

# ***Church Membership Filing System***

## **Version 2020**

Application Created

by

Tom Wacaster

of

**Church Software Plus**

**10166 Phillips Drive**

**Olive Branch, MS 38654**

**tswacaster@aol.com**

682-234-1240 (cell and texting)

# Information

Powered by Alpha Five Run Time

License issued to Computer Services for distribution  
with the "Membership File System" application.

All material contained on this program represent a considerable amount of time and expense on the part of the designer. Both the Alpha Run Time software and the "Membership 2020 Filing System" are copyright material and may not be copied or duplicated in any form. The use of this program and/or "Minister's Filing System" applications is limited to the purchaser and may be installed on only one computer at a time without permission from Computer Services. You can also install the program on one laptop owned by the same party that purchased this program. Networking in an office system is permissible and instructions for setting up a network appear at the close of this manual. In a network environment there are no limits to the number of computers on the network. The purchaser agrees to these limitations and restrictions upon purchase of this product and installation of it into his computer.

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## Installation of Alpha Five Runtime

And

## Church Membership Filing System

The "Membership File System" is powered by the Alpha Five Software system. The install program can be purchased on CD for shipping and handling of \$10. Otherwise the program install files are sent to you as a download only. When you activate the install, follow instructions on the screen. The program install will place an icon on your screen automatically.

When you first run your program you will be asked for a registration number. This number is good for 30 days: 5466971171872757. Once the 30 day free period has expired you can then purchase the program. This will be provided to the user upon payment for product. You can obtain a registration number by contacting us at above address and/or email noted on page one header. If you bought the program through a retailer you can obtain a registration number through the retailer. Send us an email providing the name, address and phone of the retailer and we will contact them regarding getting a registration number to you.

**License Code:** When you install the program, it will generate a "license code" for your application. This can be viewed at the main menu by locating and pressing the "maintenance" icon on the menu bar. Note: We strongly suggest that you **copy this license code somewhere upon installation** before the 30 free trial period expires.

Your membership/visitation database is now installed and ready for use. Go to your desktop and point and click on the icon. If you downloaded the file from the website we suggest that you put this install file in an external backup system in case you need to reinstall the program at a later date.

## Technical Support And Our Guarantee

We realize that with any program there are likely to be problems. We have tried to make this program user friendly, and provide enough instructions to help you get the most use out of the program. If you have any problems, you can reach me in the following ways:

**Home Phone:** 682-234-1240 – This may change due to the nature of my preaching and mission work. You can obtain an up to date phone number at my website: [www.churchsoftwareplus.com](http://www.churchsoftwareplus.com).

**Email Address:** My email is [tswacaster@aol.com](mailto:tswacaster@aol.com). You can usually reach me within 24 hours since I check my mail regularly. If you email me give me a brief description of your problem. I will email you back and give you a number where I can be reached, or I will call you.

### Our Guarantee

If for any reason you are not satisfied with this product, you can return it to the dealer for a full refund ***provided you have not acquired a registration number and activated your registration***. We recommend that you become acquainted with the program during the 30 day grace period and before acquiring the registration number. **Once you have obtained a registration number, a refund cannot be given.**

If you purchased the program from a dealer, contact the dealer before obtaining the registration number and a full refund will be given by the dealer. Once you register with us, the dealer will be contacted and informed that a refund is no longer possible.

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# CHAPTER ONE: MAIN MENU INSTRUCTIONS

There are five (5) major databases in the Church Membership Filing System. You can access any one of these databases at the Main Menu. The Main Menu opens when you point and click on the icon on your desk top. There are some things we need to point out regarding the Main Menu

## Menu Bar:



The “menu bar” provides you with a number of functions relative to the active screen (by “active screen” we mean the screen you are working with at any given moment). The options available on the Main Menu “menu bar” are not as extensive as other screens. But please notice the following:

“**About**”- Provides some information about the company and designer of Church Database Version 2020.

“**Maintenance**”- The “maintenance” drop down menu gives you four choices.

**Pack Databases:** This procedure removes any deleted records so that the space is utilized more effectively.

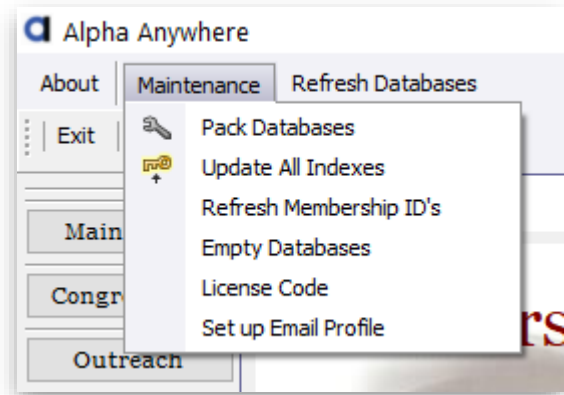
**Update All Indexes:** This restores the links between parent and child databases. If data gets skewed, return to the main menu and run this option.

**Refresh Membership ID's:** When family members have been deleted from your database, this leaves a void space in the database. In order to keep from duplicating member ID's it is strongly advised that upon deleting members and before adding new family members that you run this feature of the program

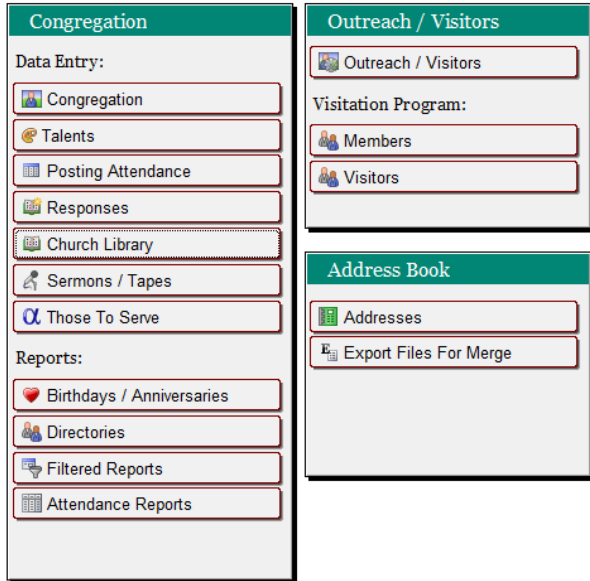
**Empty Databases:** When you have practiced on the database and are ready to begin entering records permanently, it would be best if you empty all the databases before building your permanent database.

**License Code:** NOTE: It is essential upon installation that you copy this code before the 30 day free trial period expires and keep in a safe place for later reference.

**Set up Email Profile:** You can set up an email profile if you plan to use the programs email feature. Most of my customers chose to remain with their own email program. I'll discuss this later.



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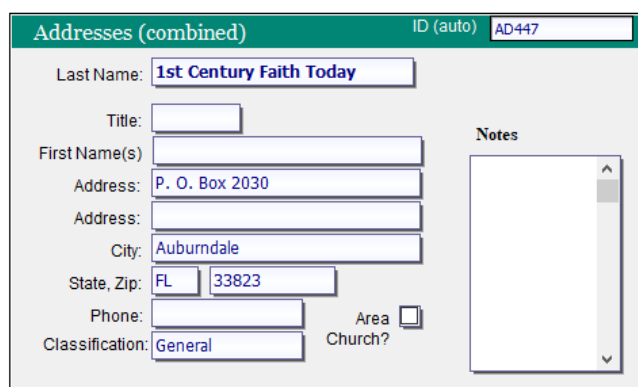
**Navigation To Different Databases:** There are two ways you can open the main databases. The first is by using the “**Navigation Menu**” at the left of the screen (see illustration above). The five major databases are (1) Congregation, (2) Outreach, (3) Addresses, (4) Church Library, and (4) Sermon Library. The second way is by pointing and clicking on these same database choices on the “Screens” portion of the Main Menu. You will notice there are other buttons on the main menu screen, and we will discuss these as we get to them.

