to identify your membership options. You can also specify that they appear as bold or italic.

5. Once you make your selections, click **OK.** You return to the Color tab.
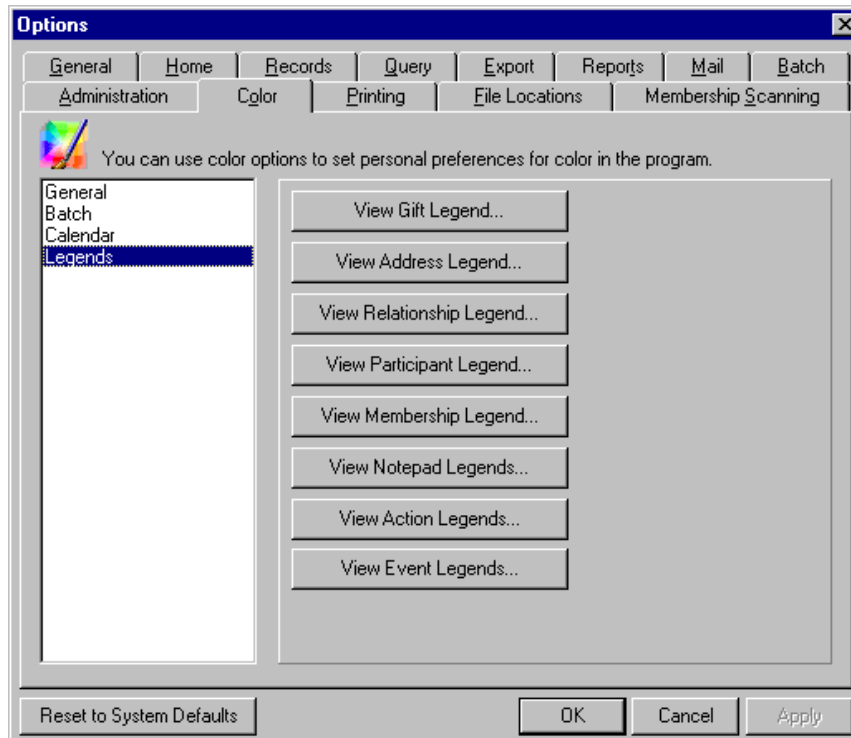
6. To apply and save your changes, click **Apply**. To save your changes and close the Options screen, click **OK**. For more information about the Color tab, see the User Options chapter of the *Program Basics Guide*.

Printing Tab User Options

On the Printing tab in User Options, you can define the parameter file to use when you print membership cards from *Membership Scanning*. Selecting parameter files on the Printing tab in User Options saves time by eliminating the steps of selecting the filters you want each time you print membership cards.

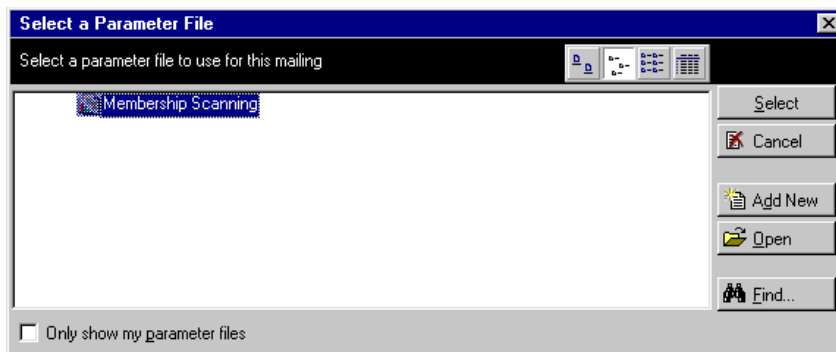‣ **Setting Printing tab User Options**

Note: A parameter file contains all the settings, or parameters, you select for a particular mail task. For example, if you print membership cards monthly, you can save the settings you select in the Membership Cards mail task as a parameter file. Later, you can open this parameter file and rerun the mail task or alter the settings as necessary to create new membership cards.

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools**, **User Options**. The Options screen appears.

2. Select the Printing tab.

3. From the list on the left, select **Membership Scanning**. A grid appears on the right with Membership Scanning printing options. Here, decide if you want the program to ask you to select a parameter file each time you print a membership card from the Membership Scanning page, or if you want to set up default parameters.

4. In the Membership Card row, in the **Option** column, select "Ask for parameter file". When you select this option, you are specifying that the program asks you to select a parameter file each time you print a membership card from *Membership Scanning*.
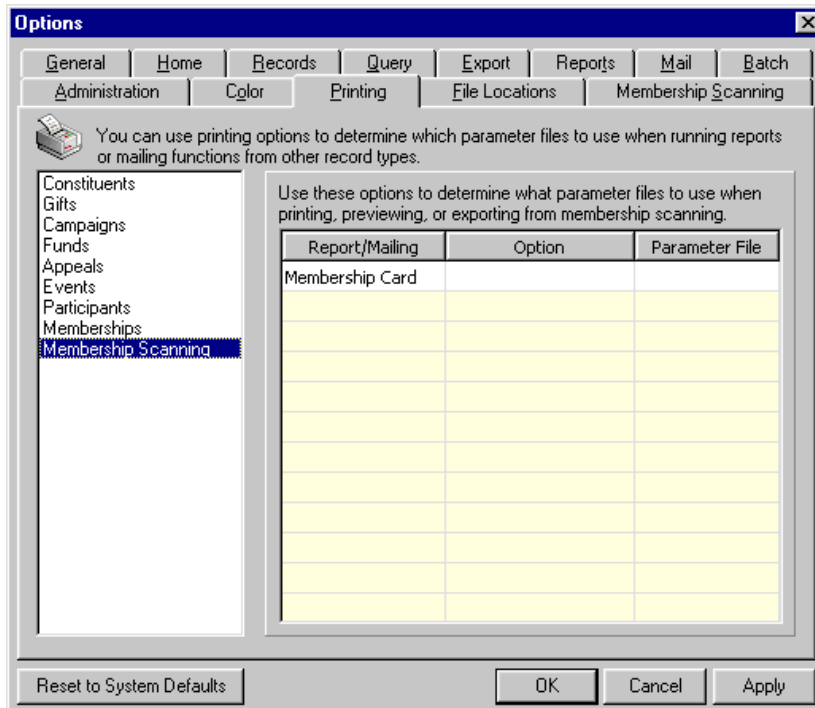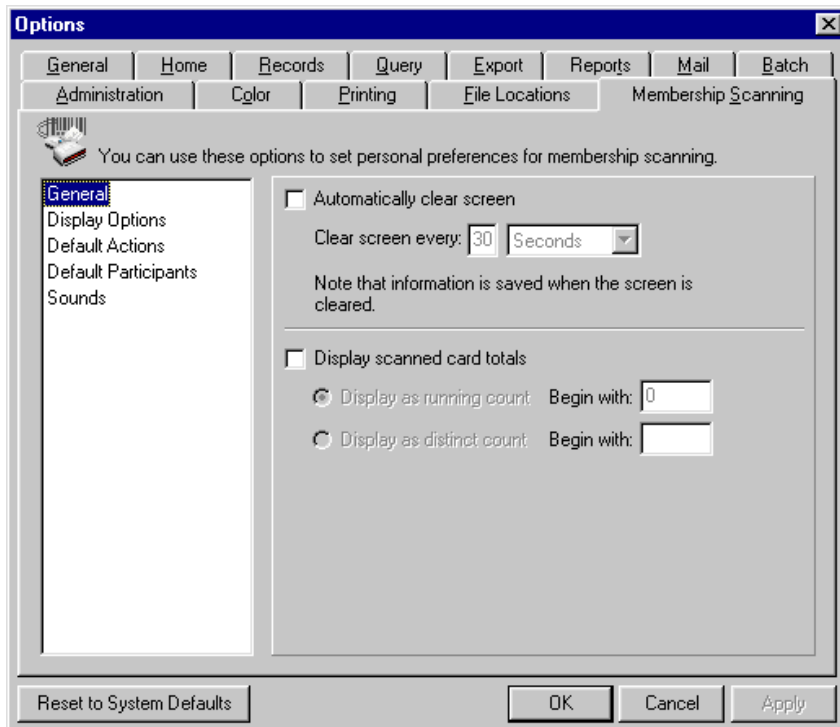

5. To establish a default parameter file for printing membership cards from the Membership Scanning page, select "Use this parameter file" in the **Option** column.

6. In the **Parameter File** column, click the binoculars to search for the previously saved parameter file to use. The Select a Parameter File screen appears.

Note: To create a new parameter file, click **Add New**.

7. Highlight the established parameter file you want to use and click **Select**. You return to the Printing tab on the Options screen. The **Parameter File** name appears in the column. For more information about establishing parameter files for membership cards, see the *Mail Guide*.

8. To apply and save your changes, click **Apply**. To save your changes and close the Options screen, click **OK**. For more information about the Color tab, see the User Options chapter of the *Program Basics Guide*.

Membership Scanning Tab User Options

Many options for *Membership Scanning* are available on the Membership Scanning tab so you can customize your needs and preferences. You can select to display a running count of scanned cards in the status bar, show benefit and address information, establish default actions and event participants (when you use the optional module *Event Management*), and play sounds when memberships with a status of Active, Lapsed, or Dropped are scanned.

▶ **Setting General Options for Membership Scanning**

By selecting options from the **General** list on the left, you can automatically clear the Membership Scanning page at certain time intervals and you can view a count of the number of membership cards you scan in the status bar on your screen.

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools**, **User Options**. The Options screen appears.

2. Select the Membership Scanning tab. The **General** options display automatically.

3. To clear the Membership Scanning page periodically, mark the **Automatically clear screen** checkbox and enter an amount of time in the **Clear screen every** fields. For example, you can select to clear the page every 30 seconds. The information is saved in the Scanning Details screen when the screen is cleared. For more information about this screen, see "Scanning Details" on page 8.

4. To view totals for a scan session in the status bar at the bottom of the Membership Scanning page, mark the **Display scanned card totals** checkbox. Select the **Display as running count** or **Display as distinct count** option, depending on how you would like to view the totals. For example, you scan Andrea Tidwell's membership card three times. If you select running count, Total scanned in the status bar is "3". If you select distinct count, Total scanned in the status bar is "1". Then, in the **Begin with** field for the option you choose, enter the number where you want counting to begin for the scan session.

5. To apply and save your changes, click **Apply**. To save your changes and close the Options screen, click **OK**. For more information about the Colour tab, see the User Options chapter of the *Program Basics Guide*.

▶ **Setting Display Options for Membership Scanning**

When you select **Display Options** from the list on the left, you can choose to view as much or as little membership information as you want on the Membership Scanning page. You can select to view every membership field available or you can select to view one membership field. You can also select to automatically display membership benefits, constituent addresses, and a member's photo ID.

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools**, **User Options**. The Options screen appears.

2. Select the Membership Scanning tab.

3. From the list on the left, select **Display Options**. The available selections appear on the right.
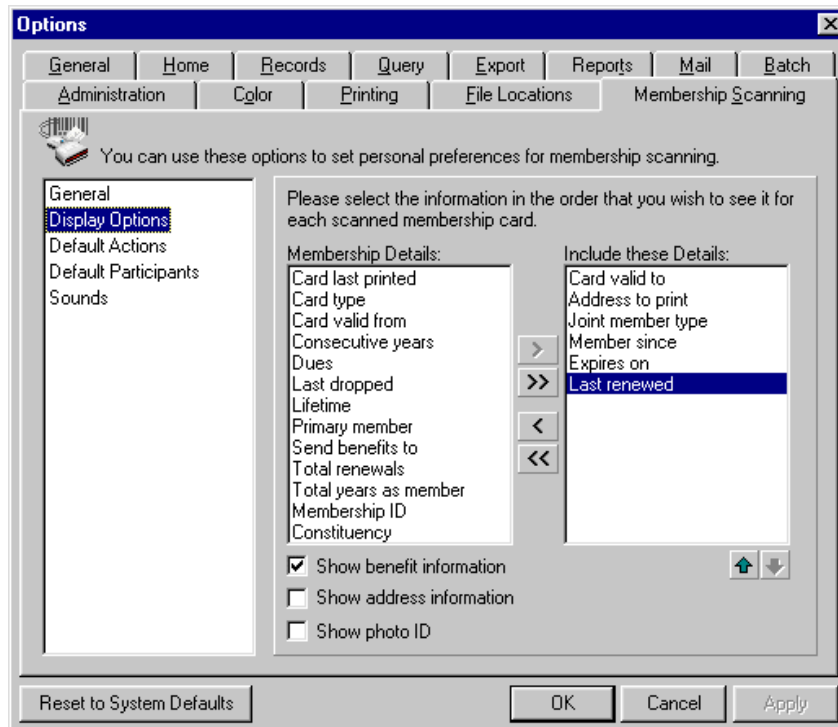
Note: You can use the optional module *VBA for Advanced Customization* to include additional ***Raiser's Edge*** fields (as well as fields from other programs). For more information, see the Using Customizations in Membership Scanning chapter of this guide.

4. In the **Membership Details** box, highlight the selections you want to appear on the screen during a scan session and click the single right arrow to move each of them to the **Include these Details** box. Certain selections default into the **Include these Details** box. To remove them, highlight each selection in the **Include these Details** box and click the single left arrow to move them back to the **Membership Details** box. Use the double right arrows to move every field to the **Include these Details** box and use the double left arrows to move every field to the **Membership Details** box. Use the up and down arrows below the **Include these Details** box to arrange the order information appears on the Scan screen. For more information about this screen, see "Membership Scanning Page" on page 4.

5. To view benefit information in a grid on the Membership Scanning page, mark the **Show benefit information** checkbox.

6. To view member address information in an **Addresses** grid on the Membership Scanning page, mark the **Show address information** checkbox. The address that displays on the Membership Scanning page is that of the cardholder. For example, Kyle Bell is a joint member on Susan Bell's membership record. If you search for Kyle, Susan's membership information displays on the Membership Scanning page, but Kyle's address information displays in the **Addresses** grid.

You can add a new address, open an address record to change address information, or delete an address directly from the Membership Scanning page. For more information about addresses on the Membership Scanning page, see "Correcting a Cardholder's Address from the Membership Scanning Page" on page 79.

7. To display the member's photo on the Membership Scanning page when you scan the card, mark the **Show photo ID** checkbox. If you do not have a member's photo in the **Photo ID** field on the member record, a generic picture file displays. For more information about adding photo IDs, see the *Membership Data Entry Guide*.

For the best results when using photo IDs on the Membership Scanning page, we recommend you save your images no larger than 300 x 300 pixels. You can display larger images, but viewing the display fields may become more difficult. Photo file types must be saved as a .bmp, .gif, .jpg or .jpeg file.

8. To apply and save your changes, click **Apply**. To save your changes and close the Options screen, click **OK**. For more information about the Color tab, see the User Options chapter of the *Program Basics Guide*.

▶ **Setting Default Actions for Membership Scanning**

Selecting **Default Actions** from the list on the left can save time and help maintain data entry consistency by automatically adding action records for your members. Before selecting your default action records, you should consider your organization's entrance procedures before scanning any membership cards. For example, if you plan to add an action for every membership card you scan to track attendance, automatically adding action records saves you time and ensures the same information is added to each action record. However, if an action does not apply to every membership card you scan, you do not want to automatically add action records. Action records can be added for members to which they do not apply; causing you to spend additional time correcting information in your database.

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools**, **User Options**. The Options screen appears.

2. Select the Membership Scanning tab.

3. From the list on the left, select **Default Actions**.
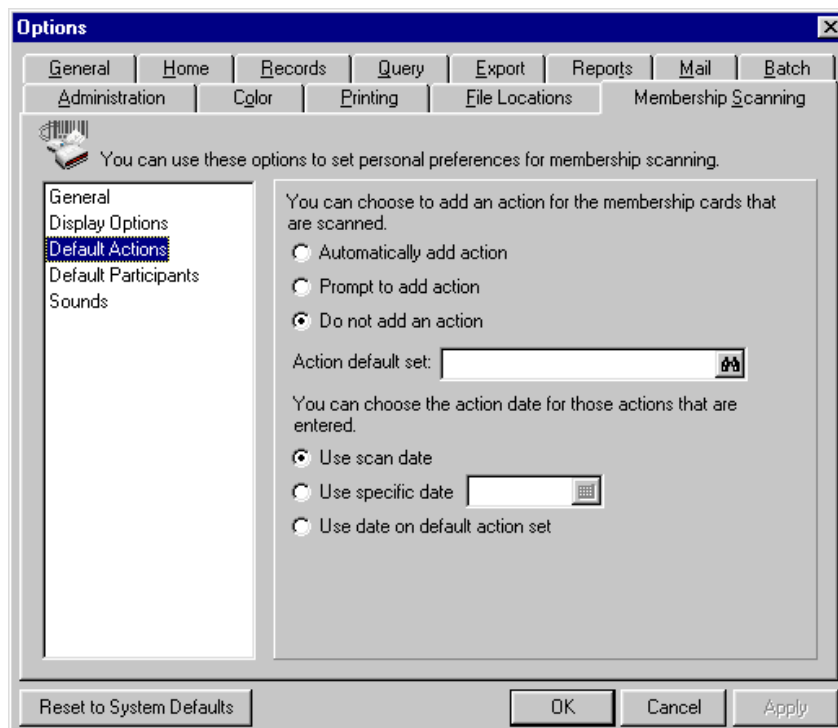
Note: If you select **Do not add action**, you can manually add actions by clicking **Add Action** on the Membership Scanning action bar. For more information, see "Adding Actions from Membership Scanning" on page 83.

4. You can add an action for the membership cards you scan by selecting **Automatically add action** or **Prompt to add action**.

Before you select how to add action records, we recommend you consider the circumstances of the action record you want to add when selecting **Automatically add action** or **Prompt to add action**. For example, if you know that every card you scan is for members attending a lecture, select **Automatically add action** so you can quickly add an action record with the same information for each member. Later, you can run an action report to process detailed information about the lecture's attendance. For more information about action reports, see the *Reports Guide*.

If certain members are attending the lecture and not every card you scan applies to the action record, select **Prompt to add action** to display a message asking you each time you scan a membership card if you want to add the action record. This way, you can select to add the action only for members that come through your line who are attending the lecture.

5. In the **Action Default set** field, you can select an action default by clicking the binoculars.The Field default sets screen appears.

If you established a default action you want to use when you are scanning, highlight it in the list and click **OK**. To edit an existing default action set, highlight it and click **Open**.

Warning: Required fields are not verified on the New Default Set screen. You are able to save and close the default action, even if required fields are missing. However, if required fields are missing from the default action, when the card is scanned, an alert message appears. Then, the New Action screen appears during the scan session and you must enter the missing information on the action record before another card can be scanned. For more information about manually adding information to the action record, see "Adding Actions from Membership Scanning" on page 83.

6. To create a new default action record, click **New**. The Default Set screen appears.

7. In the **Name** field, enter a name for the action default set. For example, you are scanning cards for entrance to the current Alfred Stieglitz exhibit at your museum. You want to add an action to include each member who attends the current exhibit in a mailing next month, inviting them to the opening of a new Ansel Adams exhibit. In the **Name** field, enter "Include in Adams exhibit opening invite mailing".

8. From the list on the left, highlight **General**. The **General** grid appears on the right.

Note: If you select **Use scan date** or **Use specific date** on the Membership Scanning tab of the Options screen, this date overrides the date entered on the action default set.

9. In the grid on the right, make selections to define the default action you are creating. For example, to automatically remind you of the action you are creating and adding to members' records, mark the **Auto remind** checkbox. Enter the scan date as the **Action Date**. Select "Normal" as the **Priority**, "Open" as the **Status**, "Invitation" as the **Type**, and "Mailing" as the **Category**. Enter as a **Completed Date** the date you will send the mailing and select "week(s)" as your **Reminder Units**. For more information about action records and each of these fields, see the Actions chapter of the *Constituent Data Entry Guide*.
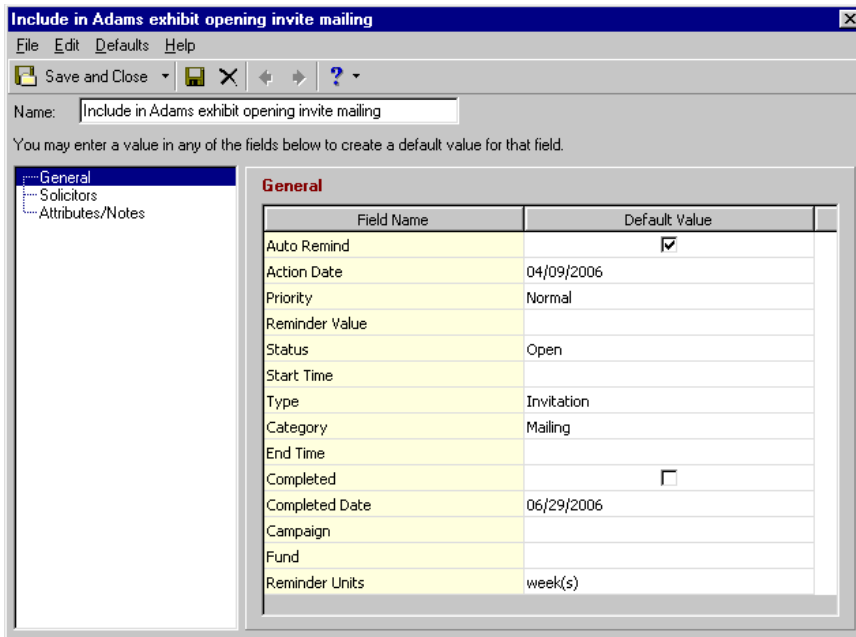
10. Select **Solicitors** from the list on the left. The **Solicitors** grid appears on the right.
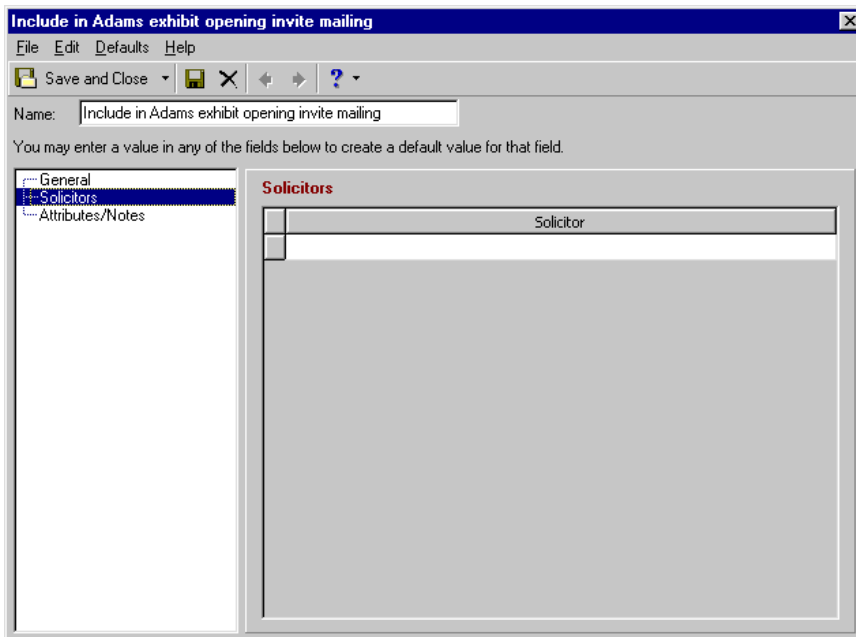
11. Click in the **Solicitor** grid. The binoculars appear.