At this point let me remind you to copy your LICENSE CODE and send it to me, or print it out, as soon as you install and open the program. The database will lock up after 30 days and if you have not obtained the permanent REGISTRATION / LICENSE CODE by that time you could possibly lose all your data. Point and click on “License Code” in the Maintenance drop down box and copy and email us the code that will be used later to generate and send you a registration number to permanently unlock your program after purchase.

## CHAPTER TWO: ADDRESSES DATABASE

The “Address” database is used for entering names and addresses of individuals, congregations, businesses, etc. that are **NOT** members of the congregation or “visitors” to your services. In addition, **when you “refresh” the databases at the main menu**, it imports and updates all names and addresses of members entered into the “Congregation,” and all names and addresses of “visitors” whom you marked to be imported. It is a quick reference tool for all addresses in your Church Membership program. Let’s notice some of the features of the “Address database.

First, let’s open the Address screen. You can do this by pointing and clicking on “Addresses,” either on the navigation bar to the left of any screen, or you can go to the Main Menu and select “Addresses.” With the screen open, let’s take a look at some of the features.



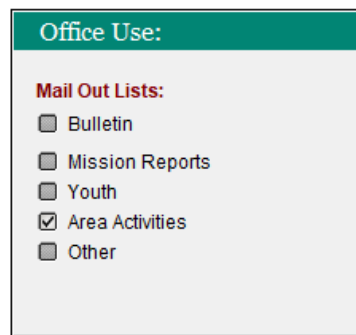
**ID (Auto):** The ID for each family, church, business, etc. that you enter into this database is automatically generated by the program. This is to guard against conflicts in ID’s between the various databases.

Most of the fields that follow are self-explanatory. But we need to take a look at the field labeled “Classification.” Please locate that field – it follows “state, zip, phone...etc. This field will default to “General” as you fill in the other fields and save your record, thereby classifying this particular family as a something other than “Local Member,” “Visitor,” “Church,” etc. If you happen to save the record without it defaulting to “General,” we suggest that you click the box that reads “Area Church,” press F9 (saves record) and then uncheck the box and press F9 a second time.

**Contributions:** We no longer offer the “Contributions” feature in our database system. Most congregations use their own financial software for recording contributions.

When entering the names and addresses of local congregations (or elsewhere) we recommend that you enter the location in the “First Name” field, and then “Church of Christ” in the last name field, and then check the box that reads “Area Church?” This will help in filtering your database.

**Office Use:** The program is set up to build mail merge lists for up to five different groups. When you check any or all of these boxes, you can generate a mail list for using in your mass mailings.



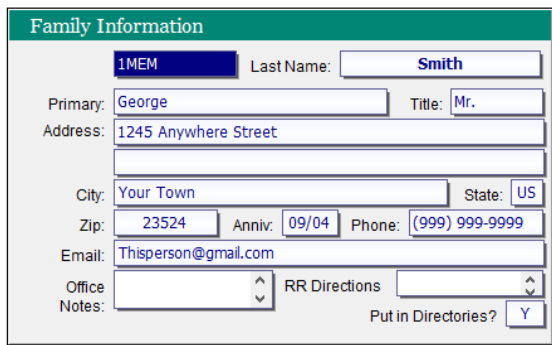
This same feature appears in the congregational screen. I’ll discuss that later.

## Chapter Three: Congregational Database

Let's take a look at the "Congregation" database. At the "Main Menu," point and click on the button that reads "**Congregation.**" When you open the "Congregation" screen you are provided the choice of working with a wide range of features. On occasions you will be working with the congregation as a whole. On other occasions you will be working with individuals. So we have developed the capability of working with the congregation by family units, or by individuals, depending on the need. If you have not opened the "Congregation" screen, do so at this time.

### Working With Families

When you open the Congregation Screen you will find a number of *blocks* containing different fields for entering data. Let's examine these more closely.



The first "block" we want to work with is family information. Refer back to this picture or your program as we discuss the different "fields" on this portion of the Congregational Screen.

**ID:** The Member ID is automatically generated. This eliminates duplicate ID's between the databases. When you enter a new member the program will let you start in the "Last Name" field.

**Last Name** - speaks for itself.

**Primary:** Enter the primary member of this family. It can be husband and wife (George and Jane), only the head of the household (George), or if a widow or widower, his or her name (Jane).

**Title:** This would be Mr., Mrs., Miss, and so forth, depending upon your preference. Or this field can be left blank.

**Address:** You are provided two "address" fields in case you need to enter a post office number. If you have an apartment number to enter, type it in with the address field: 123 Here, Apt# 5.

**City, State, Zip** are all self-explanatory.

**Anniversary:** Enter only the day and month, but not the year. The field is formatted so you need not type the "slash" (/) – just type four numbers - 01 and 01 will result in 01/01, etc.

**Phone and Email:** This also is self-explanatory. When typing I phone numbers, use 10 digits, and the program will default. Thus 9999999999 will result in (999) 999-999 automatically.

**Office and RR Notes:** These are "memo" fields. When you click inside the field you will notice a little "pencil" icon appears to the right of the field. When you click on this it opens a memo in which you can enter data. The RR note can be used to record directions to a member's house for printing later in a report.

**Put in Directories?** When this box is filled the family will appear in any of the various directory formats available (to be discussed later). When entering data this field will default to “Y” – leave it that way for now. If a family does not want to be included in directories or report, change this to “N.”

**Family Pictures:** Locate the “Family Picture” block.

When you click inside the block you will notice the little “picture icon” appears. You can either “right click” on the white block and select to import a picture, or “left click” on the little icon and locate and import the picture. The program will take Bitmap, JPG, JPEG, or PNG formatted pictures. We

suggest that when you get ready to develop and print a directory that you have someone take pictures of the congregation, format the pictures in the same type format, and made the pictures the same size so the appearance will be consistent. I also strongly the use of JPG pictures because they take less space in your database program.

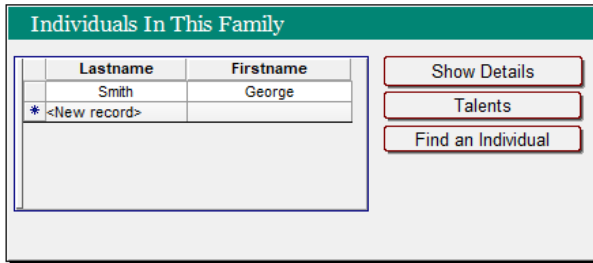


| Lastname |
|----------|
| Wacaster |
| Adams    |
| Asimakis |
| Allison  |
| Alison   |
| Alread   |
| Alvord   |
| Arnett   |
| Austin   |
| Baldwin  |
| Bellows  |
| Berry    |
| Berry    |
| Bielby   |
| Blaylock |
| Boykin   |
| Brown    |
| Campbell |
| Clark    |
| Cox      |
| Clark    |
| Dukes    |
| Eddins   |
| Ellis    |

Notice the little block below the picture field with the subtitle, “List names in order as they appear in Picture.” Once you have decided on a picture, you want to enter the names of those in the picture from left to right using first names. In the sample picture the names entered would be “Johnnie Ann, Tom.”

The browse table to the right of the screen contains the last names and primary members in the congregation. This can be filtered using the “Alphabet Tool” located at the top of the screen.

## Working With Individuals

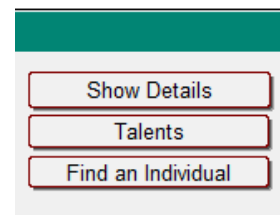


Locate the “Individuals” block of information. Information can only be entered in this block AFTER you have entered the family information discussed above. Although you entered names in the “Primary” field above, those names are not yet entered into the program as individuals in any particular family. After entering the family information, we are now ready to enter the

individual members of the family. Locate the block that contains the following information shown here. Point and click on “New record” in the browse table. The last name will default to the last name of the family you are working on. However, if an individual does not have the same last name (such as a grandchild or in-law, etc) you can change the last name. NOTE: I recommend that you enter the primary members first, with an entry for each one. You would enter a record for George, and then click on “New Record” and enter “Jane,” etc. Fill in all of your individuals in the family before we proceed to “show details” and fill in vital information for each one of the individuals.

| Individuals In This Family |          |           |
|----------------------------|----------|-----------|
|                            | Lastname | Firstname |
| *                          | Smith    | George    |
| <New record>               |          |           |

**Filling in individual details:** Notice in the illustration that I have highlighted the row containing one of the individuals. Or you can simply place your cursor on either the first name or the last name in that row. Now click on the “Show Details” button. This will open a screen for you to enter all vital information on this individual.



This will open the screen to the left and allow you to enter vital information on this individual.

The full name of the individual you are about to edit is contained in the top field. Let's take a look at the different fields in this screen:

**Designation:** This field has a drop down box providing you with some choices, but you are not limited to these designations.

**Marital Status:** This also contains a drop down box so you can enter “Married,” “Single,” “Shut-in” etc.

A side note: When you enter this field, if you simply hit the “M” key, “Married” will fill in automatically. The same is true

with the **Designation** field, and the **Gender** field.

**Gender:** Only two choices on this (at least if you want to stay in tune with the Bible).

**Nick name:** For use if someone commonly goes by a different name than given name.

**Christian:** Yes or No. Pretty simple, huh?

**Baptized:** optional, but you might want to use it for reference later. Type in digits (mmddyyy) and program will format to mm/dd/yyyy for you.

**Birthday and Birthyear:** We have designed the program so that an individual does not have to give you the year of their birth. The Birthday is formatted mm/dd. Be sure to use the number “zero” in order to provide two numbers for single digit months and dates.

**Office:** You can use the drop down list, or type in our own designation.

**Bible Class Group:** Enter the group or Bible classes they might be attending (Adult, primary, etc.)

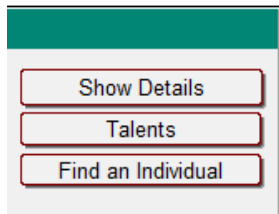
**Include in Queries:** If you plan to include this individual queries provided in the program, this must be checked to read “Yes”

**Age Group:** You may find it convenient to provide an “age group” of the individual.

**Cell phone:** Type in the numbers only. 9999999999 will yield (999) 999-9999.

**Business information:** For entering information on where this person works and how they can be contacted.

**Email:** This is the INDIVIDUAL’s email as opposed to the FAMILY email in the family information field.

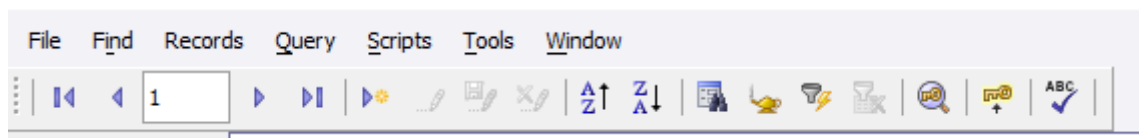


**Talents:** This button will allow you to associate this individual with the various “talents” or work skills he or she may want to utilize in the work of the church. We will come back to this later when we discuss talents

**Find and Individual:** This will locate an individual for editing.

**Find and Individual:** This will locate an individual for editing. When pressed you will be asked for the first and last names. These must be entered exactly as they appear in your database or it will not return your information. You do not need to go to his family first; instead you can simply use this button to look up any individual in the congregation to edit or obtain information.

## Menu and Tool Bar



It might be good right here to discuss the various icons that appear at the top of your screen. You can use these buttons and menus to maneuver through the program. Before we do that it is important that you have a few names in the database. If you have not yet entered any data, we suggest that you stop here and enter three or four families, and a couple of individuals in each family. After you do that come back and we’ll discuss some of these icons and buttons.



When you start entering a record in any database, you will notice that the following icon “lights up.” Once you have entered the information you have the choice of either canceling the changes by pressing the red X, or save the record by pressing the blue disk.

**Moving from one record to another:** Once you have entered a lot of information, you can move from one family record to another in various ways. You can use the following icons on your



tool bar: The blue diamond with the bar to the left will take you to the first record in the Family Database. The single diamond

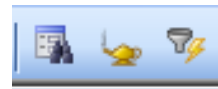
pointing left will take you to the previous record. The diamond pointing to the right will take you to the next record. The diamond with the bar to the right will take you to the last record in the database.

**To Enter a New Record:** There are two ways to enter a new record. You can point on the blue diamond with the orange asterisk (see picture) or use a short cut with keys by pressing CNTRL and E at the same time.



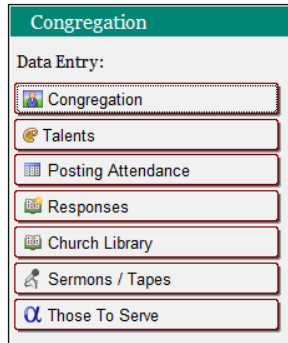
**Sorting Records:** You can sort A to Z or Z to A on almost any field. Simply put your cursor in desired field, and press one of these keys.

**Search/Filter icons:** There are three icons on the tool bar that allow you to search and filter your data. From left to right in the picture. The one on the far left looks like a pair of binoculars. When you click this, the program will open up a screen that is identical with the one in which you are working. It is what we call a “Query Screen.” The program is asking you for information by which you want to filter the information on your screen. Select any field, and type in the information you want to use to filter the screen. We’ll talk about searches later, but right here try this little experiment. Put your cursor in the “last name” field, type an asterisk (\*), a word or any portion of a word, then conclude with another asterisk. The asterisks are wild cards in a search and when you run the “run query” button at the top, the program will show you all records that contain the word you entered, regardless of what appears before that word, or after that word. If you type an asterisk (\*), followed by a search word, then follow that with your second asterisk, and then follow that with a comma, another asterisk and word and closing asterisk, you are asking the computer to show you all records that show either of the two words or portions of the word.

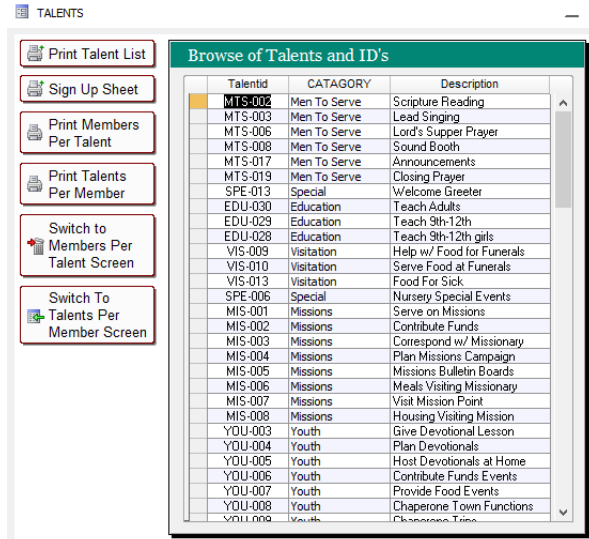


## Working With Talents

The Church Membership Program allows you to record, trace, and utilize the talents and work areas of each member in the congregation. We think you will find this particular feature of the program a very useful tool of the program. Let's open the Talent Screen. Return to the Main Menu.



Now point and click on the “Talents” button. This will open the screen to the left [illustrations may vary depending on what version you have of the program]:



Now let's discuss each of the features of the “Talents” database. First,

we have provided a long list of talents commonly used by congregations. This will save you some time, but I suggest that you go through the list and edit it to your particular case. Notice that under the talent ID we have used a two or three letter prefix in order to departmentalize the various talents.