12. Click the binoculars. You want to search for a solicitor to assign to the action. The Open screen for constituents appears. For more information about using the Open screen to search for a constituent, see the Program Basics chapter of the *Program Basics Guide*. For more information about solicitors, see the Solicitors chapter of the *Constituent Data Entry Guide*.

13. Select **Attributes/Notes** from the list on the left. The **Attributes** grid and **Action notes** box appears on the right.

14. In the **Category** column, select, an attributes category. For example, select "Attended?".

15. In the **Description** column, select an attribute description. For example, select "Yes".

16. In the **Date** column, enter a date to appear on the action.

17. In the **Comments** column, enter, comments, such as "B&W Photography".

18. In the **Action notes** box, enter any notes for the action. For example, you can enter "Museum members who attended the Alfred Stieglitz photography exhibit may be interested in attending the opening of the Ansel Adams exhibit."

19. To save and close the new default action settings, click **Save and Close** on the toolbar. You return to the Field default sets screen and the new set you created appears in the list.

To only view action record default sets you create, mark **Only show my default sets**. If you do not mark this checkbox, any default action set created by a *Raiser's Edge* user appears in the Field default sets screen.

Warning: When you complete scanning cards for which you want to automatically add an action, remove the default set from the **Action default set** field. Otherwise, you can create action records by mistake. For more information about action records, see the Actions chapter of the *Constituent Data Entry Guide*.

20. Highlight the default set to use during your scan session and click **OK**. You return to the Options screen. The name of the default action you selected or created appears in the **Action default set** field.
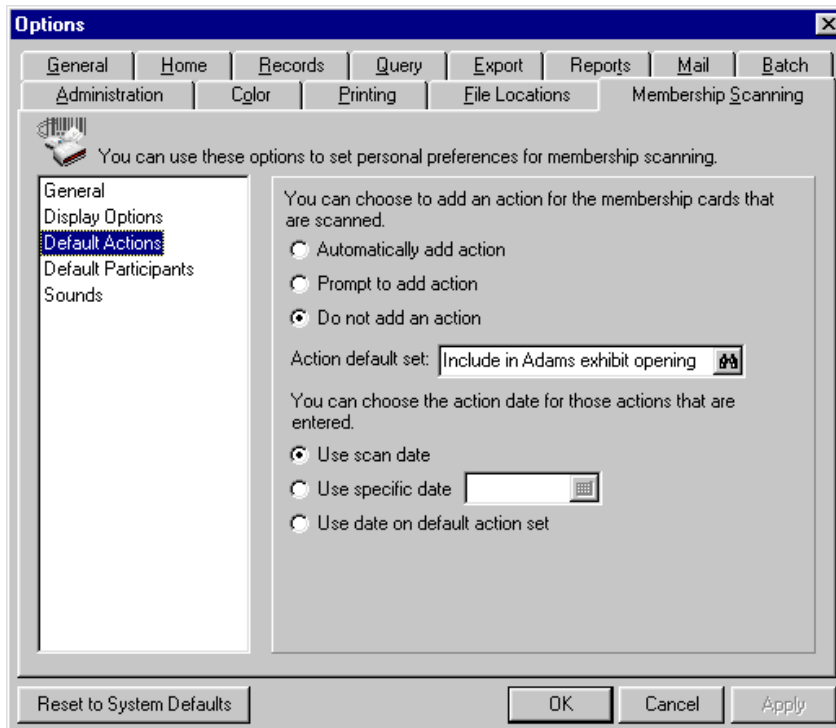
Note: If you select **Use scan date** or **Use specific date** on the Membership Scanning tab of the Options screen, this date overrides the date entered on the action default set.

21. Select an action date. You can select the **Use scan date**, **Use specific date**, or **Use date on default action set** option, depending on which date you want to use. If you mark the **Use specific date** option, enter a date in the field to the right of the option or click the calendar to select a date.

22. To apply and save your changes, click **Apply**. To save your changes and close the Options screen, click **OK**. For more information about the Color tab, see the User Options chapter of the *Program Basics Guide*.

More About Default Actions User Options

Note: In this example, **Prompt to add action** is selected in the **Default Actions** User options.

You can add an action to either the joint member or the primary member's constituent record. However, the person must be a constituent in your database. If the card you scan is for a joint member who has a constituent record, a message appears, asking if the action should be added to the joint member's or primary member's record. If the cardholder is the primary member, the message does not appear.
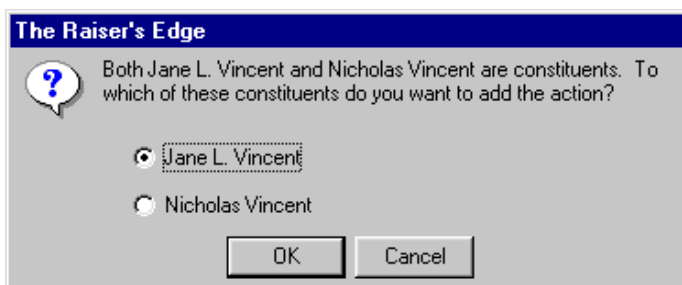
If you enter **an action default set in the Action default set** field that includes all required membership fields and select **Automatically add action** in User Options, then the action record does not display when you scan a membership barcode for primary members. For joint members with a constituent record, the message appears, asking if the action should be added to the joint member's or primary member's record. For non-constituent joint members and cardholders, the action is added to the primary member's record, without the action record displaying. **Add Actions** on the action bar changes to **Edit Action automatically on the Membership Scanning page**.
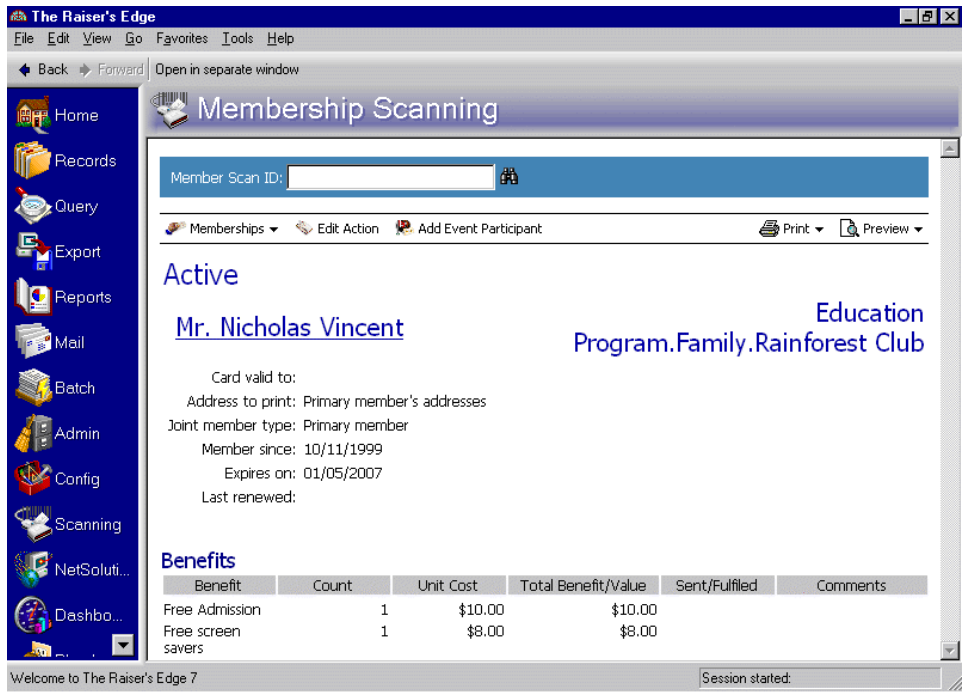
> **Note**: In this example, the **Status** field for Action records has been marked as Required in *Configuration* by the Supervisor. For more information about making fields required, see the Configuration chapter of the *Configuration & Security Guide*.

If a required field is missing from the default action set selected in User Options, you receive a message stating the required field is missing.

When you click **OK**, the action record appears so you can enter the required field data.

‣   **Setting Default Participants for Membership Scanning**

By selecting **Default Participants** from the list on the left, you can save time and help maintain data entry consistency by automatically adding participant records for your members. Before making any default participant selections, we recommend you consider your organization's procedures before you begin scanning any membership cards. For example, if every member coming through your line plans to attend a luncheon and you want to add a participant record for each member, automatically adding participant records saves you time and ensures the same information is added to each participant record. However, if a participant record does not apply to every membership card you scan, you do not want to automatically add participant records. If you do this, participants records can be added for members for events they are not attending, causing you to spend additional time correcting information in your database.

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools**, **User Options**. The Options screen appears.

2. Select the Membership Scanning tab.

3. From the list on the left, select **Default Participants**. The fields, options, and checkboxes for this selection appear on the right.
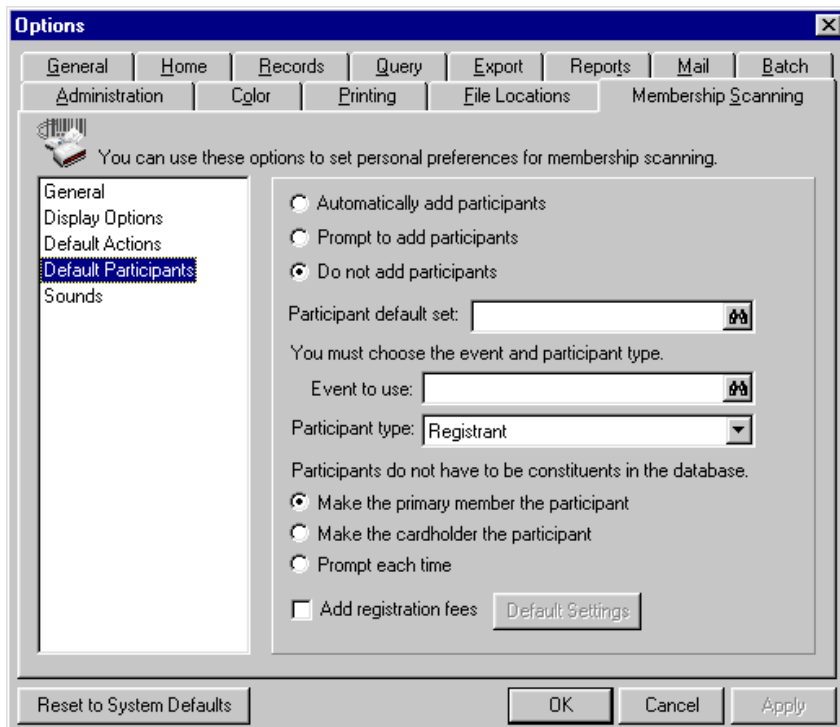
Note: If you select **Do not add participants**, you can manually add participants by clicking **Add Event Participant** on the Membership Scanning action bar. For more information, see "Adding Participants from Membership Scanning" on page 86.

4. You can add a participant record for the membership cards you scan by selecting **Automatically add participants** or **Prompt to add participants** option.

Before you establish a participant default set, you should consider the circumstances of the participant record you want to add when selecting **Automatically add participants** or **Prompt to add participants**. For example, if you have a separate line for members attending a luncheon, you can select **Automatically add participants** so a participant record is added for every member that comes through your line. If you do not have separate lines for members attending the luncheon, select **Prompt to add participants** so the participant record is not automatically added for every membership card you scan. This way, you can select to add only the participants for the luncheon that come through your line.

5. In the **Participant default set** field, click the binoculars to search for a default event to use. The Field default sets screen appears.

If you established a default participant record you want to use when you scan cards, highlight it on the Field default sets screen and click **OK**. To edit an existing default participant set, highlight it on the Field default sets screen and click **Open**.

6. To create a new default participant record, click **New**. The New Default Set screen appears.
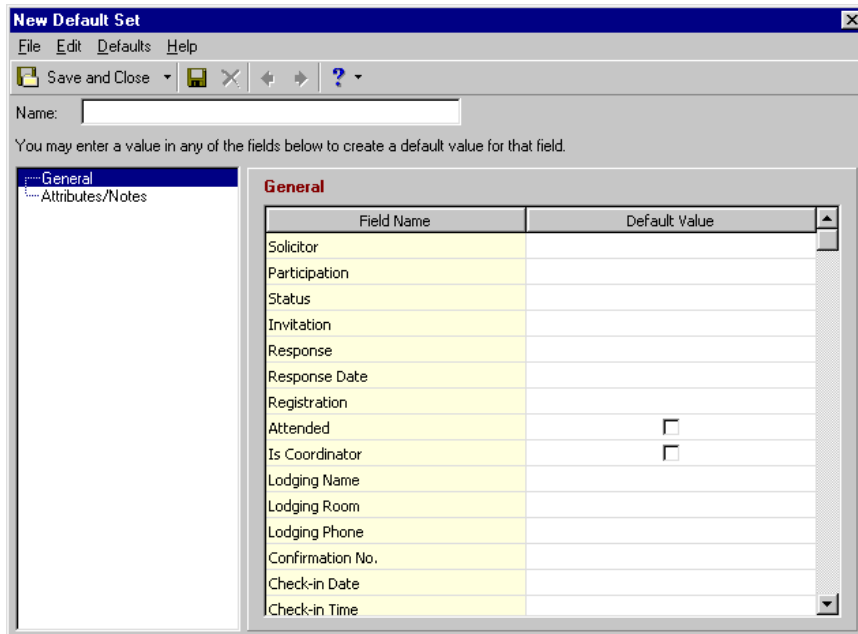
7. In the **Name** field, enter a name for the default participant record to use during scanning. For example, each member whose card you scan for entrance to your the Build the Playground fundraiser gala needs a participant record created for the Playground Opening Event. Enter "Playground Opening Participant".

Warning: Required fields are not verified on the New Default Set screen. You are able to save and close the default participant record, even if required fields are missing. However, if required fields are missing from the default participant record, when the card is scanned, a message appears. Then, the New Participant screen appears when you scan a card and you must enter the missing required information on the participant record before another card can be scanned. For more information about manually adding information to the participant record, see the section "Adding Participants from Membership Scanning" on page 86.

8. In the grid on the right, make selections for this default participant record. For example, in the **Participation** row, you can select "Attendee"; in the **Status** row, select "Complimentary"; in the **Invitation** row, select "Invited"; in the **Response** row, select "Requested more information"; and in the **Registration** row, select "Registered". For more information about participant records and these fields, see the *Event Management Data Entry Guide*.

9. From the list on the left, select **Attributes/Notes**. The **Attributes/Notes** grid and **Notes** box appears on the right.
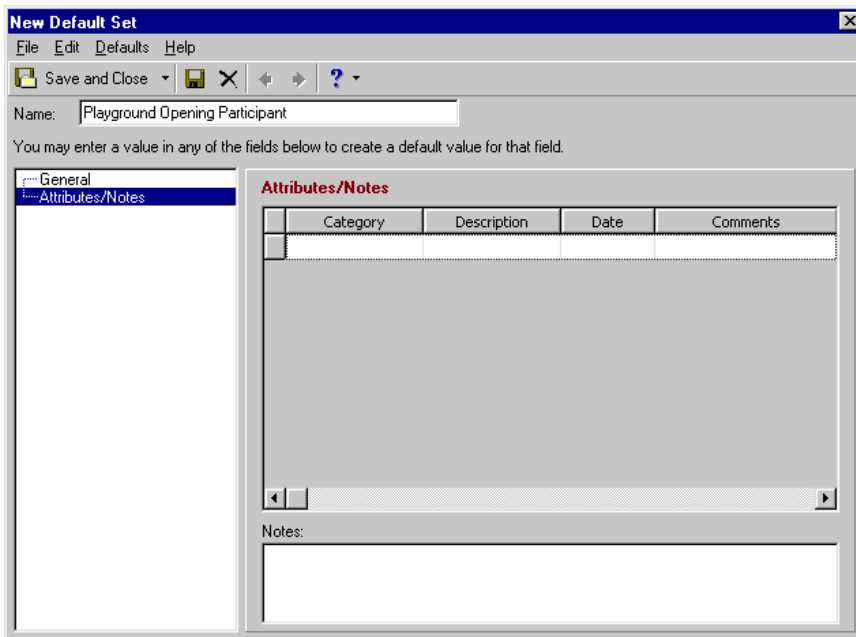
10. In the **Category** column, you can select "Shirt Size".

11. In the **Description** column, you can enter "Large".

12. In the **Date** column, enter the date set for the playground opening.

13. In the **Comments** column, you can enter "Pre-registered at gala".

14. In the **Notes** box, you can enter, "Attendees of the Build-the-Playground fundraiser gala are automatically registered for the Playground Opening event next spring."
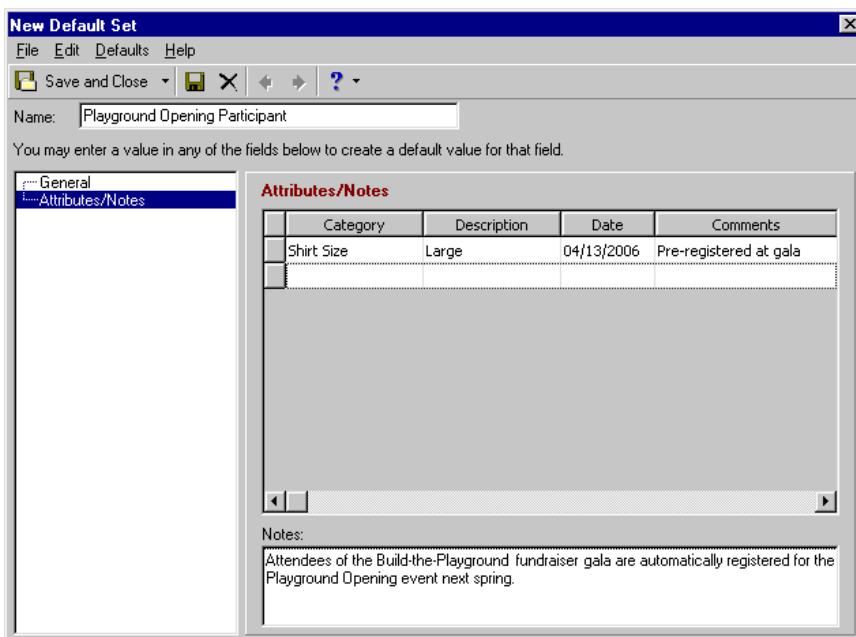
15. To save and close the new participant default set, click **Save and Close** on the toolbar. You return to the Field default sets screen. The new set you created appears in the list.

To view only participant record default sets you create, mark **Only show my default sets**. If you do not mark this checkbox, any default participant set created by a *Raiser's Edge* user appears in the Field default sets screen.

Warning: When you complete scanning cards you want to automatically add a participant record for, remove the default set from the **Participant default set** field. Otherwise, you may create participant records by mistake. For more information about participant records, see the *Event Management Data Entry Guide*.

16. Highlight the default set to use and click **OK**. You return to the Options screen. The default participant record you selected appears in the **Participant default set** field.
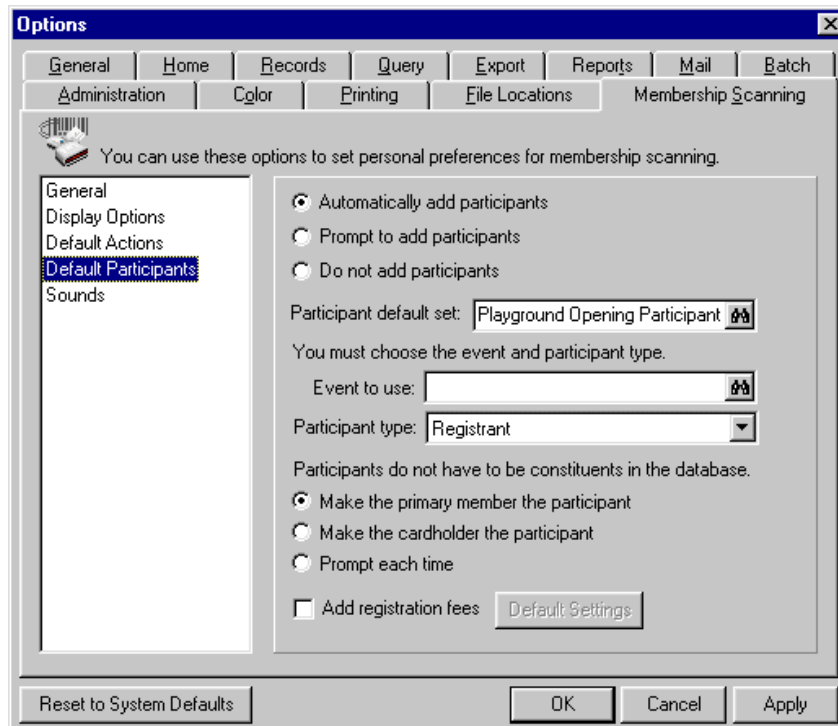
17. In the **Event to use** field, enter the name of an event or click the binoculars to search for one. For more information about using the Open screen, see the Program Basics chapter of the *Program Basics Guide*.
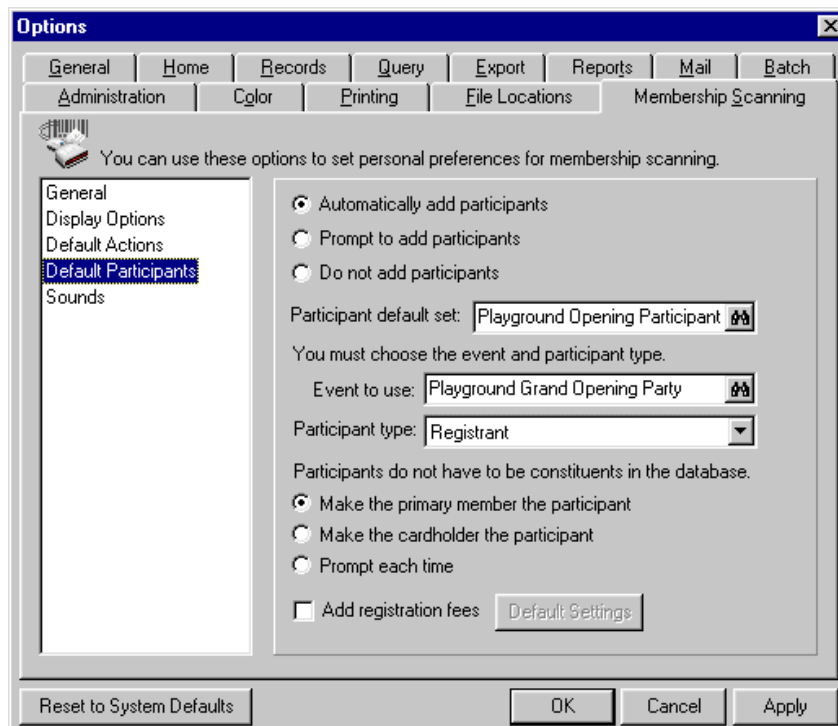
18. In the **Participant type** field, select whether the participant is a Registrant, Guest, or Sponsor.

19. Under **Participants do not have to be constituents in the database**, select to **Make the primary member the participant**, **Make the cardholder the participant** (in this option, "cardholder" refers to a non-constituent cardholder, the joint member, or the primary member), or to **Prompt each time**. If you select **Prompt each time**, the program asks you if the primary member is the participant or if the cardholder is the participant when you add participant records from the Membership Scanning page.

20. Mark the **Add registration fees** checkbox to add registration fee information along with the gift default information. For example, a member has his card scanned for entrance to your zoo. A default participant record is established for him for a seminar that requires he bring one canned good to feed the homeless. This can be added as a Gift-in-Kind. For more information about event gifts, see the *Event Gifts Guide*.

Note: If **Default Settings** is disabled, select an event in the **Event to use** field.

21. Click **Default Settings**. The Registration Default Settings screen appears. Selections on this screen are similar to the Registration Fees/Donations tab of a participant record.

	Unit	No. Units	Gift Amount	Receipt Amount	Date	Comments
	Adult	2	$25.00	$25.00	05/13/2006	

22. Enter registration information for the fields you want. For more information about entering registration fees, see the Registration Fees section of the *Event Management Data Entry Guide*.

23. To return to the Options screen, click **OK**.
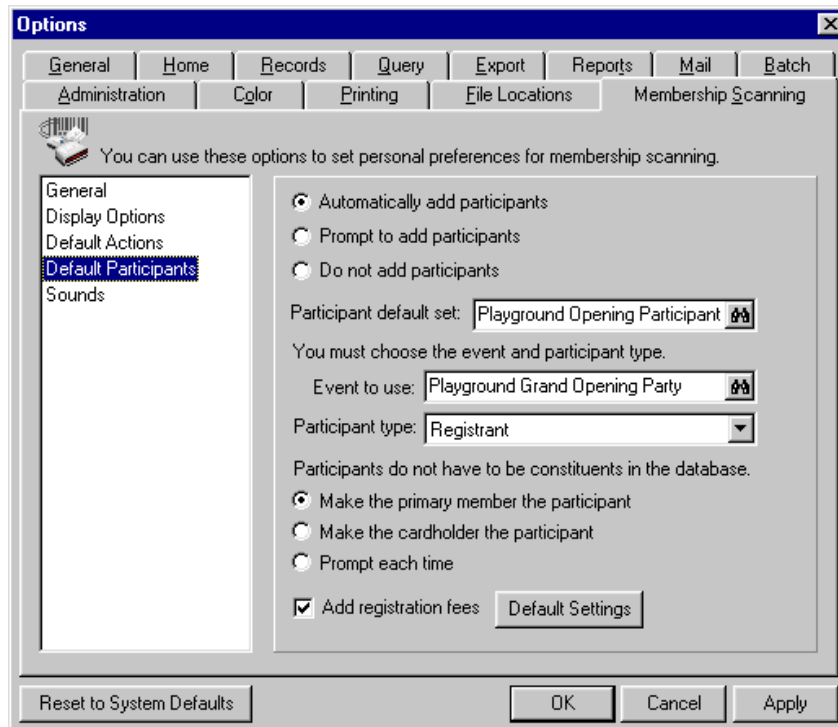
24. To apply and save your changes, click **Apply**. To save your changes and close the Options screen, click **OK**. For more information about the Colour tab, see the User Options chapter of the *Program Basics Guide*.

More About Default Participant User Options

You can add the primary member, joint member, or just a cardholder as a participant for an event when you use the optional module *Event Management*.

If you set up a **Participant Default** in User Options that includes all membership required fields, then the participant record does not display when you scan a membership barcode if you select to automatically add participant records. **Add Event Participant** on the action bar changes to **Edit Event Participant** automatically on the Membership Scanning page.
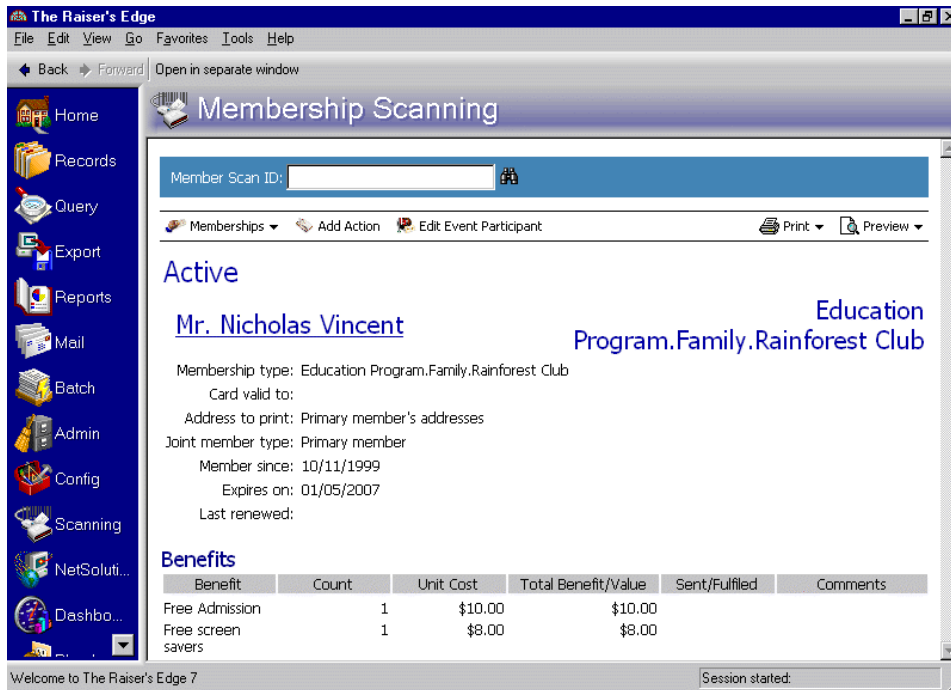
> **Note**: In this example, **Automatically add action** is selected in **Default Participants** User Options. The **Status** field for Participant records has been marked as Required in *Configuration* by the Supervisor. For more information about making fields required, see the Configuration chapter of the *Configuration & Security Guide*.

If a required field is missing from the default participant set selected in User Options, you receive a message stating the required field is missing.

Click **OK.** The participant record appears, so you can enter the required data.

▶ **Adding Sounds for Membership Scanning**

> **Note**: To hear sounds in *Membership Scanning,* use any .wav file with *The Raiser's Edge*.

You can select sound files to hear when you scan membership cards with a membership status of Active, Lapsed, or Dropped. Select sounds of your choice that quickly let you know you just scanned a membership card with a particular membership status. For example, you can add a bell sound for Lapsed membership cards. Whenever you hear the bell, you automatically know you just scanned a Lapsed membership card, and the member should renew his membership.

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools**, **User Options**. The Options screen appears.

2. Select the Membership Scanning tab.

3. From the list on the left, select **Sounds**. The available selections for **Sounds** appear on the right.
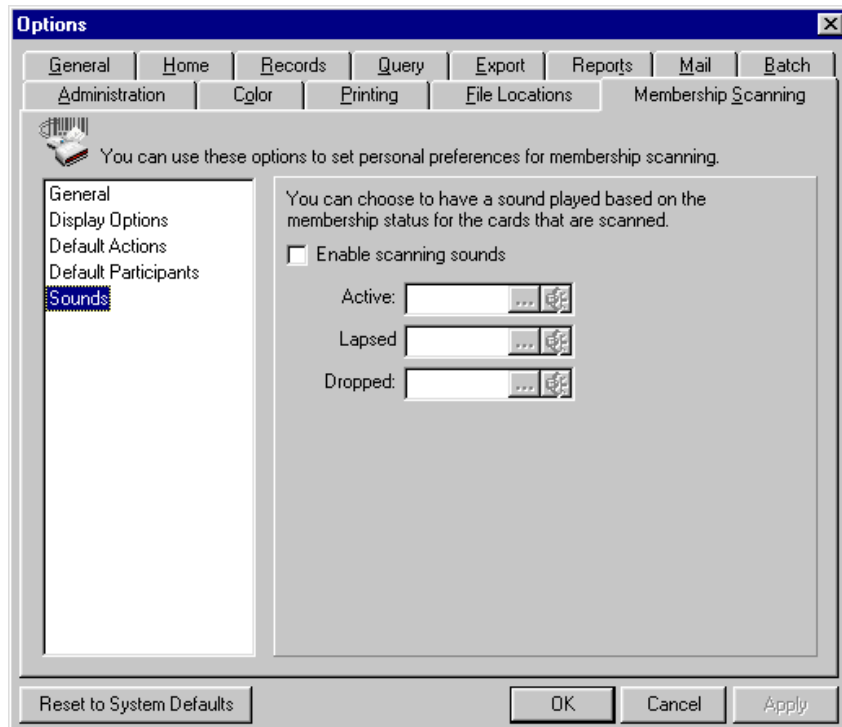
4. To have a sound play, based on the membership status when you scan the membership card, mark **Enable scanning sounds**. Speakers and sound support must be present on your own computer for this to work correctly.

5. In the **Active**, **Lapsed**, and **Dropped** fields, click the ellipsis button to browse to the sound file stored on your computer. To hear the sound, click the far right button in the appropriate field you want to hear.

6. To apply and save your changes, click **Apply**. To save your changes and close the Options screen, click **OK**. For more information about the Colour tab, see the User Options chapter of the *Program Basics Guide*.

   To undo any changes you made and re-establish all program settings, click **Reset to System Defaults**. To exit User Options without saving your most recent changes, click **Cancel**.

Basic Processes of Membership Scanning

Note: *Membership Scanning* is additional functionality with the optional module *Membership Management*.

In *Membership Scanning*, it is important to learn basic processes before you access the variety of special features available to you in this module. For example, in the next chapter, you learn how to renew, upgrade, and add new memberships, as well as correct a cardholder's address, directly from the Membership Scanning page. However, before you can take advantage of these special features, you must first learn the basic process of scanning membership cards.

Probably, the most common process you will perform using *Membership Scanning* is to scan in membership cards for entrance to your organization's museums, tours, historic buildings, events, fundraisers, or gift shop discounts, etc.

Keep in mind that a cardholder does not have to be a member in your database. For that reason, you scan cards for primary and joint members, but also scan guest passes for cardholders that do not have a constituent or relationship record in your database. The processes of scanning cards for non-constituent cardholders and primary members is the same; the information that appears on the screen varies. This depends on whether the cardholder is a joint member, primary member, or just a non-constituent cardholder. For example, you scan Jane Vincent's card. Jane is listed as a joint member on Nicholas Vincent's membership record. Therefore, Nicholas's membership information displays on the Membership Scanning page.

To scan memberships, you need a barcode scanner that reads 12 point 3 of 9 font, which is what the Membership Cards mail task in *Mail* produces. Attach the barcode scanner to your computer through the keyboard.

Scanning Membership Cards

Note: If you use the Membership Cards mail task in *Mail*, you can print your membership cards using Blackbaud Forms. This way, you can customize your organization's membership cards with your colors, logo, and personal messages. For more information about Blackbaud Standard Forms, visit http://forms.blackbaud.com. You can also contact Forms through e-mail at businessforms@blackbaud.com by calling 866-4-BB-FORMS (866-422-3676), or by fax at 843-216-6100. For more information about the Membership Cards mail task in *Mail*, see the *Mail Guide*.

When you scan in a primary member's card, the Membership Scanning page displays the membership information for that member. When you scan in a cardholder's card who is not an actual member with a record in your database, the name printed on the card appears at the top of the screen. The rest of the membership information that displays is for the primary member. Refer to the **Card type** and **Primary member** displays on the Membership Scanning page to assess if the cardholder is merely that, or a joint or primary member. For information about selecting display options for the Membership Scanning page, see the procedure "User Options" on page 13.
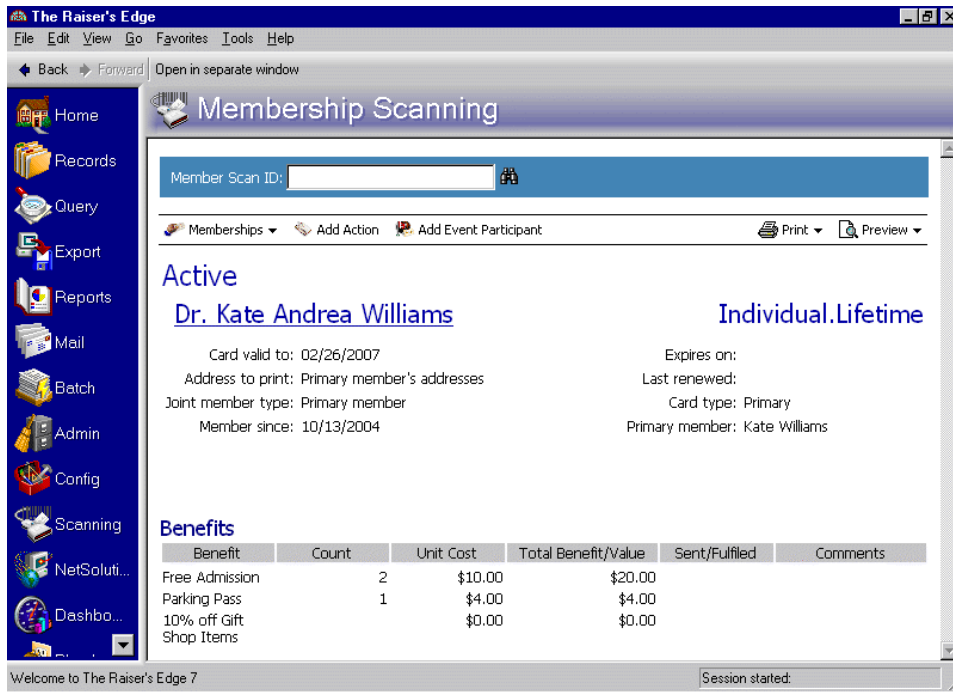
Note: **Card type** and **Primary member** only display if you select these fields in **Display Options** on the Membership Scanning tab in User Options. For more information about Display Options, see "User Options" on page 13.

Before scanning, place your cursor in the **Member Scan ID** field. Your cursor must be in the **Member Scan ID** field for the scan to access the appropriate membership information.

‣ **Scanning a membership card**

> *Scenario:* You work the front desk at the City Museum. This month's French Impressionist exhibit opens today. Your museum's members get a $5 discount on the entrance fee to the exhibit. First in line to view the exhibit is Mr. Anthony Ellis, who says he is a Benefactor in the City Museum's Arts Program. He is the primary member and cardholder on his membership. Scan his membership card to register his admittance to the exhibit and view his membership information to verify that he qualifies for the $5 admission discount.

Note: *Membership Scanning* is a front office tool. For example, many members have the potential to see your computer screen as you scan membership cards for entry. If you prefer to maximize the Membership Scanning page, select **View**, **Raiser's Edge bar** to remove the bar on the far left.

1. On the Raiser's Edge bar, click **Scanning**. The Membership Scanning page appears.
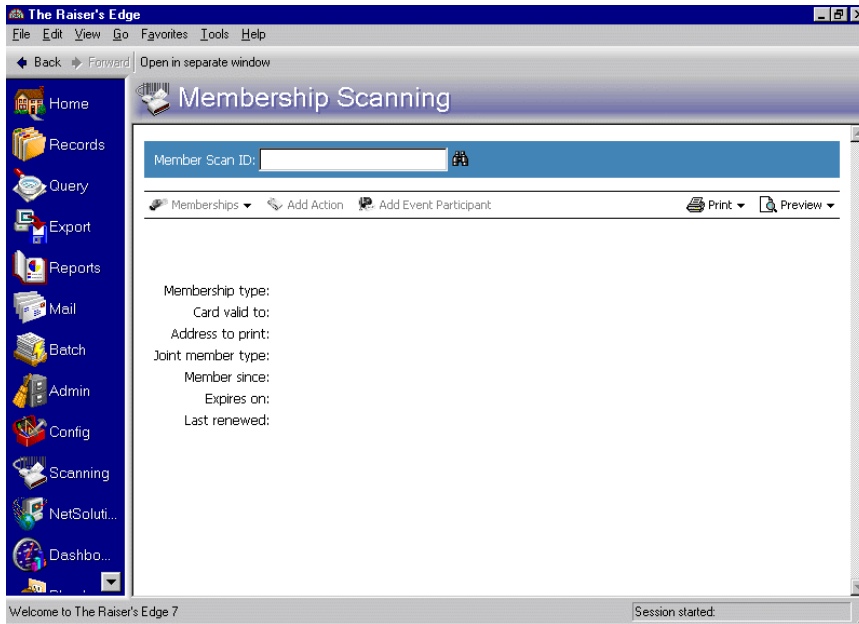
Note: You can also search using the binoculars or enter the numeric barcode in the **Member Scan ID** field. For more information, see "Member Scan ID Field" on page 4.

2. Click in the **Member Scan ID** field. Your cursor appears in the field.

3. To scan Mr. Ellis's membership card, hold the scanner over the membership barcode and press the button until it beeps. Or, if you have a scanning device, slide the card. Mr. Ellis's membership information appears on the screen.
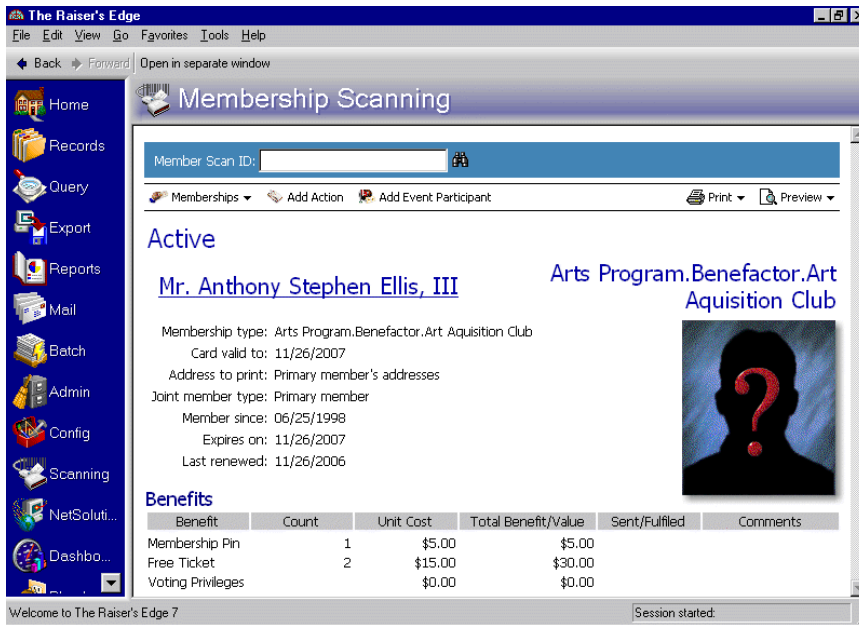
Mr. Ellis's name appears across the top of the screen because his name is printed on the card. The membership standing of "Active" appears in the top left of the screen, so you know he is eligible to receive membership benefits. A generic photo ID displays because the **Show photo ID** User Option is selected, but a photo file has not been entered in the **Photo ID** field on Mr. Ellis's Primary Member's Card Information screen. For more information about Membership Scanning User Options, see "User Options" on page 13. For more information about the membership card screen, see the *Membership Data Entry Guide*.