**We strongly urge you to categorize your talents** with a three or four letter prefix. For example, in the illustration notice that one prefix is “MTS” or “WOR” – This would stand for “Men To Serve” or “Worship” talents and abilities. “EDU” would be for talents in the Education department. You might use “VIS” for areas of visitation. “MAIN” might be used for “Maintenance.” Only your imagination is the limit. But, as in all data entry, stay consistent in the use of prefixes. If you use “WOR-001” for “Leading singing,” and then you use “WOR-01” for “leading singing” as well, you will have problems with other features of the program. **NOTE: MOST DIFFICULTIES WE ENCOUNTER WITH THE OPERATION OF THE CHURCH MEMBERSHIP PROGRAM CENTERS AROUND DATA ENTRY.**

**Print Talen List:** This will print out a list of all the talents you have listed here.

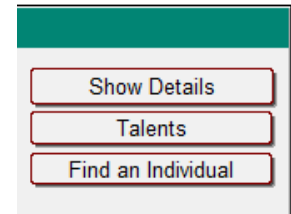
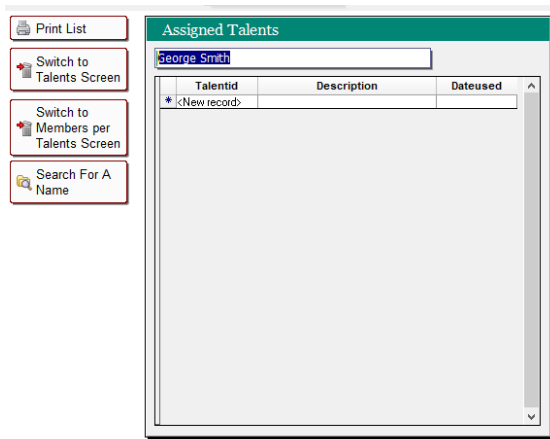
**Sign up Sheet:** This will provide a blank sign up sheet to pass out to the members so they can sign up for those areas in which they want to work.

**Print Members per Talent & Talents per member:** These two print options will let you print out a list indicating the various areas where members have signed up.

We suggest that you go ahead and enter a dozen or so talents into your database for practice. You can go back and edit these later, or you can completely empty the database later and start from scratch. Once some of the talents have been entered, it is time to go make “assignments” to the individuals who volunteer to serve in any particular area of work, generate reports, etc.

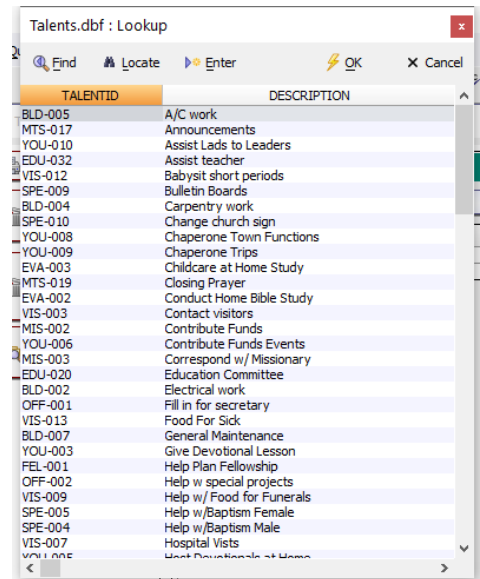
**Making Talent Assignments to Individuals:** Prior to the introduction of sophisticated computers, congregations usually had someone fill out a “talent list” showing what areas they would be willing to work in. Those cards would be filed away, and when someone was needed to “paint” or “mow the lawn,” etc. it was a slow tedious process to determine who might be willing and available to do the work. With this feature of the program a list of those who volunteer to work in any given area is just a click of the mouse away. But before that can be done, the data must be entered. If you have not already entered data into the “Congregation” database, and the “Individual” database, and the “Talent” database, we urge you to do this so you can get a better “feel” for the usefulness of the program. Once you have done that we can begin. So go do that and then come back to this page.

**Let’s assign talents to each individual:** Once you have entered the various talents, it is time to assign talents to each individual. Open your “Congregation” screen, and in the “Individual Details” highlight the name of the person you want to assign talents for which he has volunteered.



Then click on the “Talents” button shown in the “Individual Details” block. This will open the following screen giving you the option to enter any and all of the desired talents this individual has volunteered to work. Notice the “New record” option. Press and click on that “New Record” to open the following screen to the right. You are now given the option to assign any of the talents

you have in your database into this individual’s talent list. **Before you go through the trouble of scrolling down this long list, just start typing the word “Electrical work,”** and the program will jump to the talent you are looking for. Then press the “Find” button on your screen and simply hit the “enter key” on your keyboard and the talent is filled in. Repeat this step for each of the talents you want to enter for this individual.



Once you have completed filling in all your data you can use the various buttons to produce reports, etc.

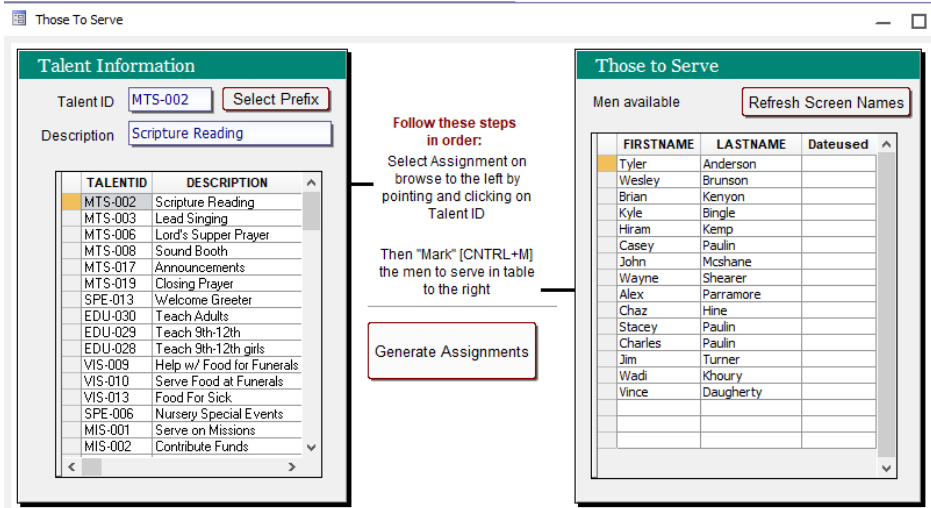
**Making assignments and tracking service per member:** This particular feature of the program is something unique to our database. I have not come across a church database that offers what you can do with “Those To Serve” feature. Let’s see what it will do.

**Those To Serve**

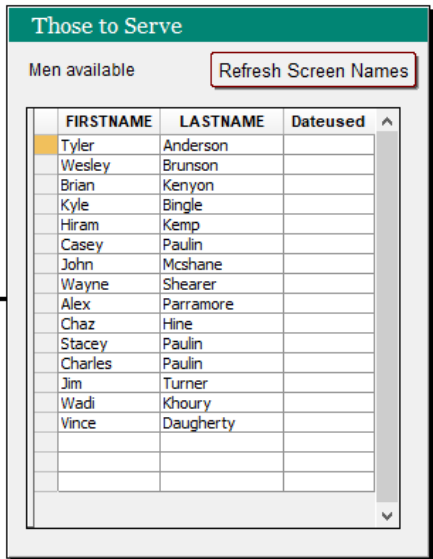
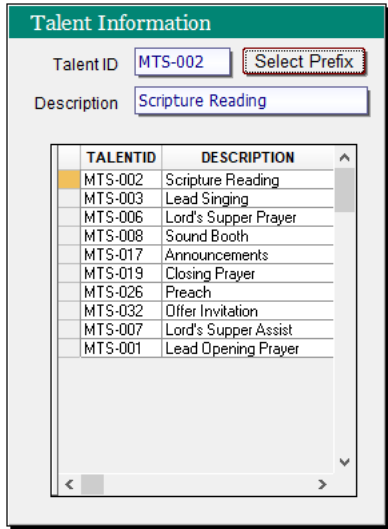
First, return to the “Main Men,” and point and click on “Those to Serve.” This will open the following screen:

On the left side of the screen you will see the “Talen Information.” On the right side you will see “Those to Serve.” Let us suppose that you want to generate a list of all the men to serve in the various parts of worship.

First, point and click on the “Select Prefix” at the top of the left table. This will open a “parameters” screen for you to enter your desired prefix (in this case we will enter MTS for “Men to Serve” in worship. You will notice that the program has



now filtered the “Talent Information” to show on the MTS talents. When you highlight any one of the Talents, the screen on the right will show all those who have signed up in this area. As you scroll down the list of the “Talent Information” the names on the right will change depending on whether they have assigned up for that area of work. Occasionally you will see a date beside someone’s name. As you work with your database, the date when that person was last used appears.