4. The **Membership type** display shows Mr. Ellis is a member of the Arts Program, giving at the Benefactor level, in the sub-category of the Art Acquisition Club.

5. The **Card valid to** display verifies his card is valid to use at the museum at this time.

   With this information, you realize that Mr. Ellis does, in fact, qualify for the museum member $5 discount.

Note: From the **File** menu bar, you can select **Clear Display** to clear a member's information displaying on the Membership Scanning page.

6. Continue by scanning your next membership card.

Printing Membership Cards from Membership Scanning

At times, it may be necessary for you to print a membership card or a temporary card when a membership is scanned. For example, one of your zoo's members comes to the entrance gate and tells you she left her card at home. If you have a printer at the location where you are scanning cards and your zoo's policy allows you to print temporary cards at the gate, you can print a membership card directly from the Membership Scanning page.

Warning: When you print membership cards from *Membership Scanning*, all of the cards for that membership record print. For example, you upgrade Julie Bach's membership and want to print a new membership card for her. A card also prints for any joint member card or guest pass recipient on her membership record. A card does not print if "Printed" or "Do Not Print" is selected in the **Status** field on the membership card screen.

If one of your members wants to upgrade or rejoin their membership, which you can do from the Membership Scanning page, you can print a new membership card for her with the upgrade or rejoin information. For more information about upgrading or rejoining memberships from *Membership Scanning*, see "Changing Membership Status After Scanning a Card" on page 60.

‣ **Printing a membership card from Membership Scanning**

> *Scenario:* Your town's Preservation Society gives tours at a historic house to raise money for their efforts. You work at the door on Saturday afternoons. One of the Preservation Society members, Lucy Avdeenko, arrives at the house and wants to show her out-of-town guest her favorite historic home. However, Ms. Avdeenko tells you her wallet was stolen last week and her membership card is gone. Search for Lucy Avdeenko's membership record and print a new membership card for her from the Membership Scanning page.

1. On the Raiser's Edge bar, click **Scanning**. The Membership Scanning page appears.
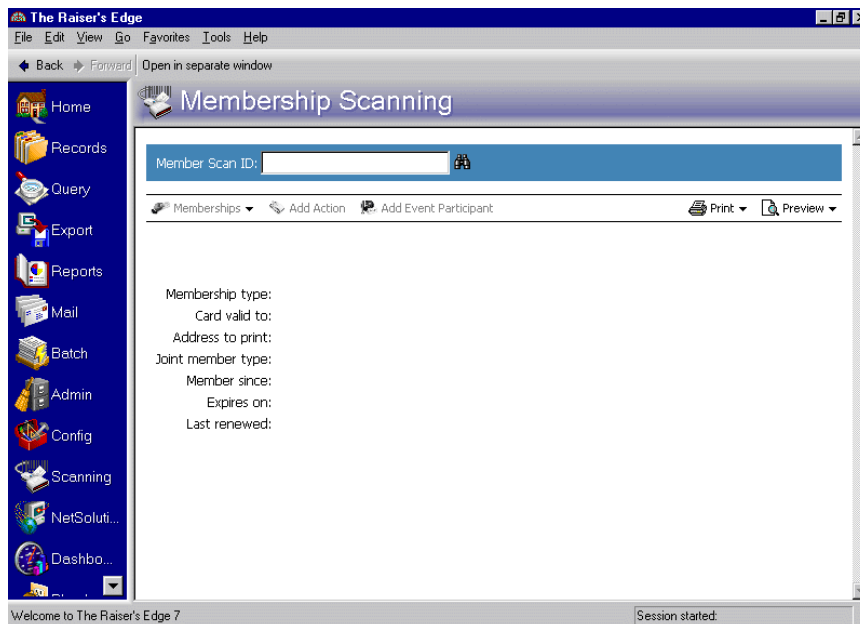
2. Click in the **Membership Scan ID** field. Your cursor appears in the field.

3. Lucy Avdeenko does not have her card for you to scan. You do not know the numbers representing her membership barcode to manually enter in the **Membership Scan ID** field. So, click the binoculars to search for her membership record. The Open screen for memberships appears.

4. Enter Lucy's last and first name in the appropriate fields and click **Find Now**. For more information about using the Open screen, see the Program Basics chapter of the *Program Basics Guide*.

Note: If you use the Membership Cards mail task in *Mail*, you can print your membership cards using Blackbaud Forms. This way, you can customize your organization's membership cards with your colors, logo, and personal messages. For more information about Blackbaud Standard Forms, visit http://forms.blackbaud.com. You can also contact Forms through e-mail at businessforms@blackbaud.com by calling 866-4-BB-FORMS (866-422-3676), or by fax at 843-216-6100. For more information about the Membership Cards mail task in *Mail*, see the *Mail Guide*.

5. When Lucy's name appears in the grid, highlight it and click **Open**. You return to the Membership Scanning page with Lucy Avdeenko's information displaying.
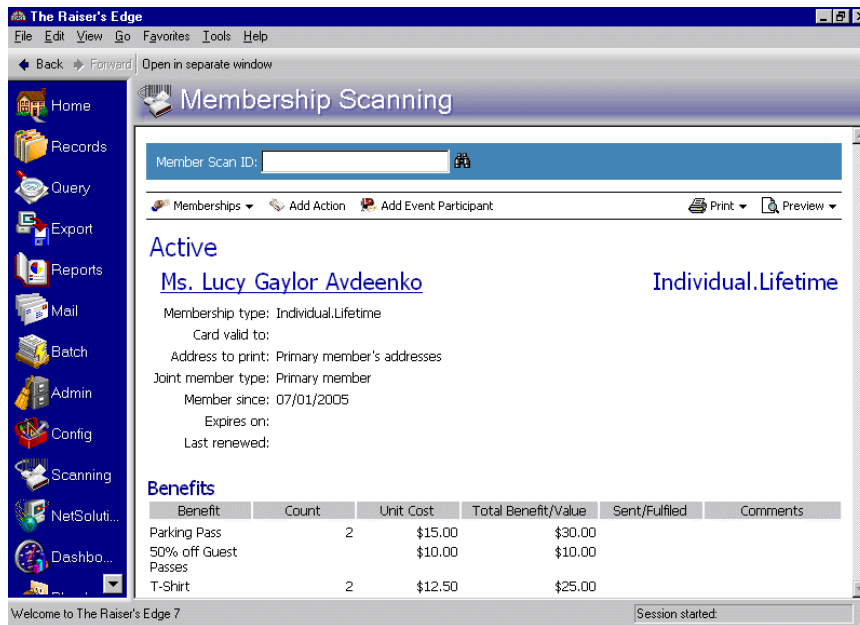
6. On the action bar, click **Print**. A menu appears
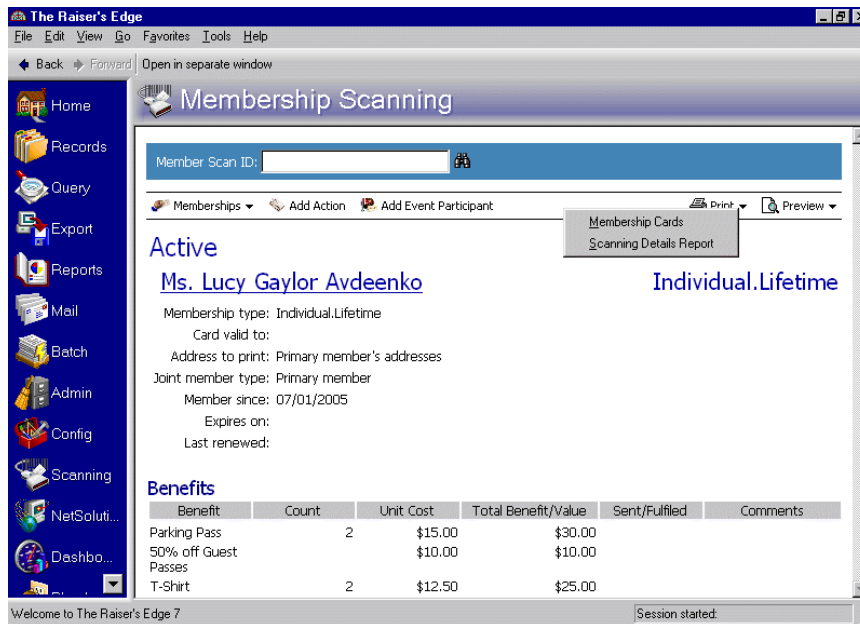
7. Select **Membership Cards**. The Select a Parameter File screen appears.

> **Note**: To edit the parameter file, click **Open**. To create a new parameter file, click **Add New**.

8. Highlight the "Membership Cards-Supervisor" parameter file and click **Select**. A message displays, asking if you would like to change the status in the membership record to show the card has been printed.
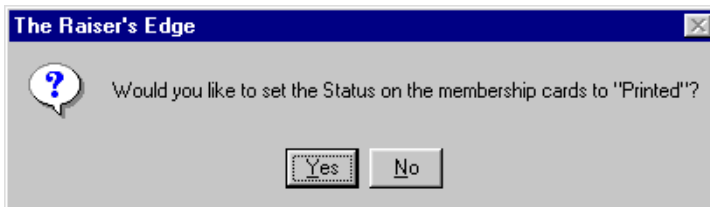
9. To change the **Status** field in the membership record to "Printed", click **Yes**. The card prints automatically to your default printer.

Querying on Scanned Memberships
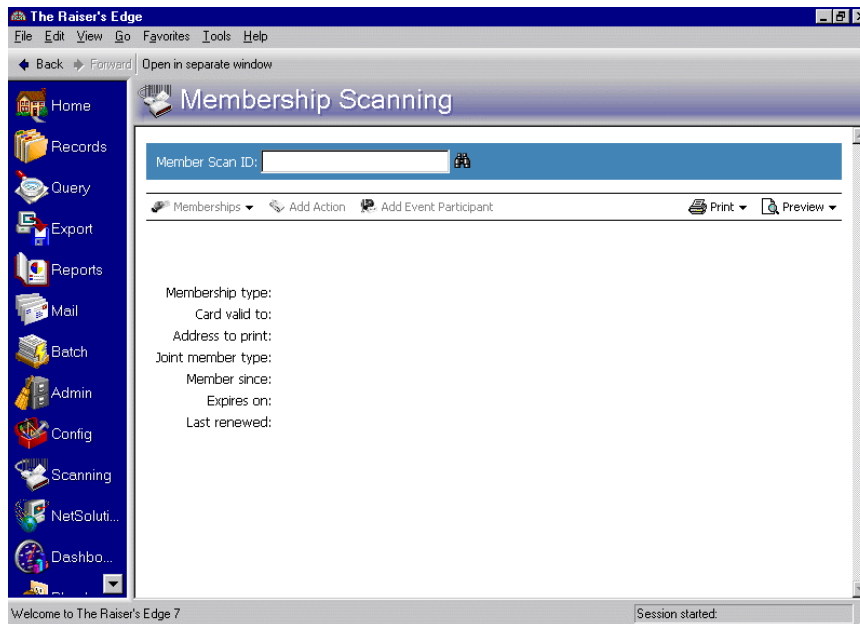
You can create a static query of all memberships for the cards scanned during a scan session. This is not a query of the cards that have been scanned, but of the membership records associated with the cards. Keep in mind that a cardholder does not have to be a member. For example, Dr. Kate Andrea Williams has a membership at your Museum of Science & Discovery with two cards on her membership. Dr. Williams uses one card and gives the other to her baby-sitter to use as a guest pass, so she can take Dr. Williams's daughters to the museum in the afternoons. One membership card has Dr. Williams's name printed on it and the other has her baby-sitter's name, Kiera Hepner, printed on it.

The baby-sitter, Kiera, brings the girls to see the Dinosaur exhibit this afternoon and uses Dr. Williams's guest pass. Kiera is not a member, only a cardholder. When you query on the memberships with scanned activity for today's scan session, Dr. Kate Andrea Williams's name appears in the query. However, she, herself, did not attend the museum this afternoon and the card Kiera used does not even have the doctor's name printed on it. This is because the program queries on the memberships for which a card was scanned, not the actual card. Because Dr. Williams is the primary member with a membership record in your database, her name appears in the query and not the name printed on the guest card. For more information about queries, see the *Query & Export Guide*.

▶ **Creating a membership query for memberships that have scanned activity during a session**

Scenario: You are working the ticket booth at a three-day food and wine festival your organization is sponsoring to raise money for a homeless shelter. Members of your organization receive a $2 discount on the entrance fee. You are scanning membership cards at the front gate, and the director of your organization wants you to run a query every day at the end of a scan session on the members who attended. When you return to the office next week, you will use the query to send thank-you letters to the members who attended the fair and donated to help feed the homeless.

1. On the Raiser's Edge bar, click **Scanning**. The Membership Scanning page appears.

2. From the Raiser's Edge shell menu bar select **File**, **Create Membership Query**.
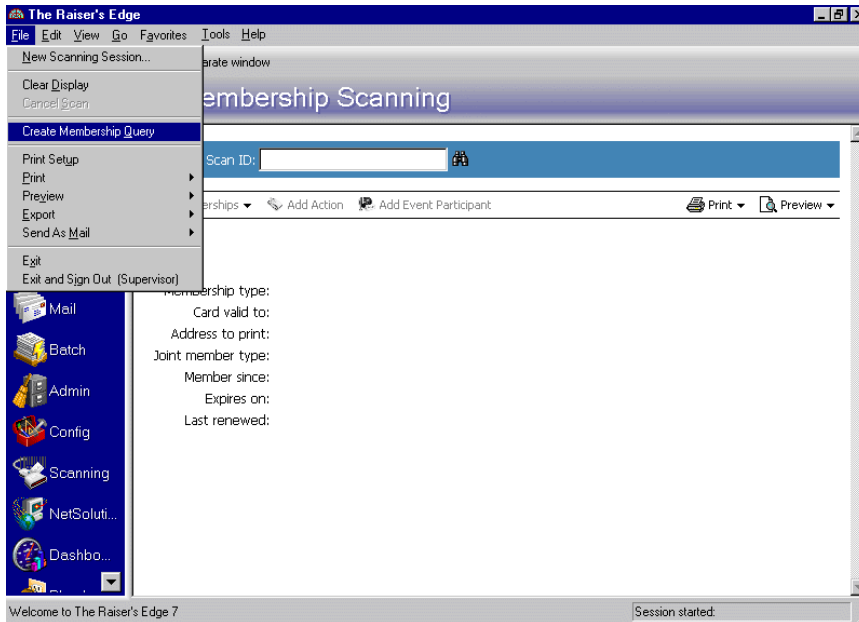
The Save Static Query screen appears.
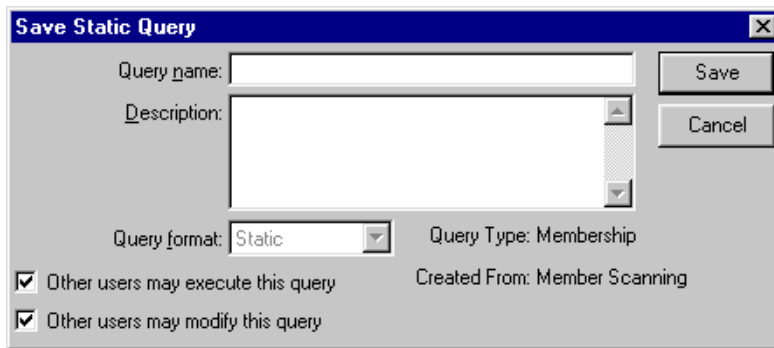
Note: We recommend you assign unique names and descriptions to your queries. This helps you locate them if you use this function extensively.

3. In the **Query name** field, enter a name for the query. For this example, enter "Wine Festival Member Attendees Query - Day 1".

4. In the **Description** field, enter "This query contains membership records that have scanned activity for Day 1 of the Wine Festival."

5. To allow other users to run this query, but not edit it, mark the **Other users may execute this query** checkbox.

6. To allow other users to make changes to the query, mark the **Other users may modify this query** checkbox.

The **Query Format** defaults to "Static" and cannot be changed. For more information about static queries, see the Query chapter of the *Query & Export Guide*.

The **Created From** display shows this query was created in *Membership Scanning* and not from *Query*.

7. To save the query, click **Save**. You can open the query from the Query page. For more information about opening queries, see the Query chapter of the *Query & Export Guide*.

Accessing Records From Membership Scanning

To view or make changes to membership information, you can open a membership record from the Membership Scanning page once a card is scanned. From the Membership Scanning page, you can easily access the membership record associated with the card that is being scanned. The membership record that opens is always that of the primary member.

Sometimes you may want to view or make changes to the constituent record associated with the card that is being scanned. From the Membership Scanning page, you can also access the constituent record stored in your *Raiser's Edge* database, once a card has been scanned. You can open the primary member's constituent record or the joint member's constituent record (if the joint member has her own record in the database).

Note: The **Add Event Participant** link appears only when you have the optional module *Event Management*. For more information, see the *Event Management Date Entry Guide*.

Once a card is scanned, the **Memberships**, **Add Action**, and **Add Event Participant** links on the Membership Scanning action bar are enabled.

When you click **Memberships** on the action bar, a menu of additional options appears.
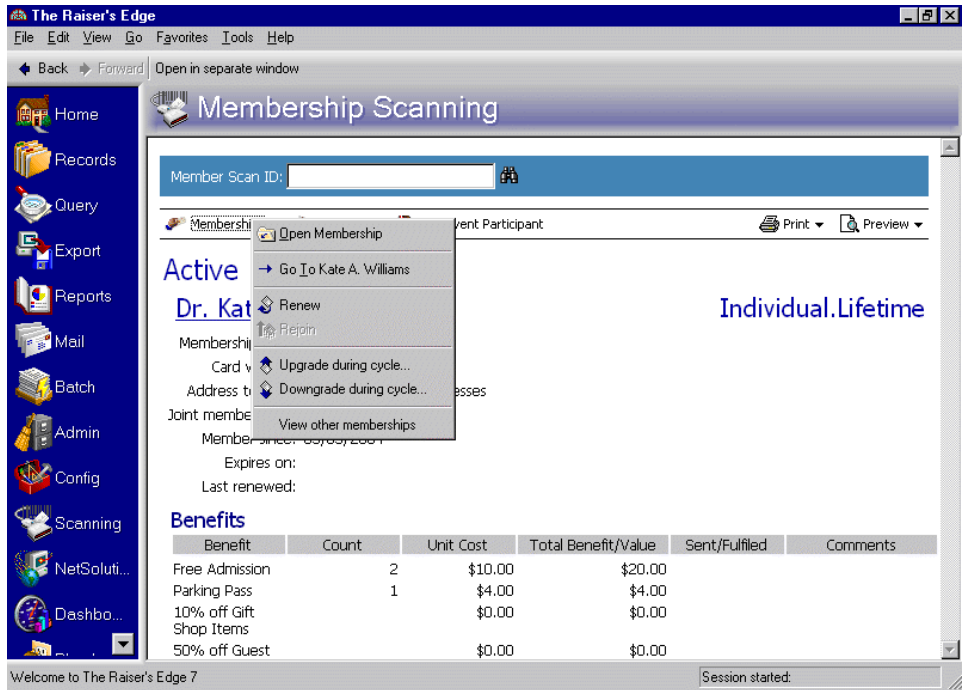
Note: You can also access records for scanned cards from the Scanning Details screen. For more information, see "Scanning Details" on page 8.

From this menu, you can open a membership or constituent record; renew, rejoin, upgrade, or downgrade a membership; and view other memberships for the primary member. This section discusses opening membership and constituent records from the Membership Scanning page. For more information about the other options available on this menu, see "Changing Membership Status After Scanning a Card" on page 60 and "Viewing Other Memberships from Membership Scanning" on page 76.

▶ **Opening a membership record after a card is scanned**

Scenario: Kiera Hepner holds a guest pass on Dr. Kate Andrea Williams's membership to your Science & Discovery museum, so she can bring Dr. Williams's daughters when she baby-sits for them. While scanning Kiera's card for entrance, she tells you the girls are excited about the new Jellyfish exhibit opening next month. To ensure they are included in the mailing inviting them to opening day of the new exhibit, make a note of this on the membership record. Open the membership record from the Membership Scanning page and make changes to the Attributes/Notes tab.

1. On the Raiser's Edge bar, click **Scanning**. The Membership Scanning page appears.
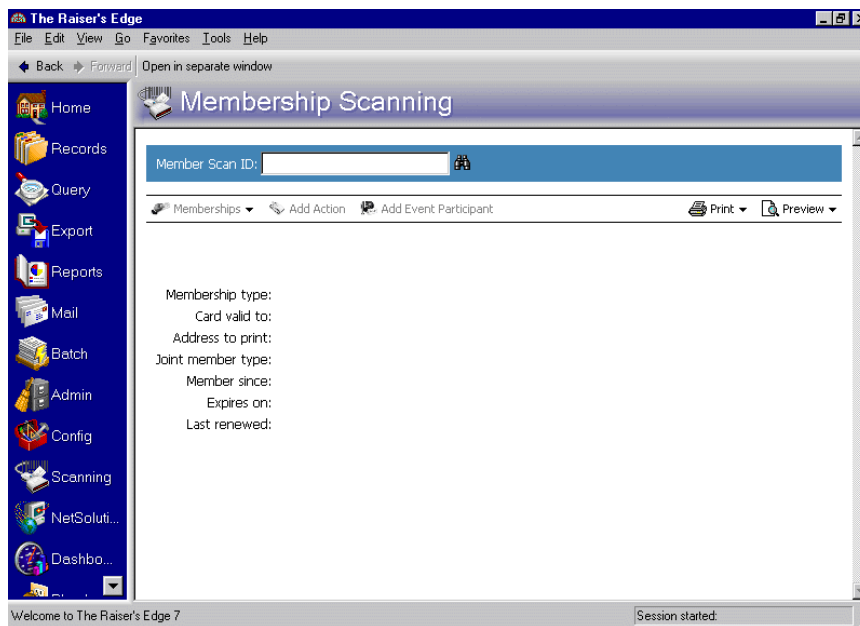
2. Scan in Kiera's guest pass. Dr. Williams's membership information appears on the screen with Kiera's name at the top because it is printed on the card. For more information about scanning a card, see "Scanning Membership Cards" on page 40.
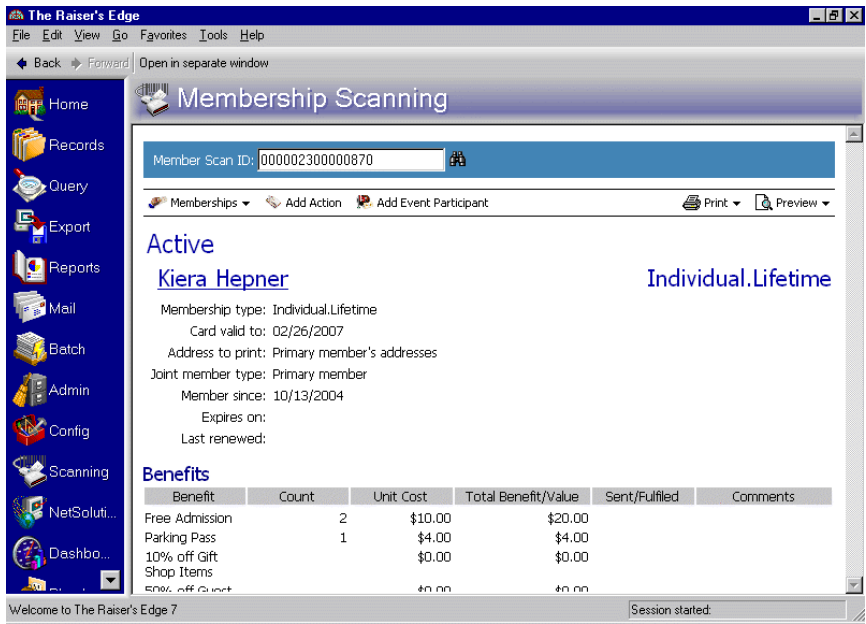
3. On the action bar, click **Memberships**. A menu appears.
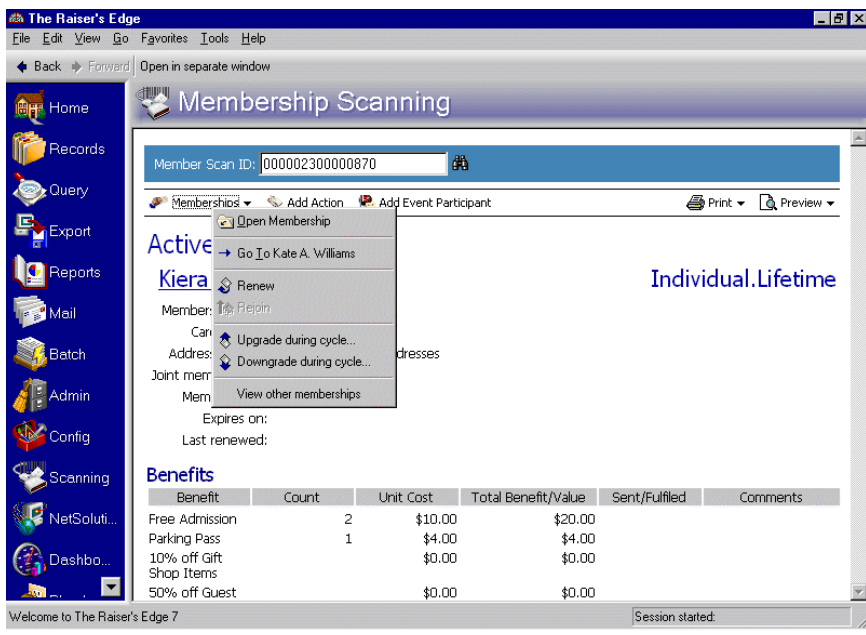
Note: Remember that a cardholder does not have to be a primary member or even present in your database. Therefore, the name printed on the card does not necessarily match the name on the membership record that appears. If the name on the membership card is that of a joint member or cardholder, the membership record for the primary member appears.

4. From the menu, select **Open Membership**. The membership record associated with the scanned card appears. In this case, the membership record for Dr. Kate Andrea Williams appears because she is the primary member with which Kiera's card is associated.

5. Select the Attributes/Notes tab and make the appropriate changes. For more information about the Attributes/Notes tab of a membership record, see the *Membership Data Entry Guide*.

6. To save the changes and close the membership record, click **Save and Close** on the toolbar. You return to the Membership Scanning page.
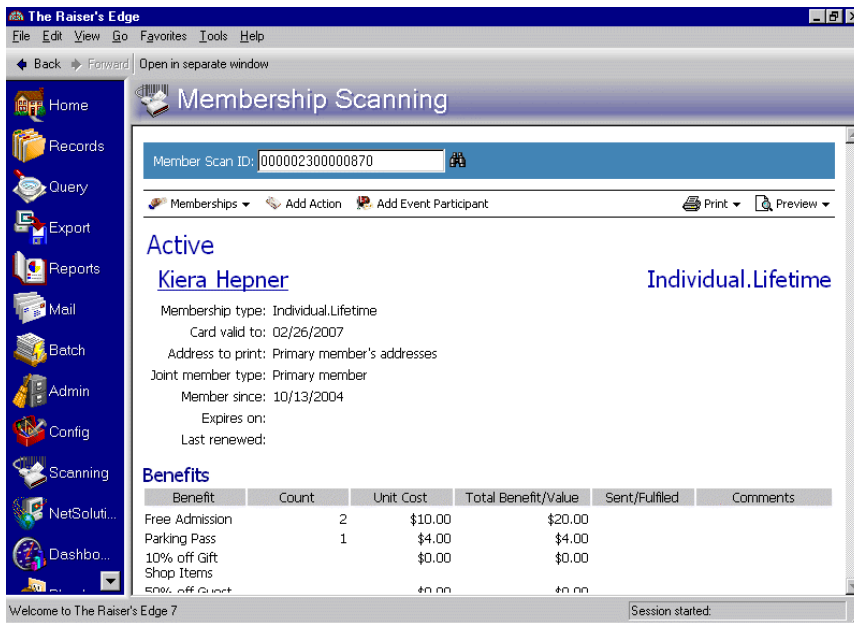
▶ **Accessing a constituent record from Membership Scanning**

1. On the Raiser's Edge bar, click **Scanning**. The Membership Scanning page appears.
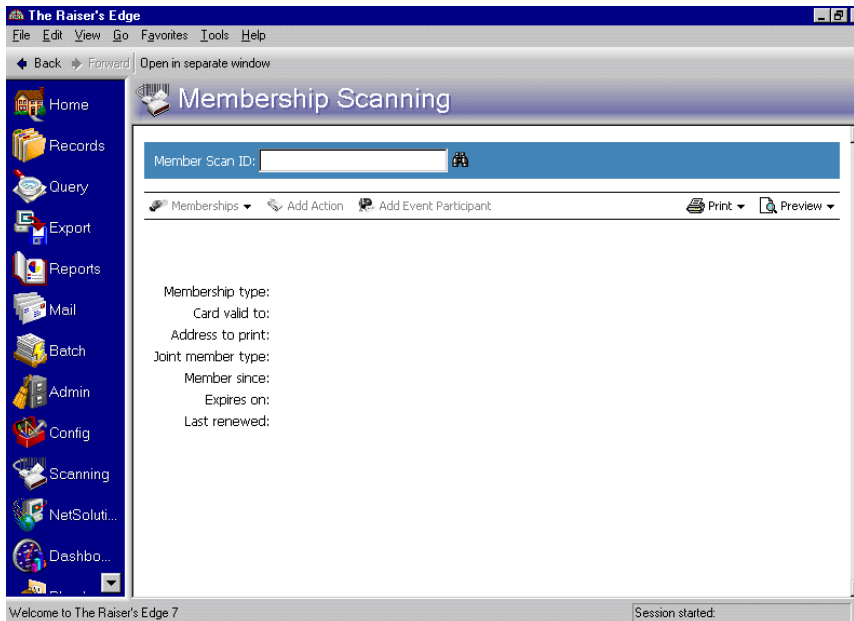
2. Scan in the membership card. The membership information appears on the screen. For more information, see the section, "Scanning Membership Cards" on page 40.

3. On the action bar, click **Memberships**. A menu appears.
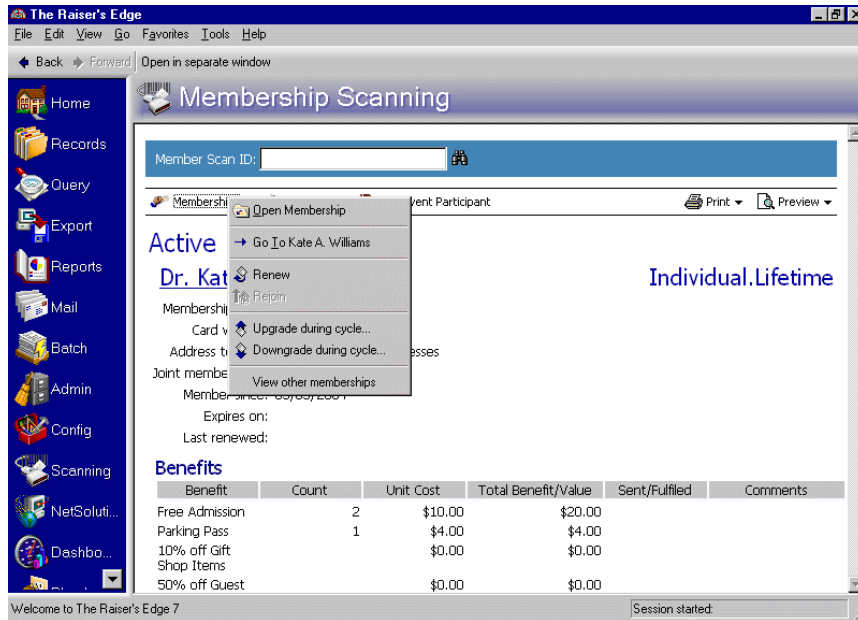
Note: Remember, a cardholder does not have to be a primary member or even present in your database. Therefore, the name printed on the card does not necessarily match the name on the constituent record that appears. If the name on the membership card is that of a cardholder or joint member, the constituent record for the primary member appears.

4. From the menu, select **Go To**. The constituent record for the primary member associated with the scanned card appears.
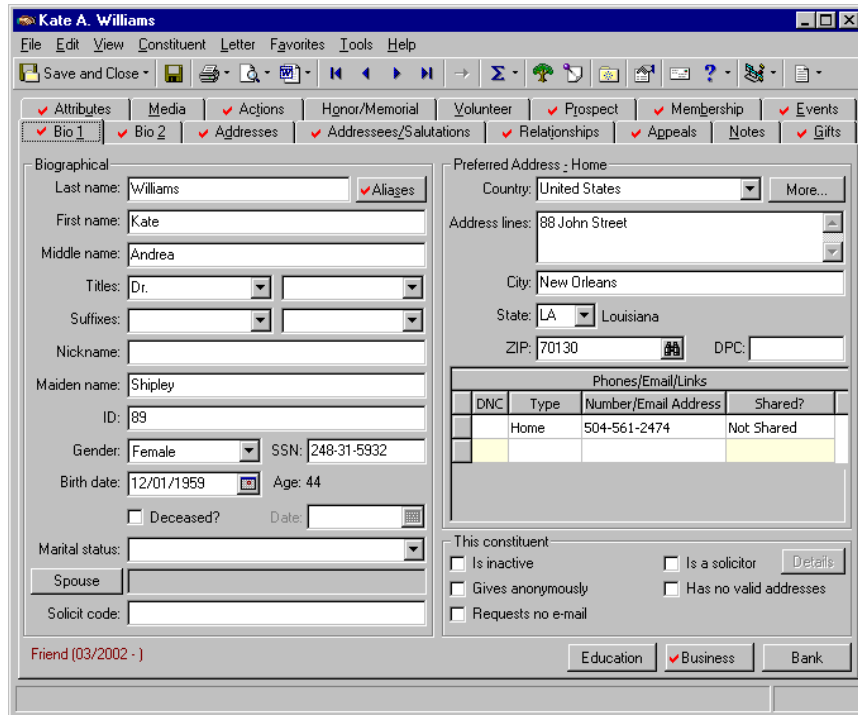
5. View information or make changes as necessary. To return to the Membership Scanning page, click **Save and Close** on the toolbar.

Advanced Processes of Membership Scanning

Note: *Membership Scanning* is additional functionality with the optional module *Membership Management*.

After you become familiar with the basic processes of *Membership Scanning*, advanced functions are much easier to use. You can optimize time and simplify member data entry by taking advantage of these processes. For example, as you scan a member's card, you can renew, upgrade, or even add a new member directly from the Membership Scanning page.

Actions and participants (when you use the optional module *Event Management*) can be added in *Membership Scanning*. In User Options, you customize your personal preference and select to add these automatically or prompt you each time you scan a card.

Changing Membership Status After Scanning a Card

Note: All membership security settings you established in *Administration* apply to *Membership Scanning*. For example, if a user does not have rights to update memberships from a constituent or membership record, they cannot renew a membership from *Membership Scanning* either. For more information about security, see the Security chapter in the *Configuration & Security Guide*.

Once you scan a card, you can Renew, Rejoin, Upgrade, or Downgrade a membership from the Membership Scanning page. You can easily access these options by clicking **Memberships** on the Membership Scanning action bar.

From the menu that appears, you can choose to Renew, Upgrade, or Downgrade a membership. For example, when you select **Renew** from the menu, the Renew Membership screen appears.

Note: This procedure demonstrates specifically how to renew a membership. If you are rejoining, upgrading, or downgrading a membership, select those options from the menu that appears when you click **Memberships** on the Membership Scanning action bar. Then, make the appropriate changes when the Upgrade, Downgrade, or Rejoin screen appears. For more information about changing membership status, see the *Membership Data Entry Guide*.

‣ **Renewing a membership from Membership Scanning**

> ***Scenario:*** Mrs. Lorrel May Justin has a membership in the Young Explorers program at your Aquarium. It has lapsed since 03/09/2001. You scan her card for entrance to the aquarium on 08/14/2006 and ask her if she would like to renew the membership, which she does. Scan in Mrs. Justin's card and renew her membership from the Membership Scanning page.

1. On the Raiser's Edge bar, click **Scanning**. The Membership Scanning page appears.
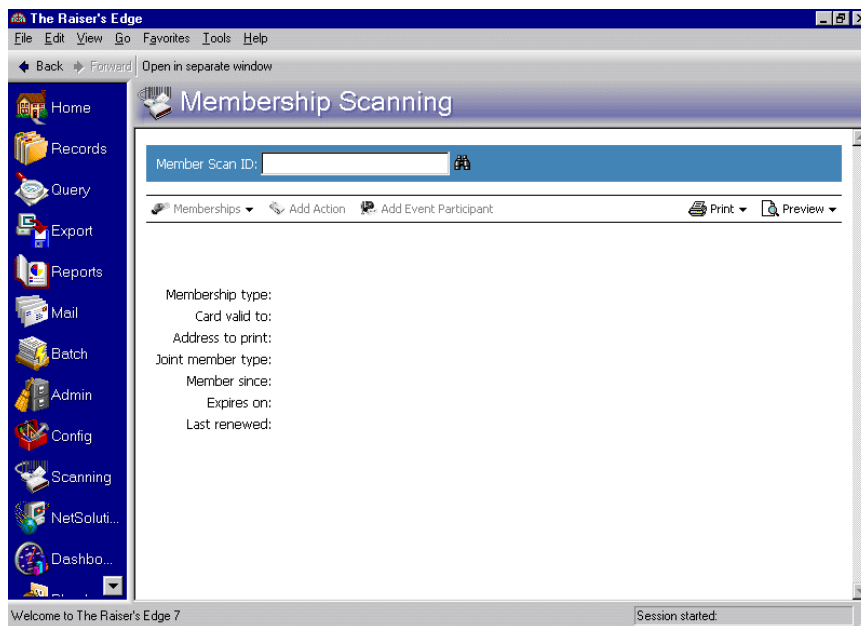
2. Scan in Mrs. Justin's card. Her membership information appears on the screen. For more information about scanning a card, see "Scanning Membership Cards" on page 40.
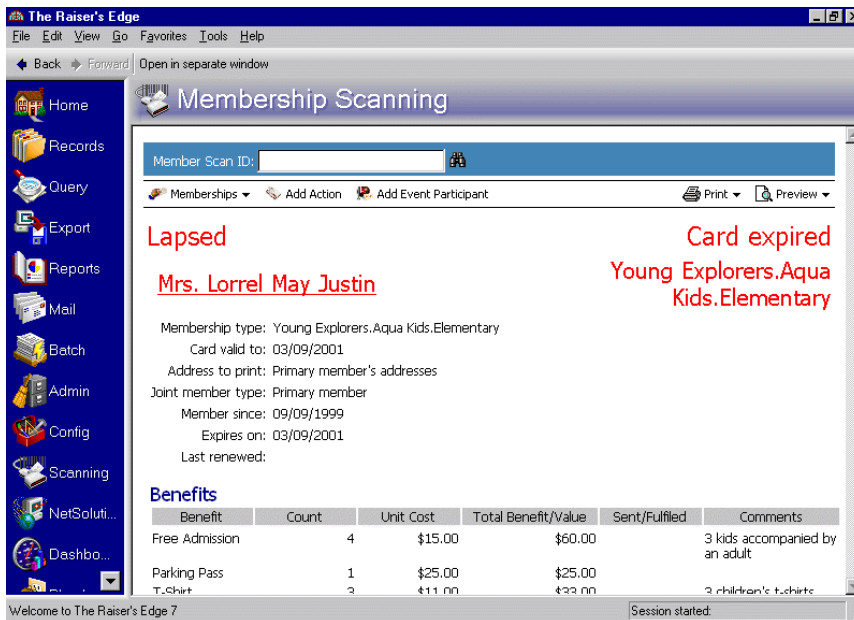
Notice that the status of her membership in the top left of the screen is Lapsed. The membership card has also expired. The **Card valid to** date displays on the Membership Scanning page.

3. On the action bar, click **Memberships**. A menu appears.
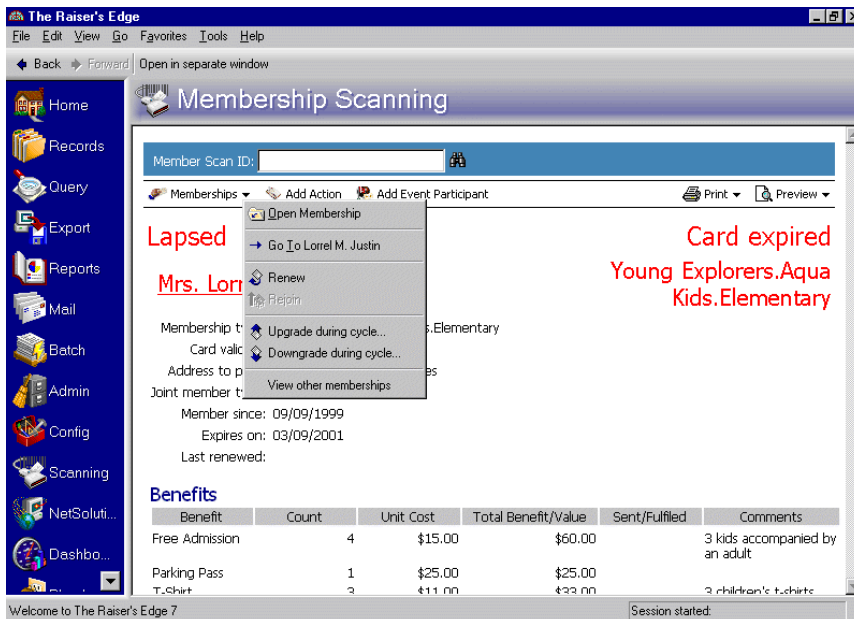
Note: You receive this message if you mark the **Warn if the membership has been lapsed for** checkbox on the Business Rules page in *Configuration*. For more information about business rules, see the Configuration chapter of the *Configuration & Security Guide*.