Now, lets prepare to generate a list of all those who will be assigned to the worship on a given Sunday. We will make a list to include “Lead Singing,” “Scripture Reading,” those who wait on “Lord’s Supper for prayer,” and Lord’s Supper Assist,” and the “Lead Opening Prayer,” “Closing Prayer,” and made “Announcements” [note each of those talents in the left window].

Let’s select the “Announcements” person first. Point and click on the grey box next to the “Announcements” talent. It will turn the block gold color (see illustration below). Now let us select the one man to make the announcements. Usually the one at the top of the list since the names will appear in order of last served. Point and click on the grey box next to the desired name. It will turn gold. With that name still highlighted, press the CNTRL and M keys to “Mark” that name. DO NOT FILL IN THE DATE. Now ove to the “Lead Singing” talent, highlight and repeat the

**Talent Information**

Talent ID:

Description:

| TALENTID | DESCRIPTION          |
|----------|----------------------|
| MTS-002  | Scripture Reading    |
| MTS-003  | Lead Singing         |
| MTS-006  | Lord's Supper Prayer |
| MTS-008  | Sound Booth          |
| MTS-017  | Announcements        |
| MTS-019  | Closing Prayer       |
| MTS-026  | Preach               |
| MTS-032  | Offer Invitation     |
| MTS-007  | Lord's Supper Assist |
| MTS-001  | Lead Opening Prayer  |

process with the man to lead singing this Sunday. Make sure the names are “marked” – if properly marked, a little grey dot will appear in the square you highlighted.

Now let’s fill in multiple names for one assignment. On the Talent screen, select “Lord’s Supper Assist.” Click on the grey box on the top name, and holding down the left button DRAG that box to highlight four or five names of those who will serve on the table this Sunday. Once highlighted, press CNTRL and M to mark the names.

**Those to Serve**

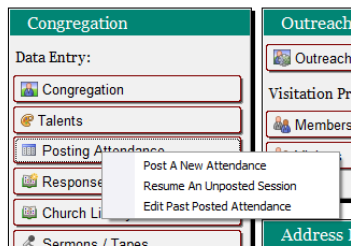
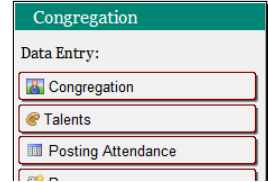
Men available

| FIRSTNAME | LASTNAME  | Dateused |
|-----------|-----------|----------|
| Tyler     | Anderson  |          |
| Wesley    | Brunson   |          |
| Phil      | Fife      |          |
| Brian     | Kenyon    |          |
| Jeff      | Bingle    |          |
| Hiram     | Kemp      |          |
| Casey     | Paulin    |          |
| John      | Mcshane   |          |
| Wayne     | Shearer   |          |
| Ed        | Parramore |          |
| Alex      | Parramore |          |
| Matt      | Willcut   |          |
| Josh      | Estridge  |          |
| Chaz      | Hine      |          |
| Stacey    | Paulin    |          |
| Charles   | Paulin    |          |
| Ken       | Walker    |          |
| Dustin    | Walling   |          |
| Dennis    | Mccarter  |          |
| Wadi      | Khoury    |          |

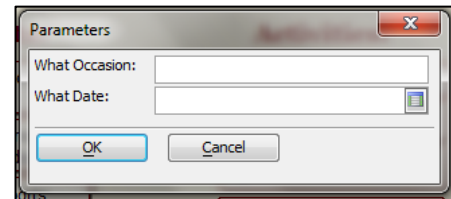
You are now ready to generate your list for this Sunday’s assignments. Press and click on the “Generate Assignments” and then select “Print” when the choice appears. The program will ask for a date, and then record that date for those who served and roll them to the bottom for next time you make assignments.

## Working With Attendance

Return to the Main Menu screen, and let's continue by studying the "Attendance" feature. Church Membership 2020 provides you with the capability to track attendance and then generate reports of absentees, and other attendance related data. At the Main Menu, locate the "Posting Attendance." When you click on that button you are given three choices: "Post a new attendance", "Resume an un-posted session" or "Edit Past Posted Attendance. In order to test this, you will need to have some **individuals** entered in the Congregation. Do that and then come back to this page.

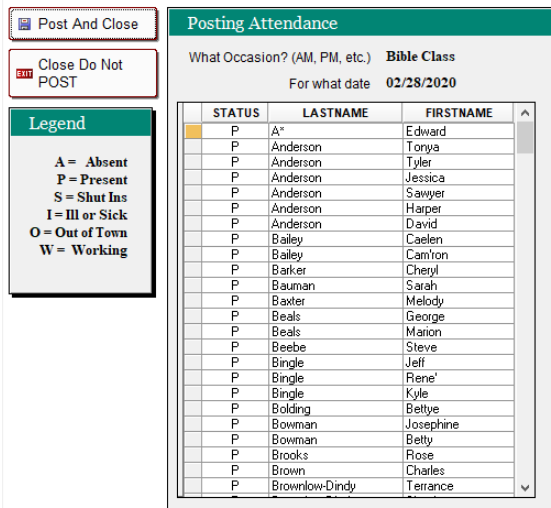


**Post A New Attendance:** When you select this button, you are provided a screen to enter new data for a session in which you want to track attendance. The following "parameters" screen will pop up and allow you to fill in "What Occasion" this attendance refers to (Bible Class, AM Worship, PM Worship, etc). Next you type in the date of what you are posting.



After filling in this information, point and click OK, and the following screen will open. There are several things we want to notice about this screen.

**First,** notice that the "Status" column defaults to "P" (to stand for "present"), since most of the members will be present on any given assembly. However, if you filled in the words "Shutin" or "Shut-in" in the individual form in the "Office" field, that person will default to "S" (for 'shutin').



**Second,** notice that the "what occasion" has filled in "Bible Class" as you designated in the 'Parameters' field above, and the "For what date" contains the "date" you filled in the 'Parameters' box above.

**Third,** before posting an attendance to the permanent record, scroll down and mark those absent. If you have the members fill out cards, it would be best to put the cards in alphabetical order by last name before starting our entries. If you use one of our blank "attendance check lists" from the main menu to check the roll, the names will appear in alphabetical order.

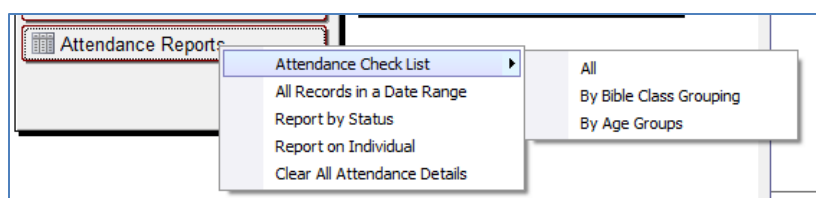
**Fourth,** if you have to stop checking the attendance or get interrupted, you can click on "Close and Do Not Post." When you get ready to resume, go to the main menu, click on "Posting Attendance," and then select "Resume an unposted session." This will open the screen to resume your entering the attendance data. But suppose you have already posted the attendance, and you have to make some corrections. You would then select "Edit Past posted session." This will open the records that have been posted and you can scroll down the list of names until you get to the

name where you have to make a correction, and then scroll down in the right screen until you find the date you want to edit.

**Finally**, notice the little “Legend” screen. These simple one-letter codes are recommended but you are not locked into the codes we recommend. The only exception being “S” for defaulting to “Shutins” and “P” for present.

Keep this in mind that the program can only store ONE UNPOSTED SESSION AT A TIME. Once you have entered all information for attendance in any one session, you can then post and save.

**Attendance Reports and Charts:** Once information has been entered into your Congregation’s Individual database, you can generate a wide range of reports having to do with attendance. Locate the “Attendance Reports” button at the Main Menu. When you point and click on that button you get several choices:

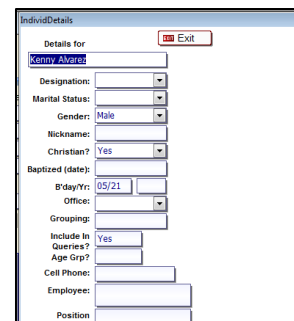


**Attendance Check List:** When you open the “Check List” choices, you can run off a blank attendance check list for taking roll. In order to get the full benefit of the “Class

grouping” and “age Groups” you will have to have filled in the information for all of your individuals in each respective member with regard to “Bible Class” groups. Some choices, “Adult,” “Adult I,” “Primary,” “Cradle Roll,” etc.

Let’s work with “Attendance Check List” first. Point and click on menu selection and then select “All.” A print out will appear and you can run that off for checking attendance, either for ALL the congregation, or “by grouping.” The “by grouping” is based upon a field in the “Individual database” screen. Let’s reopen that screen to see what field we are talking about. Go back to the Main Menu, and open the “Congregation” screen. Next, at the top of the Congregation Screen, locate and click on “Find and Edit An Individual.” You will be asked for “First Name” and “Last Name” to get a screen we can work with.

Now locate the field labeled “grouping”- Let’s suppose you put this individual in the Adult I group. This will allow you to run reports on all individuals in any given group. **NOTE: YOU MUST BE CONSISTENT IN ENTERING DATA. IF YOU ENTER “ADULT 1” IN ONE INDIVIDUAL, AND ADULT I FOR ANOTHER INDIVIDUAL, THE REPORTS WILL NOT BE ACCURATE. SO MAKE SURE YOU ARE CONSISTENT IN ENTERING DATA THAT WILL BE USED FOR FILTERING REPORTS.**

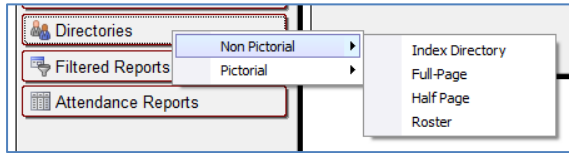


“By Agegroup” will arrange the individuals in the congregation based on their age. **TIP:** When entering the data for each individual be sure to enter data in the “BIRTH YEAR” field. Then when records have been entered, close out all screens and go back to the Main Menu. In the “Maintenance” drop down list, select “Update Age Group.” The program will calculate how old each member is based on their “birth year” entered earlier. Let me suggest that if a person does not give their birth year, just guess. Otherwise when the update is performed on the database, it will calculate those who have no “birth year” data to be the age of 2020, etc.

**Attendance Reports:** Once the information has been entered you can generate a number of reports. There are a wide range of reports on attendance that you can run and we suggest that you simply experiment with them to see what each one does.



## Pictorial Directories



Church Membership program can produce several pre-designed layouts of Church Directories, both non-pictorial and pictorial. In order to include a family in the congregation there is a field in the Congregation screen that must read “Y” - open the

Congregation screen, and locate “Put In Directories” at the end of the family information block and just before you get to the “Individuals” browse table. This field defaults to “Y” when you first enter information about the family, but if for some reason a family does not appear in one of the directory layouts, check this field first. When you click on “Directories” at the Main Menu, you are provided with Non-Pictorial and Pictorial choices. We suggest that you simply take a look at each of these to see what is available. If you purchase the program we will give you several hours of free support to help you design the layout of pictorial and non-pictorial directories.

## Visitation Program

The Membership 2020 program has improved on the visitation features. You will need to have some data in the Outreach/Visitors database and the Congregation and Individuals; so if you have not yet entered any it might be good to go enter two or three names before proceeding.



Click on “Outreach / Visitors” on the main menu. This will open a screen with four blocks of information. We will look at each block and some of the features of the Outreach / Visitors. Right now we will work with entering data in the visitors database. We’ll work on the “Visitation Program” later.

The illustration to the right is where you enter the details of those who visit the congregation or who you may have enrolled in a personal Bible study or correspondence course. We will discuss how to track studies (if that is what you want to do) later. Right now, just concentrate on getting the personal information into the database. There is one field we want to call your attention to. It is the “Include in Address book.” The general address book (discussed earlier) will automatically import this date from the visitor’s database when you perform an update address book. Take a minute and enter some records (real or imaginary). NOTE: the browse table to the right of this screen displays family records in a spreadsheet type view.

| Date           | Service | Guest Of |
|----------------|---------|----------|
| 09/16/2018     | A.M.    |          |
| 12/16/2018     | A.M.    |          |
| * <New record> |         |          |

Still working with the “Outreach / Visitors” database, this little browse table appears at the bottom/left of the screen. Once you enter the personal information of the visitors, you now can track the dates and occasions when they visit the congregation. You can also record who they were a “Guest Of.”

To the right of this browse table you will find another section titled “Requests from visitor.” If you use similar cards for registering visitors, you can then check any of the fields representing your visitor’s desires.

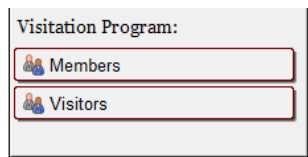


When you click the action button

titled “Visitors on a given date,” the program will generate a little report showing the data you have entered. We will discuss “Open Saved Merge Letter” later.

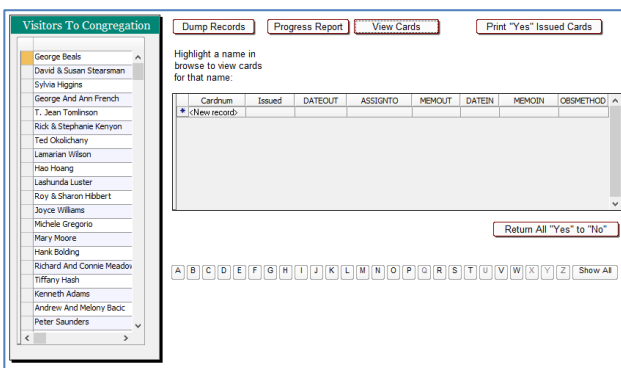
## Visitation Program

Once you have familiarized yourself with the “Congregation” and “Visitors” databases, you are ready to use your data to start your visitation program. Return to the Main Menu, and locate the “Visitation program,” located in the “Outreach / Visitors” block of information. You will notice



there are actually two visitation programs: (1) Members, and (2) Visitors. We have separated the two because each database contains different kinds of information in slightly different formats. Let’s skip the “Members” visitation for now, and take a look at the “Visitors” visitation. So click on that button. This will open the following screen.

Notice the following items on the screen. At the left there is a browse table showing all the names in your Visitors database. You can filter the names using the alphabet buttons on the screen. When you select one of the names in the browse table, all cards issued for this contact appear in the browse table to the right. Now we need to discuss the columns that appear in this table. We’ll refer back to this image several times.



**Card #:** When you get ready to enter a record, point and click on the “new record” area of this browse table. You will notice that the card number automatically fills in. This is to prevent duplicate card numbers in this and other visitation databases.

**Issued:** When you tab to this column you have a drop down box that gives you a choice of “yes” or “no.” If you plan to issue this card when you perform a print operation, you will need to select “Yes.” Otherwise the card will not print.

**Date Out:** This is the date you assign the card for visitation.

**Assign To:** This is who takes the card to make a visit. It could be the elders, the preacher, or some individual.

**Memo Out:** When you tab into this field you will notice that little icon that looks like a pencil pops up. You can click on that and open this field to write instructions for the one making the visit. This might include best times to visit the person, directions to their house, etc.

**Date In:** This is when the card is turned back into the office.

**Memo In:** This is also a memo field where you can enter information that the one doing the visiting might want to pass along to the church office.

**OBS Method:** If you are tracking Bible studies for this individual, you can enter what kind of study method is being used and where you left off.

**Buttons for Reports:** At the top of the screen you are provided with three choices. You can “dump” records. This will erase ALL VISITATION RECORDS FOR EVERY CONTACT. We

suggest that after a quarter or year that you produce a “Progress Report,” and save it as a PDF copy for future records before dumping details. Then dump all records when you are ready to begin a new session of visitation when you “reorganize.” This will keep your database from becoming cluttered.

**Progress Report:** You may be asked from time to time to print out a progress report within date parameters. This will produce a report on those who have visited, those involved in bible studies, and the progress over a period of time.