4. From the menu, select **Renew**. A message appears informing you of how long the membership record has been lapsed.

5. Click **OK**. The Renew Membership screen appears.

6. Because Mrs. Justin decides to upgrade from the Aqua Kids **Category** to Young Benefactor, in the **This renewal is a[n]** field, select the **Upgrade** option.

7. In the **Dues** field, enter the amount $500. This is the amount of dues for the Young Benefactor category.

Note: For more information about the fields in a membership record, see the *Membership Data Entry Guide*.

8. In the **Program** field, select "Young Explorers".

9. In the **Category** field, select "Young Benefactor".

10. In the **Subcategory** field, select "Elementary".

11. In the **Renewed on** field, click the calendar and select the date 08/14/2006.

12. In the **Expires** field, enter 08/14/2007.

13. To print renewal notices when the membership is close to expiring, mark the **Print renewal notices** checkbox.

14. In the **Reason** field, select a reason for the upgrade renewal.

15. In the **Comments** field, enter comments about the renewal.

Note: This procedure demonstrates specifically how to renew a membership. If you are rejoining, upgrading, or downgrading a membership, select those options from the menu that appears when you click **Memberships** on the Membership Scanning page. Then, make the appropriate changes when the Upgrade, Downgrade, or Rejoin screen appears. For more information about changing membership status, see the *Membership Data Entry Guide*.

16. Click **OK**. A message appears, asking if you want to add a gift for the membership renewal.

You receive this message if you select the **Prompt to add a gift for that membership** in the **For membership categories with gift defaults established** frame on the Business Rules page in *Configuration*. For more information about business rules, see the Configuration chapter of the *Configuration & Security Guide*.

17. Because Mrs. Justin writes you a check at the ticketing counter for her membership dues, click **Yes**. The Gift screen appears.

18. Enter the appropriate gift information. For more information about entering gifts for membership dues, see the *Membership Gifts Guide*.

19. To save and close the gift record, click **Save and Close on the toolbar. Th**e Amount to Apply to Membership screen appears.

20. Because Mrs. Justin wants to apply the full amount of $500 to her renewal membership, click **OK**. The Renew Membership screen appears.

21. To save the information and return to the Membership Scanning page, click **OK**.

Notice the **Dues** and **Program** fields on the membership record have been updated, along with the status of the record in the top right corner.

Adding a New Membership From Membership Scanning

Sometimes it may be necessary to add a new membership to your database from your scanning station. For example, a person may donate regularly to your organization and exist in your database as a constituent, but is not an actual member.

▶ **Adding a new membership from Membership Scanning**

> *Scenario:* A local company, Bottling Unlimited, supports recycling in your community and has given your Environmental Conservation group several large donations. It is also a matching gift company in your database. However, Bottling Unlimited does not hold a membership with your organization. When the company vice president arrives at your Earth Day Fair, you suggest he open a membership. You tell him you can create one for him right there at the ticket booth. He agrees to join at the Corporate level and wants five membership cards printed for the company. That way, employees can sign cards out and use them for events you sponsor, like the monthly bird watching tours. Create a membership record for Bottling Unlimited from the Membership Scanning page.

1. On the Raiser's Edge bar, click **Scanning**. The Membership Scanning page appears.
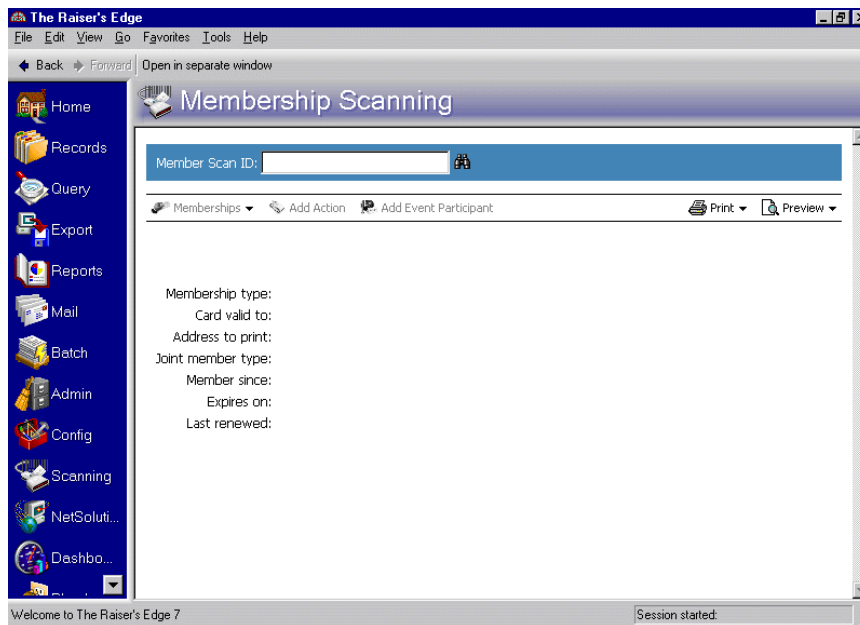
2. In the **Member Scan ID** field, click the binoculars. The Open screen for memberships appears.

3. To search to make sure the company does not already have a membership in your database, in the **Last/Org name** field, enter "Bottling Unlimited".

4. Click **Find Now**. The search turns up no results in the grid at the top of the Open screen. Click **Add New** to add a new membership record. The New Membership screen appears.

5. In the **Constituent** field, click the binoculars to search for Bottling Unlimited's constituent record. The Open screen for constituents appears.

6. In the **Last/Org name** field, enter "Bottling Unlimited" and click **Find Now**. The search results appear in the grid at the top of the screen. For more information about searching the Open screen, see the Program Basics chapter of the *Program Basics Guide*.

7. In the grid, highlight "Bottling Unlimited" and click **Open**. You return to the New Membership screen.

Note: To ensure data entry consistency, we recommend you establish preferences to automatically generate ID numbers in *Configuration*. For more information about generating membership IDs, see the Membership Business Rules section of the *Membership Data Entry Guide*.

8. In the **Membership ID** field, enter a membership ID number for the new membership. For this example, enter "9839464".

9. In the **Dues** field, enter the amount of dues for the level of membership you are creating. For this example, Bottling Unlimited's vice president requested the Corporate level, for which dues are $500. Enter the amount $500.

10. In the **Program** field, select "Business Level".

11. In the **Category** field, select "Corporate".

12. In the **Date joined** field, enter the date 04/22/2006.

13. In the **Expires** field, enter the date 04/22/2007 because the Business Level/Corporate membership is a one-year membership. For information about setting expiration dates for memberships, see the Configuration chapter of the *Configuration & Security Guide*.

Note: For more information about the fields in a membership record, see the *Membership Data Entry Guide*.

14. In the **Reason** field, select "Interested in supporting the program".

15. In the **Comment[s]** field, enter "Established by VP at Earth Day Fair."

16. Click **Members & Cards**. The Other Members and Card Information screen appears.

17. Highlight Bottling Unlimited in the grid and click **Open** on the action bar. The Primary Member's Card Information screen appears.

18. In the **Number to print** field, enter "5", because that is the amount of membership cards the Vice President requested. For information about printing membership cards from this module, see the section "Printing Membership Cards from Membership Scanning" on page 43.

19. Click **Save and Close** on the toolbar. You return to the Other Members and Cards screen. The **No**. column is adjusted for the number of cards to print.

20. Click **OK**. You return to the New Membership screen.

21. Select the Attributes/Notes tab.

22. In the **Category** column, select "Purchase Location".

23. In the **Description** column, enter "Earth Day Fair ticket booth".

24. In the **Date** column, enter the date 04/22/2006.

25. In the **Comments** column, enter, "From Membership Scanning".
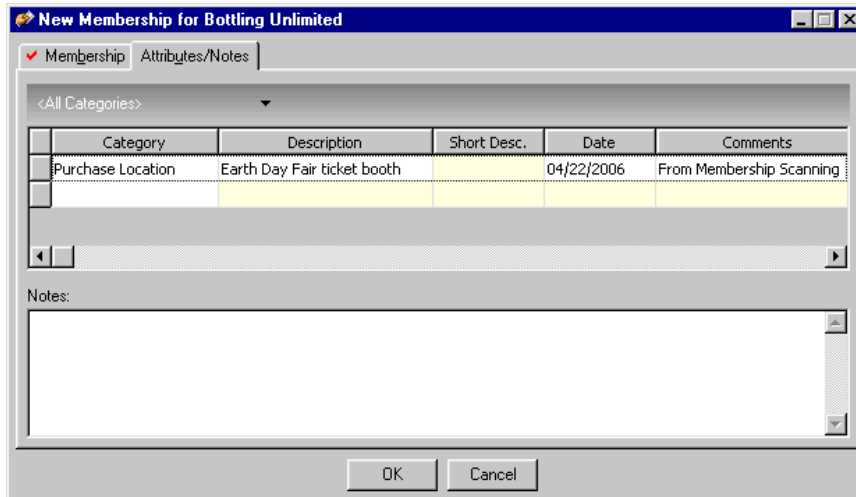
26. Click **OK**. A message appears stating your membership record has been saved.
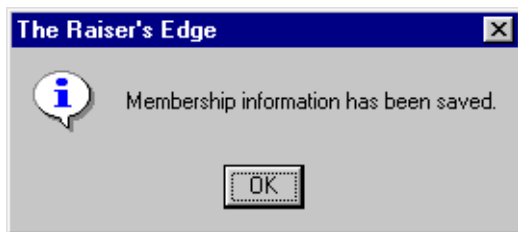
27. Click **OK**. You return to the Membership Scanning page. Bottling Unlimited's membership information data displays.
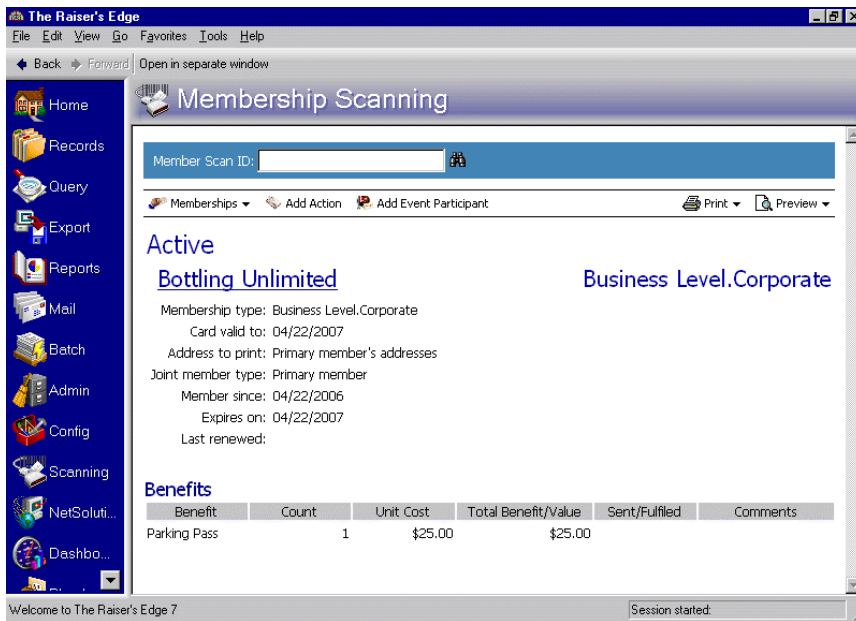
Viewing Other Memberships from Membership Scanning

After you scan a member's card, you can view other membership information for that member. If the card you scan is that of a cardholder, the other membership information available is for the primary member on the membership.

When you scan a card, you can easily access the selection to **View other memberships** from the Membership Scanning page by clicking **Memberships** on the action bar.

▶ **Viewing another membership once a card has been scanned**

1. On the Raiser's Edge bar, click **Scanning**. The Membership Scanning page appears.
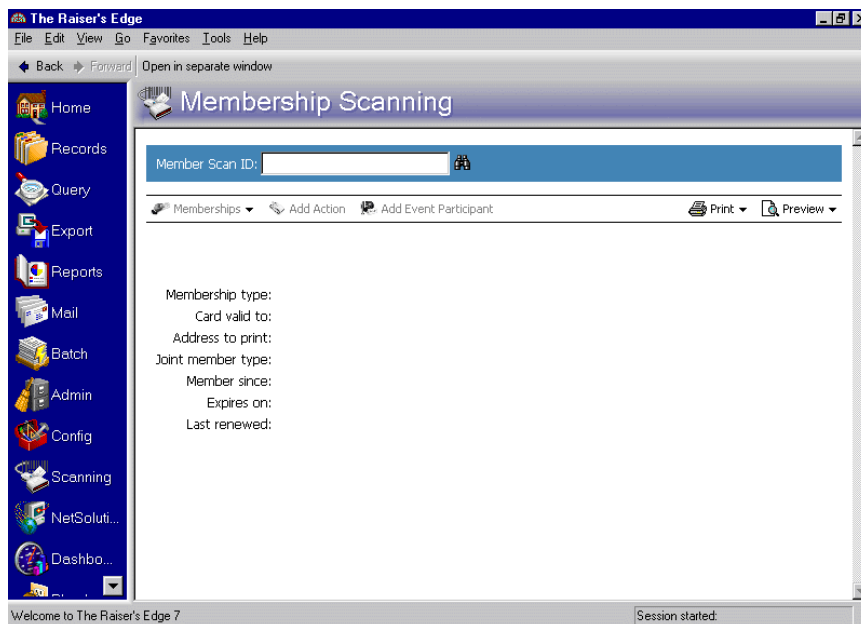
2. Scan in the membership card in the **Member Scan ID** field. The member's information automatically displays. For more information the **Member Scan ID** field, see "Scanning Membership Cards" on page 40.
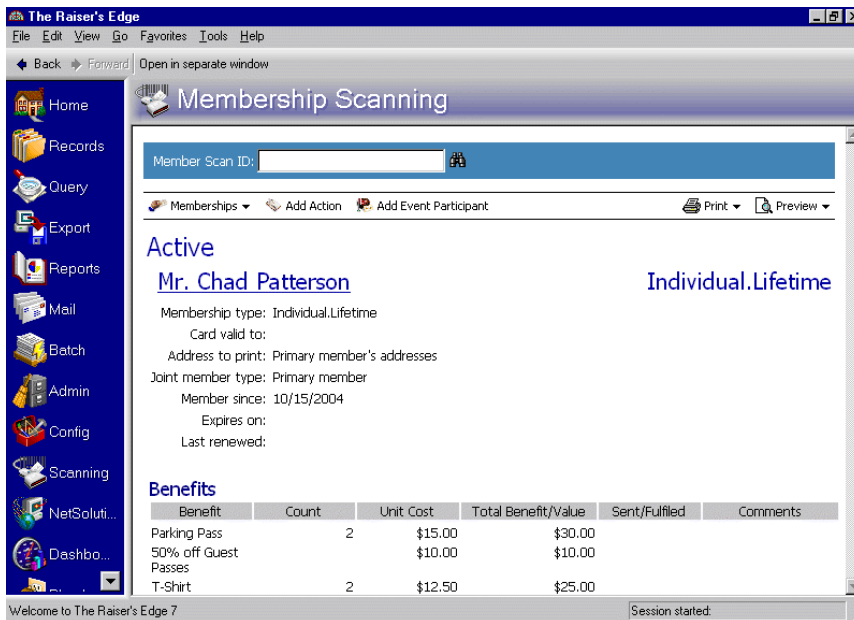
3. On the action bar, click **Memberships**. A menu appears.
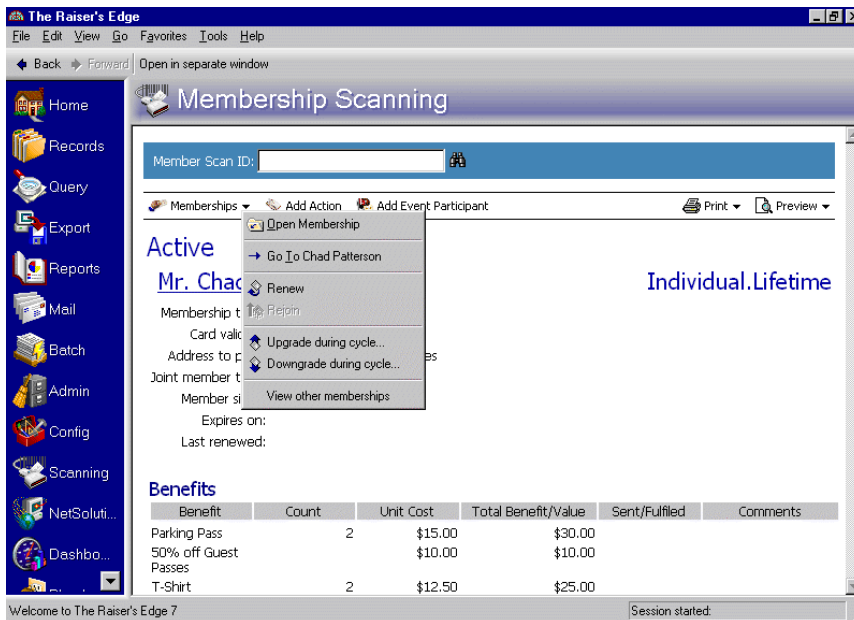
Note: The Other Memberships screen is view-only. You cannot make changes from this screen.

4. Select **View other memberships**.The Other Memberships screen appears.

5. To view all other memberships for the member whose card you scanned, select **All** in the tree view on the left. The other memberships appear in the grid on the right.
6. To view the other memberships for which he is a primary member, active member, and a lapsed or dropped member, select **Primary**, **Active**, and **Lapsed/Dropped** in the tree view on the left, respectively.
7. Click **Close**. You return to the Membership Scanning page.

Correcting a Cardholder's Address from the Membership Scanning Page

Once a membership card is scanned, you can correct the member's addresses from the **Addresses** grid. In User Options, if you select to display the **Addresses** grid at the bottom of the Membership Scanning page, you can double-click an address in the grid to access and make changes to it. You can also highlight the addresses in the grid and click **Open Address** at the top of the **Addresses** grid. For more information about setting up your display options, see "User Options" on page 13.

> **Note:** All membership security settings you established in *Administration* apply to *Membership Scanning*. For example, if a user does not have rights to update an address from a constituent record, they cannot update an address from *Membership Scanning* either. For more information about security, see the Security chapter in the *Configuration & Security Guide*.

To add a new address, click **New Address**. To delete an old address, highlight the address in the **Addresses** grid, and click **Delete Address**.

Even if you do not select to display addresses on the Membership Scanning page in User Options, you can still edit the addresses of the primary member by opening the constituent record from **Memberships** on the action bar. For more information about opening a constituent record from the Membership Scanning page, see the section "Accessing Records From Membership Scanning" on page 50.

If a non-constituent cardholder is a joint member, the **Addresses** grid displays the cardholder's address. You originally entered this address on the cardholder's relationship record, accessed from the Relationships tab of the primary member's constituent record. To correct primary and joint members' addresses, follow the steps in the next procedure.

▸ **Correcting an address from Membership Scanning**

> *Scenario:* Mr. Chad Patterson, a member of your hospital board, is attending the annual fundraiser ball. When you scan his card for admittance to the ball, he tells you he has recently moved. After scanning, update Mr. Patterson's address from the **Addresses** grid on the Membership Scanning page.

1. On the Raiser's Edge bar, click **Scanning**. The Membership Scanning page appears.

2. Scan in Mr. Patterson's membership card. His membership information appears on the page. For more information, see "Scanning Membership Cards" on page 40.
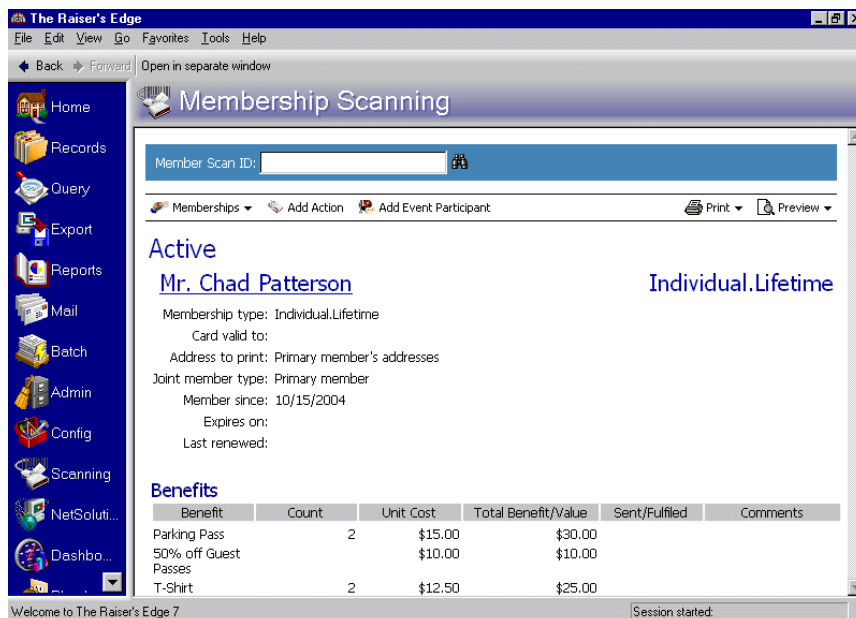
Note: You may need to scroll down to view the **Addresses** grid at the bottom of the Membership Scanning page.

If you mark the **Show address information** checkbox for **Display Options** on the Membership Scanning tab in User Options, the **Addresses** grid appears at the bottom of the page. For more information about establishing display options, see "User Options" on page 13.
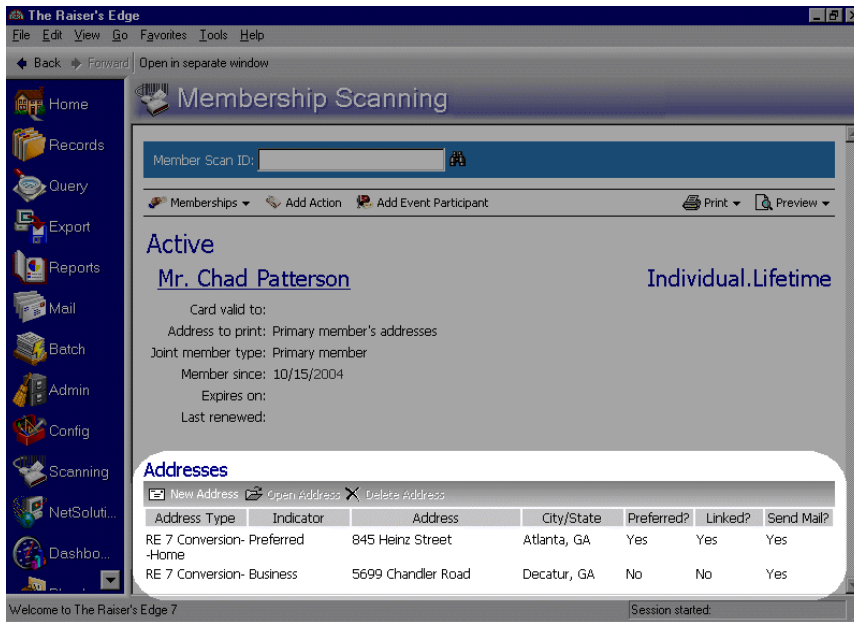
Note: You can change the order of the columns in the **Benefits** and **Addresses** grids by placing your cursor over a column heading. Click your mouse and drag the column heading to the appropriate place.

3. In the **Addresses** grid, highlight the row for the address you want to update. Click **Open Address** on the action bar at the top of the **Addresses** grid. The Address screen appears.
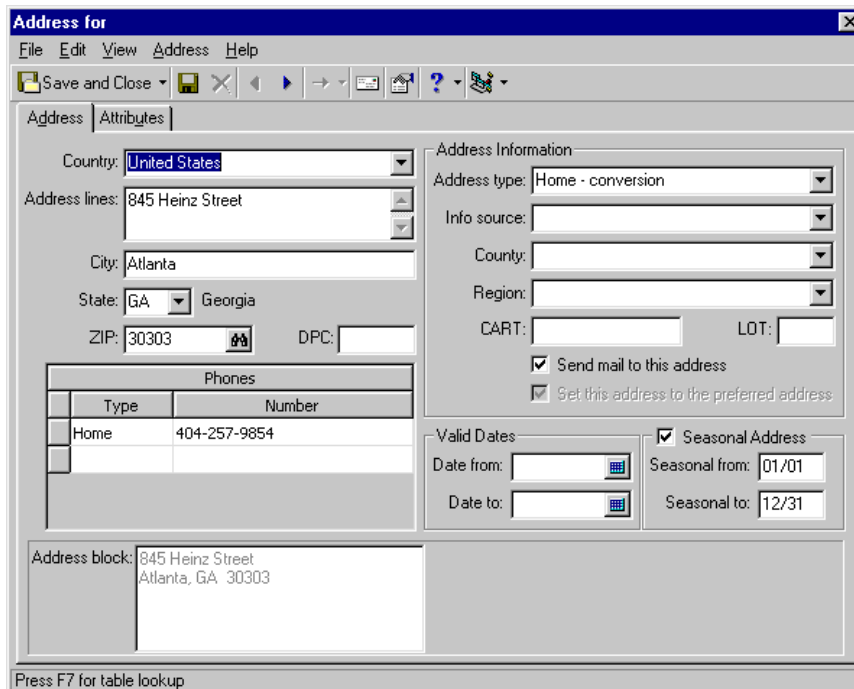
4. To store Mr. Patterson's old address information, select **Copy Preferred Address to Alternate** from the **Address** menu bar. A message appears asking if you want to update all linked addresses to the new Preferred Address.

5. Click **OK** to update the linked records. The Address for screen appears.

6. In the **Address lines** box, enter Mr. Patterson's new address, "65 Ponce De Leon Place".

Note: For more information about editing addresses, see the Constituent Mailing Information chapter of the *Constituent Data Entry Guide*.

7. In the **Info source** field, select "Event Attendee".

8. In the **County** field, select "Cobb".

9. In the **Region** field, select "Southeast".

10. To save the address changes and close the address record, click **Save and Close** on the toolbar. If the address is linked to other records, a message appears letting you know the address is shared.
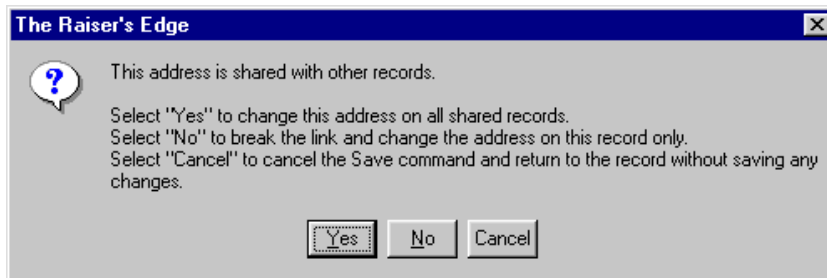
Note: Click **No** to break the link and only update this address record or **Cancel** to cancel the save and return to the address record. For more information about addresses, see the Constituent Mailing Information chapter of the *Constituent Data Entry Guide*.

11. To update all of Chad's shared addresses, click **Yes**. You return to the Membership Scanning page.
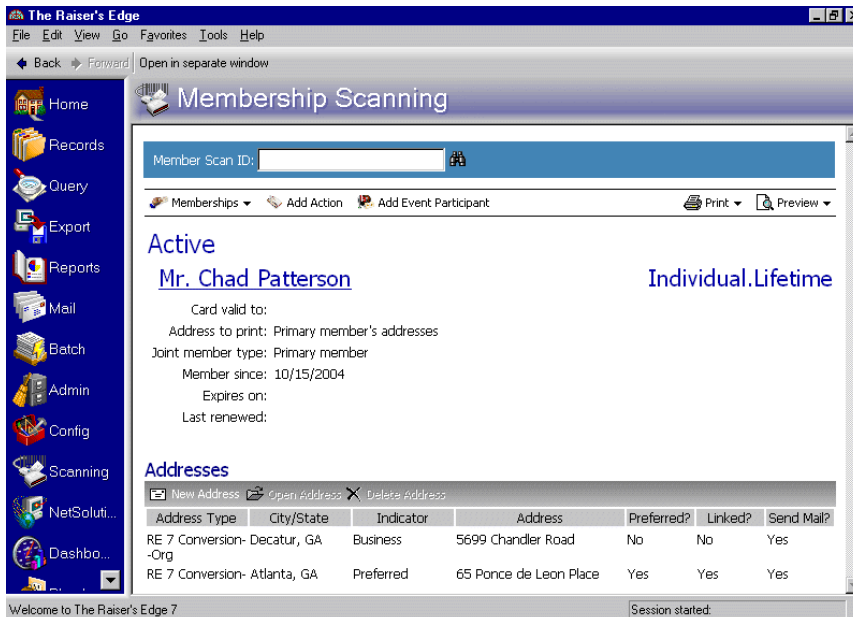
The updated address information appears in the **Addresses** grid.

Adding Actions from Membership Scanning

You can add an action to a constituent record from the Membership Scanning page after you scan a card. You can do this in one of three ways. You can manually add the action by clicking **Add Action** on the Membership Scanning action bar, select to have the program ask you to add an action each time a card is scanned, or automatically add a default action when you scan a membership card.

Add actions manually when you need to add just one (or several) action record(s) for a member whose card you just scanned. For example, a board member comes to your zoo today to attend a seminar on endangered species. In this situation, it is best to manually add an action record using the **Add Action** link on the action bar of the Membership Scanning page for this one person. You can add the action for your Director of Membership, suggesting he call the board member to thank her for attending the seminar.

It is best to select to view the prompt message or automatically add action records in User Options for multiple action records you are expecting to add. For example, if you plan to add an action for every membership card you scan to track attendance. For more information about adding action records using User Options, see "Setting Default Actions for Membership Scanning" on page 20.

Adding an Action from the Membership Scanning Page

Note: For more information about actions, see the Actions chapter of the *Constituent Data Entry Guide*.

Once you scan the membership card, you can manually add an action to the constituent record by clicking **Add Actions** on the Membership Scanning action bar.

▶ **Adding an action using the Add Actions link**

Scenario: Ms. Lucy Avdeenko is a Lifetime member at your museum. On 04/10/2005, you scan her card for entrance to the Alfred Stieglitz photography exhibit. Because she attends this exhibit and is interested in black and white photography, you want to include her in a future mailing, inviting members to the opening of an upcoming Ansel Adams exhibit. After you scan her membership card, add an action from the Membership Scanning page to include Ms. Avdeenko in the mailing.

1. On the Raiser's Edge bar, click **Scanning**. The Membership Scanning page appears.
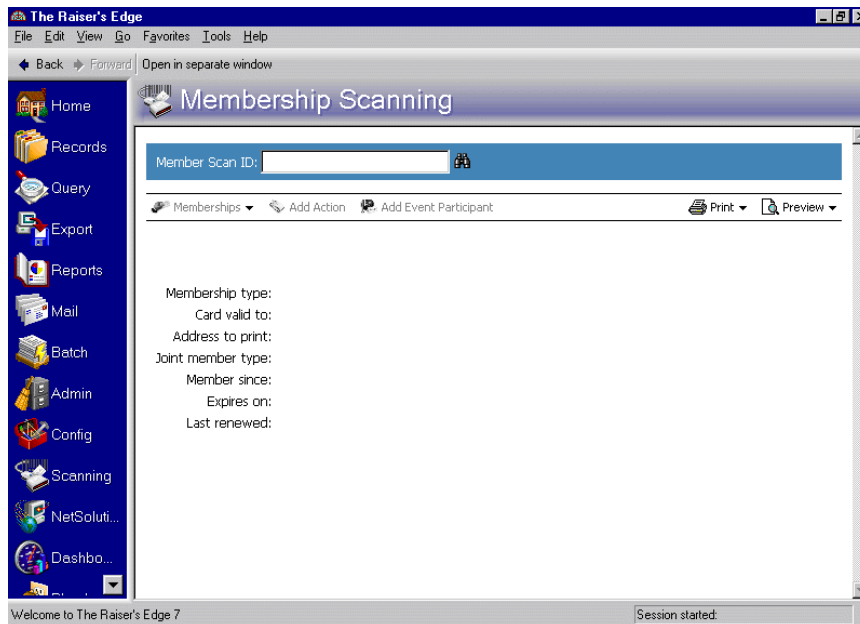
2. Scan in Ms. Avdeenko's membership card. For more information, see "Scanning Membership Cards" on page 40.
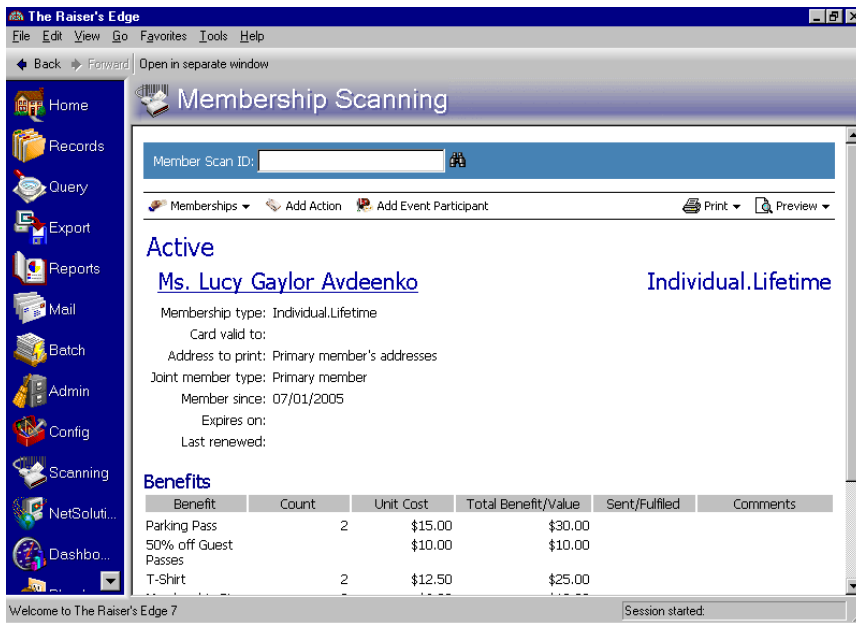
Note: This scenario uses the **Default Actions** User Options defaults. These selections are **Do not add an action** and **Use scan date**.

3. On the action bar, click **Add Action**. The New Action screen appears.
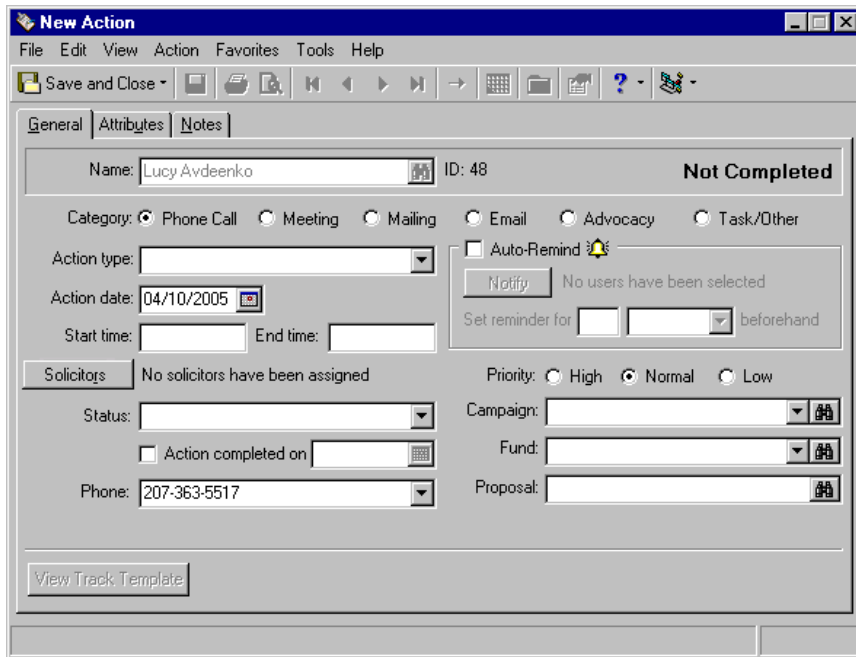
4. Enter appropriate information in the fields and make selections on the action record. For more information adding about action records, see the Actions chapter of the *Constituent Data Entry Guide*.

5. When you finish, click **Save and Close** on the toolbar to save and close the new action record. You return to the Membership Scanning page.
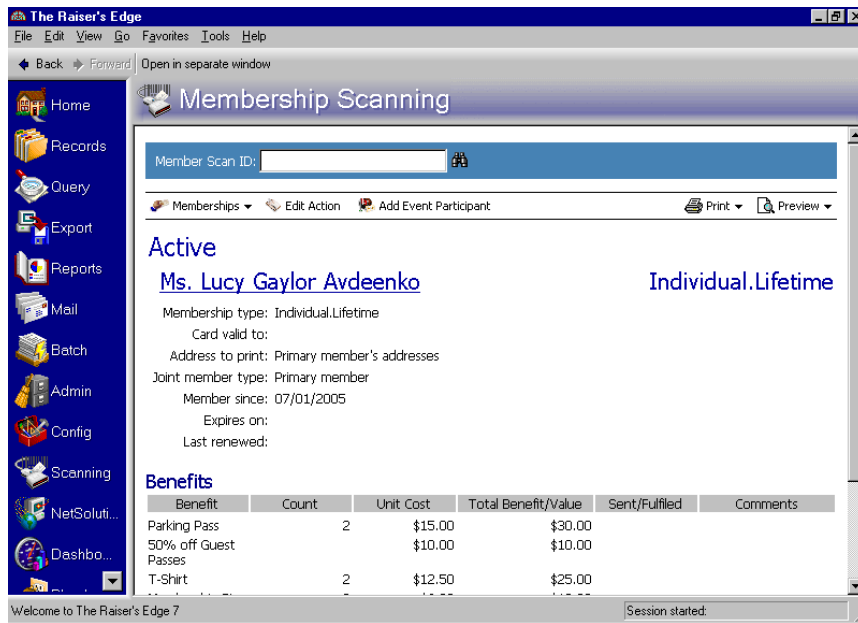
Adding Participants from Membership Scanning

When you use the optional module *Event Management*, you can add an event participant from the Membership Scanning page after you scan a membership card. You can do this in one of three ways. You can manually add the participant record by clicking **Add Event Participant** on the Membership Scanning action bar, select to have the program ask you to add a participant record each time a card is scanned, or automatically add a default participant record when you scan a membership card.

Add participants manually when you need to add just one (or several) participant record(s) for a member whose card you just scanned. For example, Benefactor members are invited to attend an exclusive pre-opening party for your latest art exhibit. Beth Richardson, a Benefactor member and a volunteer, comes to the museum today to volunteer and informs you she is planning to attend the pre-opening party. In this situation, it is best to manually add a participant record by clicking **Add Event Participant** on the action bar of the Membership Scanning page for this one person.

It is best to select to view the prompt message or automatically add participant records in User Options for multiple participant records you are expecting to add. For example, if every member coming through your line plans to attend a luncheon, you want to add a participant record for every card you scan. For more information about adding participant records using User Options, see "Setting Default Participants for Membership Scanning" on page 28.

Adding a Participant to an Event from the Membership Scanning Page

You can manually add a participant by clicking **Add Event Participant** on the Membership Scanning action bar, once you scan the card.

▶ **Adding a participant to an event from the Membership Scanning page**

Scenario: Miss Jill Ashton attends your Youth Development Group's Build the Playground benefit gala. Jill is a joint member on the membership of her mother, Mrs. Elizabeth Anne Ashton. Jill wants to register for the Playground Grand Opening event next spring. After you scan Jill's card at the gala, add a participant record for her from the Membership Scanning page.

Note: This scenario uses the **Default Participants** User Options defaults. These selections are **Do not add a participant** and **Make the primary member the participant**.

1. On the Raiser's Edge bar, click **Scanning**. The Membership Scanning page appears.
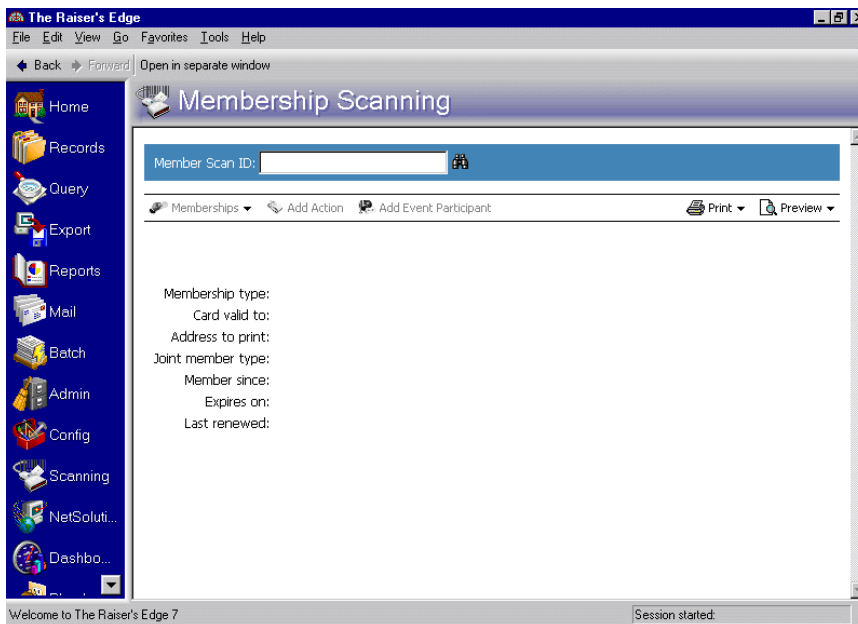
2. Scan in Miss Jill Ashton's membership card. Jill's membership data displays on the Membership Scanning page.
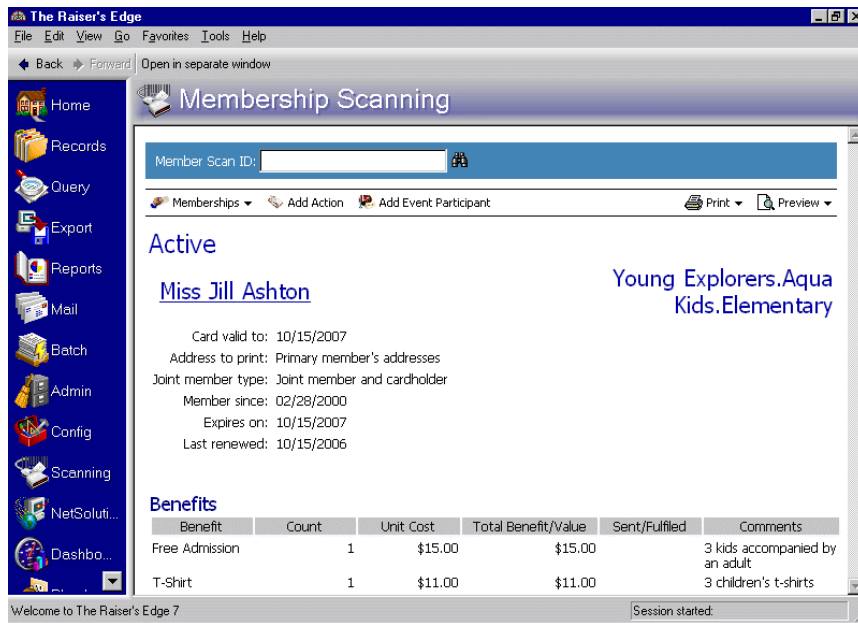
Note: If you mark the **Add event participants for cards scanned** checkbox in User Options and select **Prompt to add participants**, the same message automatically appears when you scan the card, without clicking **Add Event Participant** on the Membership Scanning action bar.