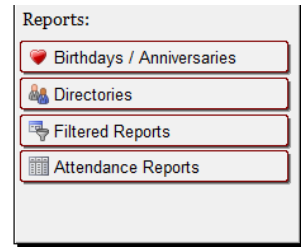
**View Cards:** This little button will produce a brief list of those

**Print Yes Cards:** Once you have assigned all cards you want to issue for the visitation team, you can press this button and it will provide you with a copy of all visits to be made, printing one record per sheet. You can then distribute these to those making visits.

**NOTE:** Visits to members is essentially the same procedure except that the records are for members of the congregation. You can access this at the Main Menu, under “Visitation Program” and the “Members” button.

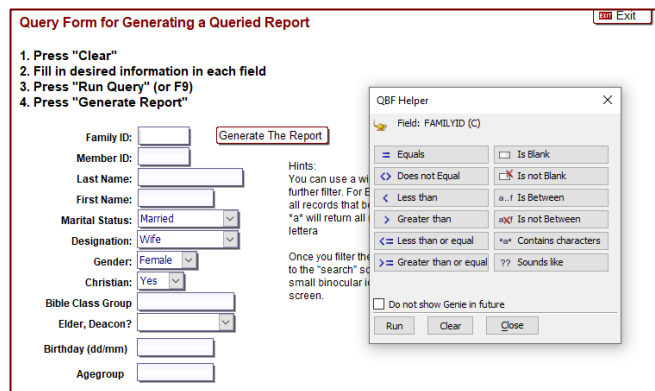
## Other Reports You Can Generate

**Birthday and Anniversary Lists:** You can generate birthday lists and anniversary lists from the Main Menu. Keep in mind that these lists include ONLY members of the congregation since the “Address” book and “Outreach” screens do not use individual names. To generate a birthday or anniversary list, simply click on the button at the Main Menu located under the “Reports” buttons. When you enter your search criteria, **be sure to enter the month for searching with TWO NUMERALS**. If the month you want is June, use “06,” if November, use “11” etc. Same with the anniversaries. You can then fill in the title you want to appear on the report. “Anniversaries” works the same way.



### Working With Filtered Reports:

At the Main Menu, locate the button that reads “Filtered Report.” Keep in mind that these filtered reports are for the Congregation only. Go ahead and point and click on this button and let’s open the screen. There are several things you should notice about this screen. This is an empty screen asking for information that will help you filter your database and produce a report showing desired information. So let’s take a closer look on how to use the screen:



First, **notice the QBF helper** block. The first thing we want to do in make sure the fields are all empty. So if data appears when you open this screen, select “Clear” in the QBF Helper” block. This will provide you with an empty screen for entering your search criteria.

Second, **Fill in desired information in each field you want to filter**. If you want a report showing the “MEN” of the congregation who are married, then fill in


the “Marital status” with “Married,” and the “Gender” field with “Male.”

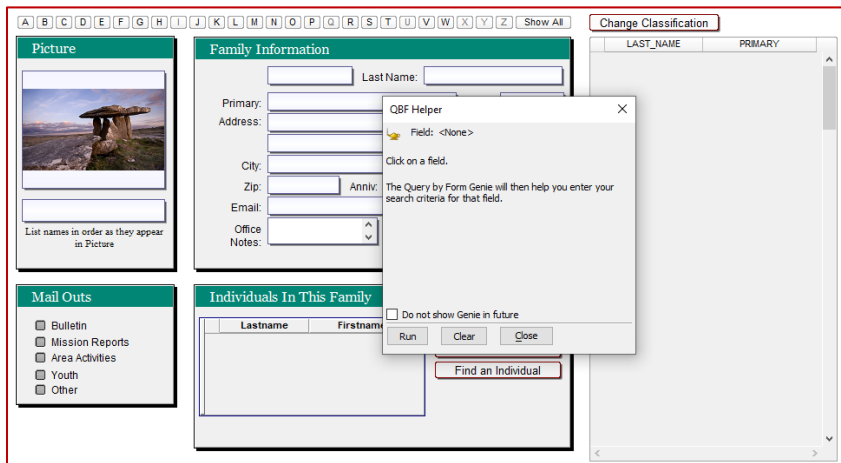
Third, **Press the Run query (or the F9 key)**.

Fourth, now you can **Generate Report** by pressing the “Generate Report” button.

It’s that simple!!!

**Searches:** Church Membership 2020 has a wide variety of search features. We will discuss some of the most commonly used search features. To demonstrate these features we will use the “Congregation” screen. The same search features appear in all of the databases in the program.

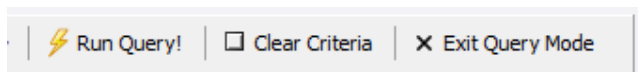
**Query By Form:** Those most common search feature is the “Query By Form.” If you have not already opened your “Congregation” screen, do that now. After opening the screen, take a look at the menu bar at the top and locate the icon that looks like a pair of binoculars. 



When you click on this icon the program will open the screen to the left. You will notice that it looks a lot like the screen we used to produce filtered reports. Notice the instructions in the QBF Helper block. This little block floats so you can move it out of the way to enter data in the fields you are working on. As you click in a field, the QBF Helper shows the name of

that field in that block. Once you have entered all of the criteria you want to use to filter your data information, just press “Run.”

**NOTE:** When you are in a “Query” mode, the following buttons show up on the menu bar. Once



you have finished filtering your data, and want to return to show all records, you need to eliminate the filter. Look on the menu of

you “Congregation” screen and locate the following button: a filter turned on. Click it, and your database will now show



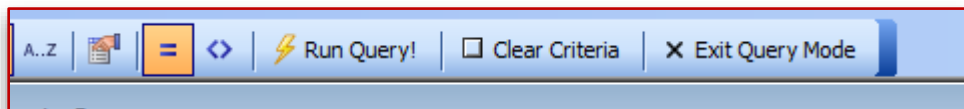
This indicates that you have all the records.

Now take some time and do some exercise using this search feature before we discuss another search feature of the program.

You can also perform searches without using the QBF Helper utility we just discussed. So, let’s return to the Congregation screen and start our searches over.

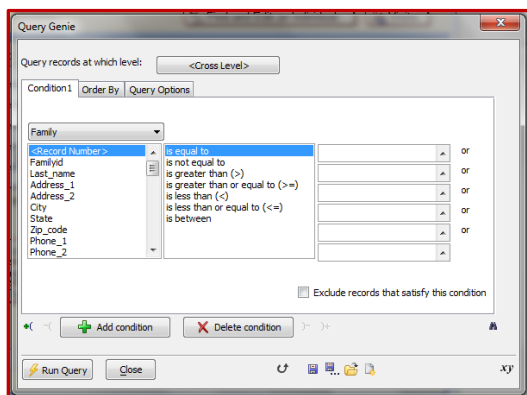
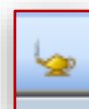
Go ahead and press the little “Binocular” icon that open the “Query By From” screen again. You will notice that the screen is blank, and the following icons show up on the menu bar:

Now let’s “close” the QBF Helper block by clicking on the “close” on the QBF Helper block. This will leave you with a screen without any data showing and this menu at the top. In the “Last Name” field type one of last names in your database and click on “Run Query” button.



The program will filter your database to show only families with the last name you typed into the field.

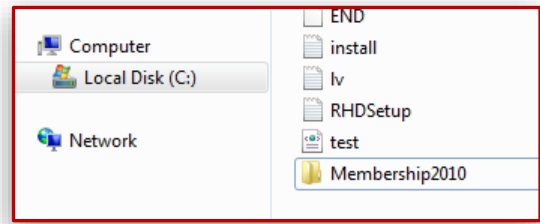
**Search Using The Query Genie:** Now let’s discuss another tool for performing searches. Close all of your search screens, and make sure you are back to the “Congregation” screen showing data. Locate the “genie” icon on the menu bar. When you point and click on this icon the following screen will open:



Notice the list of fields in the far left. You can select any field, and then enter criteria provided in the middle column. You can add multiple search criteria, using condition 1 AND condition 2. You can also add criteria for a condition 1 OR condition 2. You will have to experiment with this feature to see the power of this search feature.