3. On the action bar, click **Add Event Participant**. The Open screen for events appears.
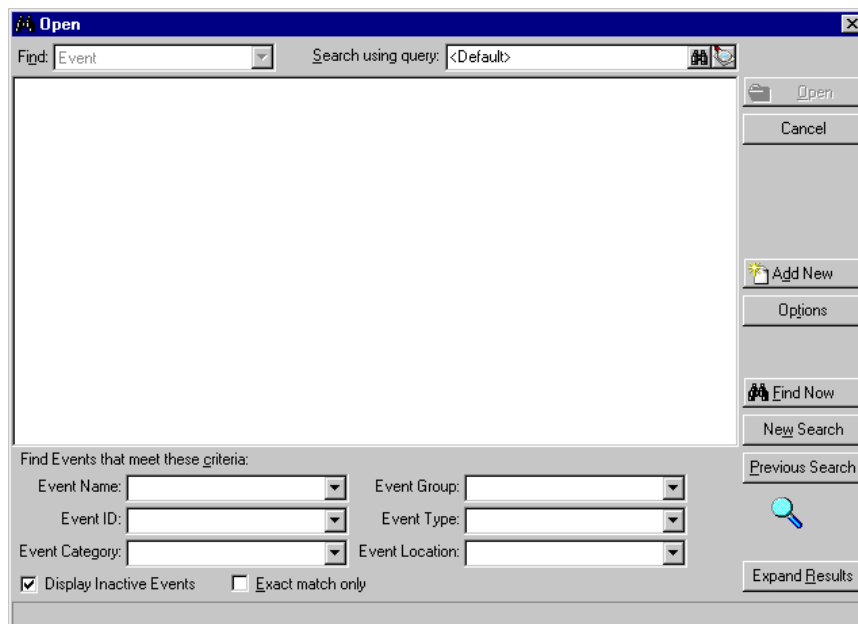
The Open screen does not appear if you specify an event in the **Event to Use field** on the Membership Scanning tab in User Options. For more information, see "Setting Default Participants for Membership Scanning" on page 28.

Note: Participants do not have to be constituents in your database. Therefore, the primary member's participant record displays.

4. Search for the Playground Opening event and select **Open**. The participant record for the primary member displays. For more information about opening records, see the Program Basics chapter of the *Program Basics Guide*.

5. Enter the participant information you want. For more information about adding participant records, see the *Event Management Data Entry Guide*.

6. To save the participant record and return to the Membership Scanning page, click **Save and Close** on the toolbar. Jill is now registered for the Playground Opening event.

Using Customizations in Membership Scanning

Note: The optional module *VBA for Advanced Customization* enables you to customize **The Raiser's Edge** to meet your specific needs. When you purchase an optional module, you are given a code. You must enter this code to "unlock" or activate the optional module. For more information, see the *Program Basics Guide*.

When you have the optional module *VBA for Advanced Customization*, you can customize **The Raiser's Edge** without boundaries. Visual Basic for Applications (VBA) enables you to "tweak" **The Raiser's Edge** to mirror your organization's processing and procedural needs. VBA is developmental technology for customizing applications and integrating them with existing data and systems. For example, you can integrate **The Raiser's Edge** with Microsoft *Excel*'s chart functions to create custom views of your **Raiser's Edge** data.

If you have in-house staff with VBA knowledge, custom solutions for your organization are limitless. You can create custom business rules, design custom screens, automate sophisticated segment mail processes, create links to custom reports, print membership cards with photo IDs, and much more. The optional module *VBA* helps you simplify your work and increases the effectiveness of **The Raiser's Edge**.

Note: Send an email to dssupport @blackbaud.com or call Support at 1-800-468-8996 for support assistance. Send an email to solutions@blackbaud.com or call Sales at 1-800-443-9441 for customization needs.

Training for the optional module *VBA* is not required. However, we strongly recommend training due to the complexity of VBA. As long as you have maintenance, support is available. You can receive assistance in determining how the VBA objects, methods, events, and properties work with each other and your **Raiser's Edge** software. If you do not have in-house staff with VBA knowledge, Blackbaud offers professional Software Customization services to meet your needs.

Displaying Additional Fields on the Membership Scanning Page

Using the optional module *VBA*, you can include any field in **The Raiser's Edge** (as well as fields from other programs) on the Membership Scanning page. This includes additional fields not included in the **Membership Details** box under **Display Options** in User Options for Membership Scanning.

▶ **Viewing and editing gift record information from the Membership Scanning page**

When you use the optional module *VBA* to add additional fields on the Membership Scanning page, certain fields become hyperlinks. By clicking these fields, you can open records to edit information or simply view more information on the record.

> ***Scenario:*** Dr. Alan Hayes first learned about your organization when he received a phone call during the 2007 Phonathon. He expressed an interest in donating a gift. Anne Sinclair, a solicitor at your organization, took him to lunch and also contacted him several times by telephone. This hard work paid off, and your organization received a generous gift from Dr. Hayes.
>
> Using the optional module *VBA*, your in-house VBA expert wrote the code enabling you to include the **Exhibit interest**, **Total given**, **Largest gift**, and **Solicitors** display fields on your Membership Scanning page. When you scan Dr. Hayes's membership card and view his largest gift, you realize the appeal and solicitor information has not been added to the gift record. Include the 2007 Phonathon appeal on the gift record and add Anne Sinclair as a solicitor.

1. On the Raiser's Edge bar, click **Scanning**. The Membership Scanning page appears.
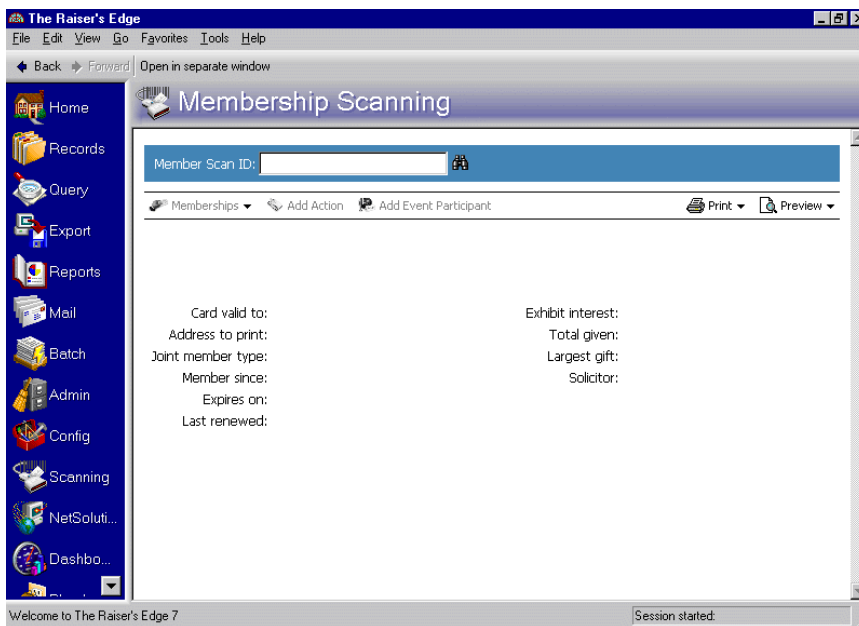
2. Scan in Dr. Hayes's card. His membership information appears on the Membership Scanning page. For more information about scanning a card, see "Scanning Membership Cards" on page 40.
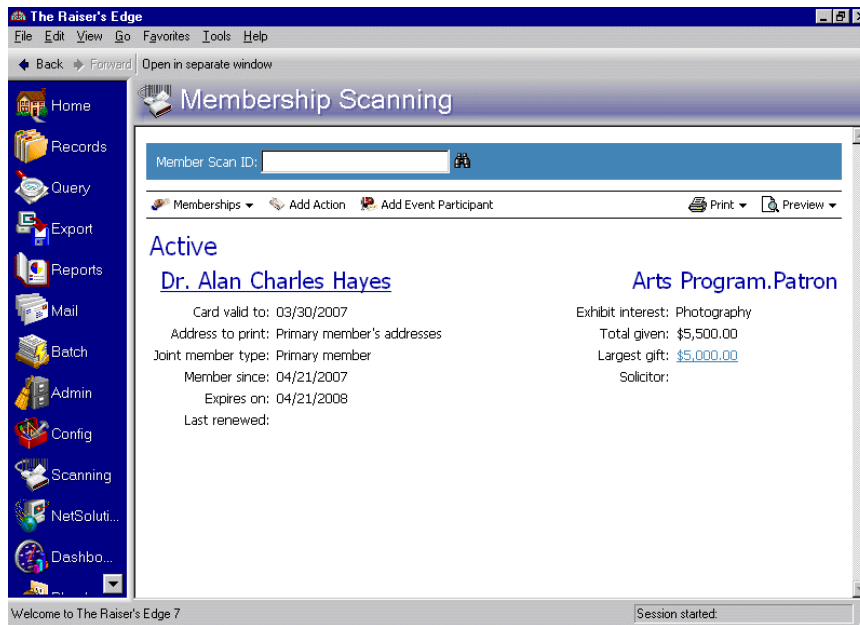

3. In the **Largest gift** display field, click **$5,000**. The gift record appears.
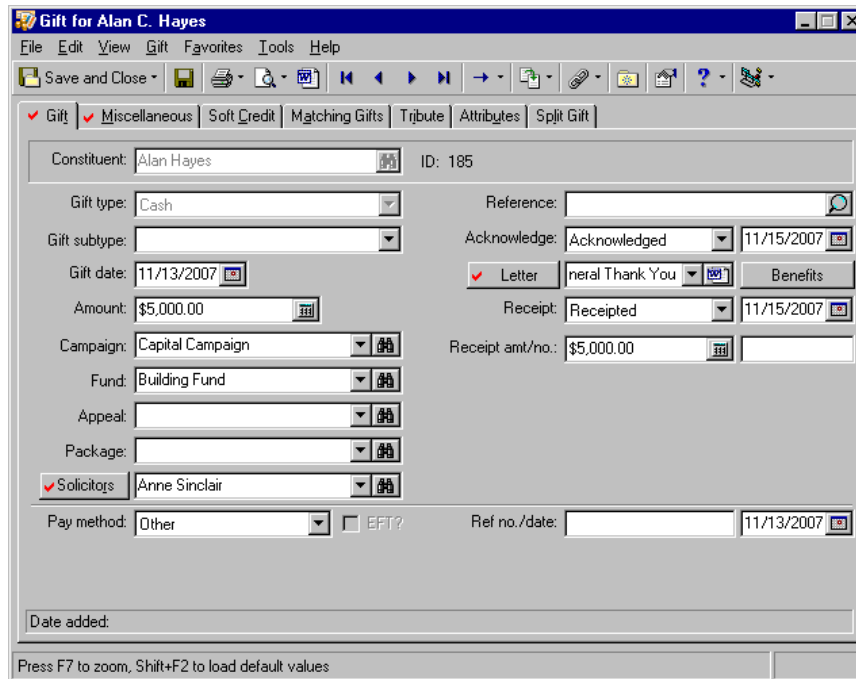
4. In the **Appeal** field, select "Internet/Web Site solicitations".

Note: For more information about editing a gift record and entering data in gift fields, see the Gift Records chapter in the *Gift Records Guide*.

5. In the **Solicitors** field, enter "Anne Sinclair".

6. To save the new information and close the gift record, click **Save and Close** on the toolbar. You return to the Membership Scanning page.

▶ **Sending an email from the Membership Scanning Page**

Using the optional module *VBA*, you can easily send an email directly from your Membership Scanning page. For example, one of your top five donor members comes to the museum today to view a new exhibit. You can create a custom link on the Membership Scanning page to automatically send an email to your Director of Development informing her the donor just arrived at the museum. This way, the Director of Development can take advantage of an opportunity to personally thank the donor for coming to view the new exhibit.

In addition, you can send automatic email using the optional module *VBA* to many other people. For example, you may want to send an email to solicitors automatically from the Membership Scanning page when one of their constituents' membership cards is scanned to let the solicitor know the member visited your organization. In the following scenario, you learn about automatically sending the member an email from *Membership Scanning*.

Scenario: Using *VBA*, your in-house VBA expert wrote code enabling you to send an email directly from the Membership Scanning page. Mary Beth Richardson just came through your line to attend today's seminar exhibit about Endangered Species. When you scan Prof. Richardson's membership card, send an email thanking her for attending.

1. On the Raiser's Edge bar, click **Scanning**. The Membership Scanning page appears.
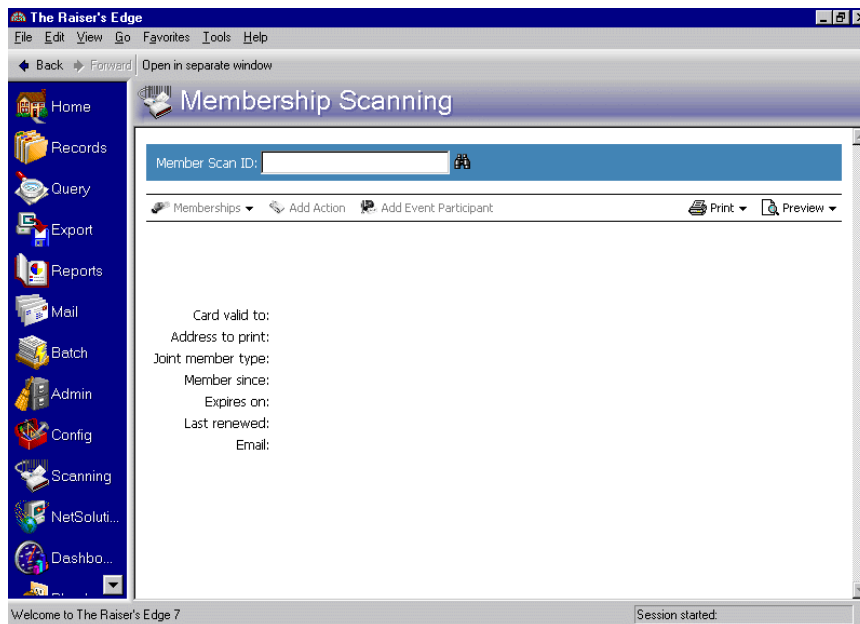
2. Scan in Prof. Richardson's card. Her membership information appears on the Membership Scanning page. For more information about scanning a card, see "Scanning Membership Cards" on page 40.
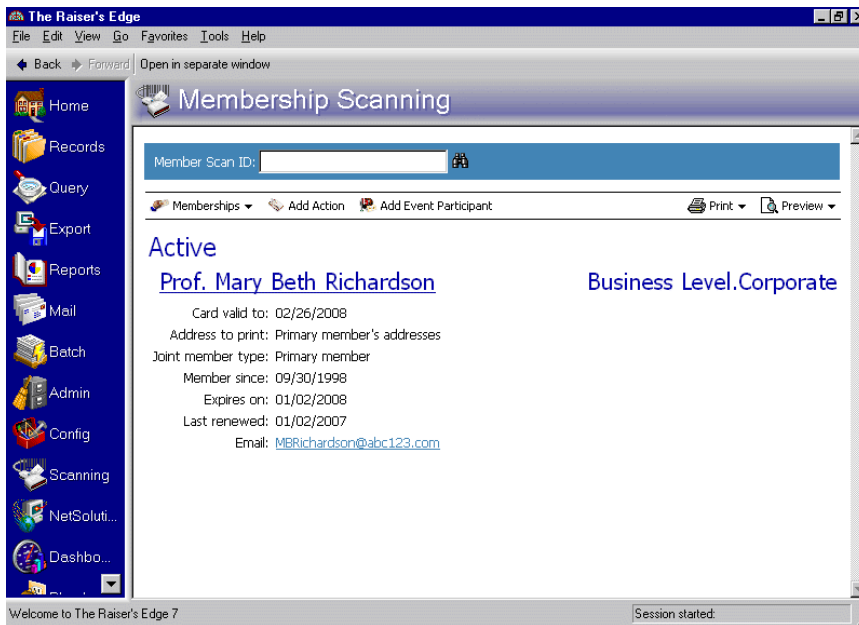
3. Click Prof. Richardson's email address. Your email program opens a new message with Prof. Richardson's email address in the **To** field.
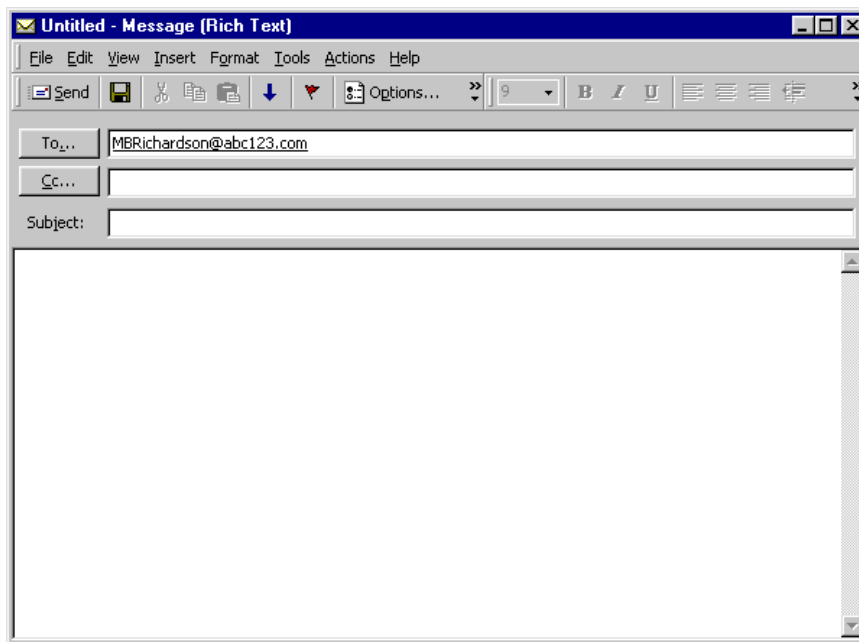
4. In the **Subject** field, enter "Endangered Species".

5. In the body of the email, enter "Thank you for today's attendance to the Endangered Species seminar. Your continuous support and interest in our zoo's programs are a valued part of our success, Prof. Richardson!".
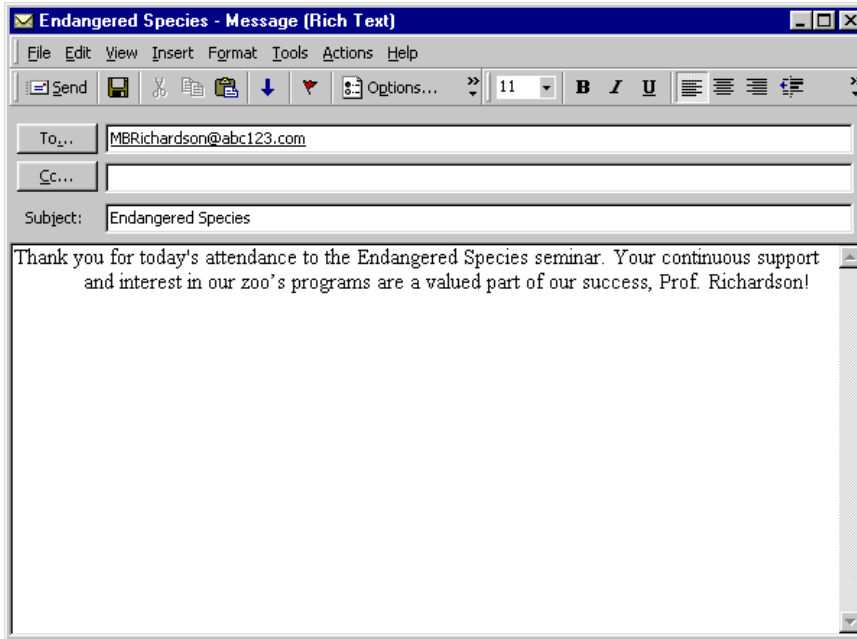
6. To send your email, click **Send**. Your return to the Membership Scanning page.

Using CardScanned to Create Custom Barcodes

Using the CardScanned event, the *VBA* developer can view the membership information scanned before **The Raiser's Edge** does. By doing this, the developer can resolve the scan ID and pass the appropriate membership and card IDs back to the program for normal processing.

For example, you can use the constituent ID for the barcode on the membership card (rather than **The Raiser's Edge** pre-defined numeric barcode format). Using the CardScanned event in *VBA*, you can write the *VBA* code to load the constituent based on constituent ID. Then, use your code to determine the member and membership card that returns to the end-user. You can write UI code for constituents with multiple memberships or multiple cards.

Using CardScanned, the *VBA* developer has full control over the possibilities of custom barcodes. Your barcode can contain as much or as little data as you want (the data must remain within **The Raiser's Edge** requirement of a 3 x 9 barcode). For example, you can use this event to support multiple barcode formats or legacy membership cards. For more information, see the *VBA Essentials Guide*.

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