## Backups

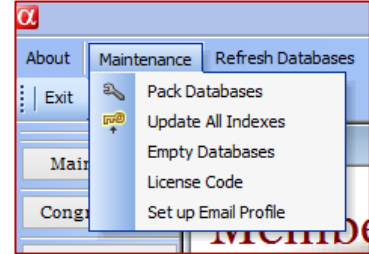
The best way to perform a back up is to simply copy the entire application in one procedure. If you are familiar with using the Windows Explorer, this should be fairly easy to understand. Open the windows Explorer and locate” Local Disk (C:) in the left portion of the window. The right part of the frame will show all folders off your C drive. Locate the folder “Membership20” [the illustration shows the membership 2013 from previous years] but the principle is the same. The program installs the application in this location, but if you selected a different location at time of install, you will need to locate that folder.



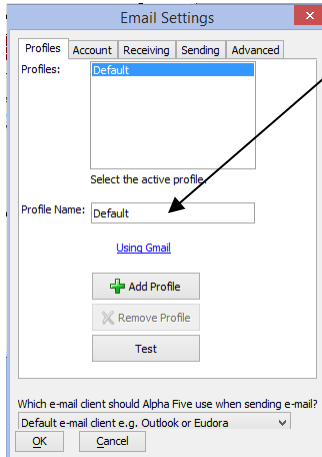
Now just COPY the entire folder. If you ever have to reinstall your membership program, you will only need to install the “AlphaFiveRuntime” and then paste this folder containing the application where you desire.

## Chapter Five: Working With Emails, Mail Merge, etc.

The program is able to send out individual and/or mass emails to everyone who has an email entered into the database. Before email can be utilized you need to set up the email profile. At the Main Menu, open the drop down menu from the “Maintenance,” and then select “Set up Email Profile.”

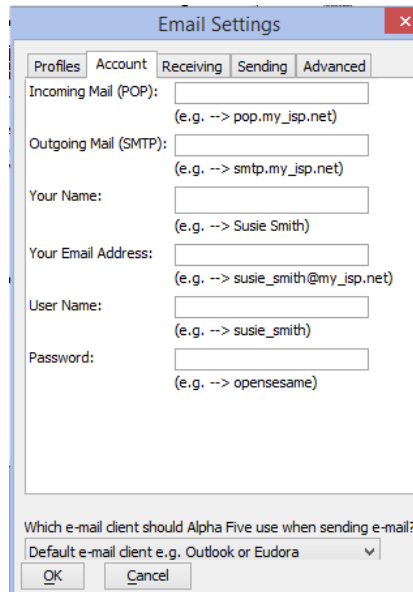


This will open the following screen for you to set up your profile. It will open with a “Default” profile. Let’s change that and give it a name that you would use with the church email account. Enter your desire name here.



Next, let’s go set up the Account information. When you point and click on the “account” tab (see illustration) it will open the following screen:

You will email in the choices “Sending,” sections as



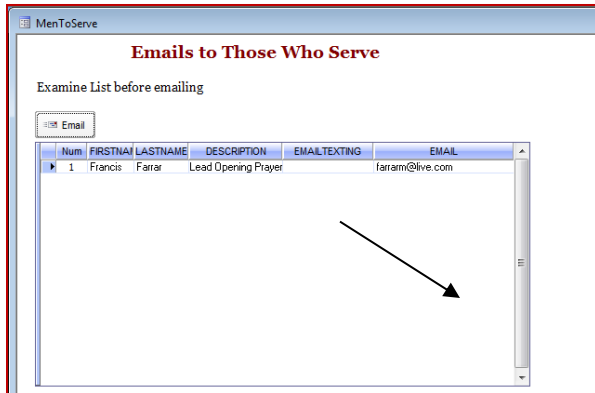
need to consult your provider to get the information for filling various fields in this set. Be sure to look at the under the “Receiving,” and “advanced” you fill in the information your

provider requires.

Once all the information has been on the “Profiles” tab, and run a test. whether or not you have properly set

filled in, point and click This will tell you up your email profile.

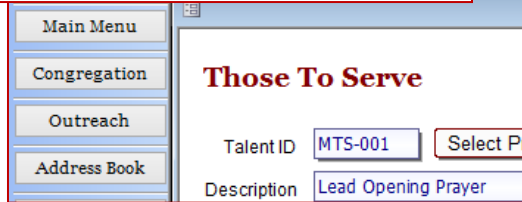
Once your profile has been set up, you will be ready to set up the email feature on “Men to serve.” So, let’s go back to the “Those To Serve” at the main menu and open that screen again. Once there, and after you have selected men to serve in the various areas of worship, and perhaps have run a preview of what you are about to print on paper, you can now generate a mass email that will send the assignment to those men who have email addresses entered into the database. Remember that you had to “generate” the assignment list? When the screen pops up asking if you want to print or email, let’s press the “email” button. The following screen will appear [next page]:



At this screen you can now access a typical email screen.

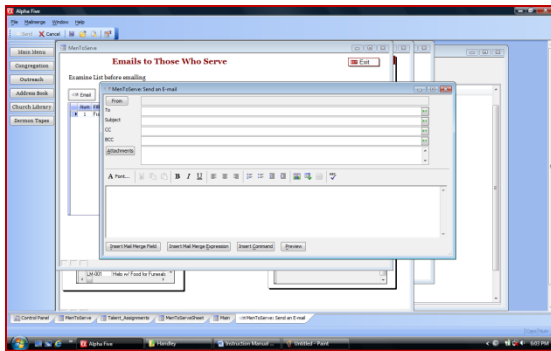
At the top of the screen locate the “tools” button, point and click, and then select “email” from the drop down list.

This the appear back

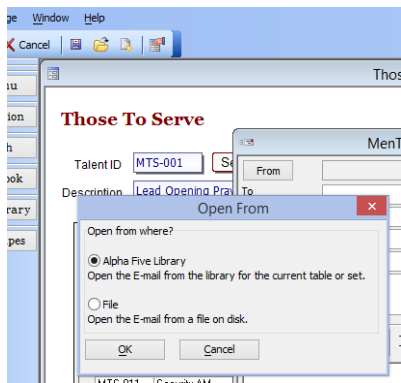
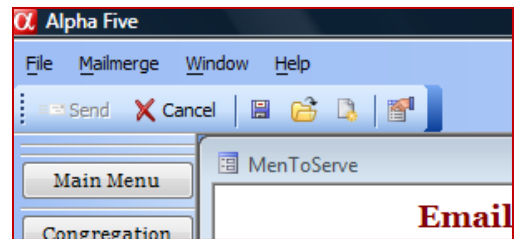


will open a blank email screen like the one is following image. Your email address should in the “From” field. If not, you need to go and set up your email profile. With this blank email screen we are going to set up a

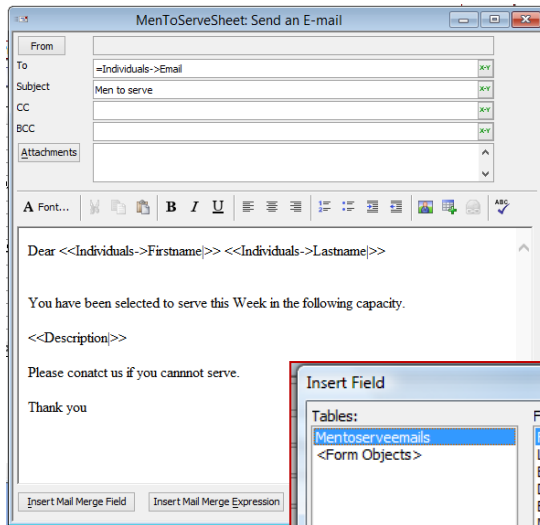
“draft” for “Men to serve” that will later be used in your email mailings to those men who are selected to serve. In fact, you can save any number of “drafts” for various emails you might want to send out. But for now we will concentrate on a draft for the Men To Serve.



We have provided a sample for draft for “Men To Serve.” To access it, and with the blank email presently open, point and click on the folder menu at the top of the screen

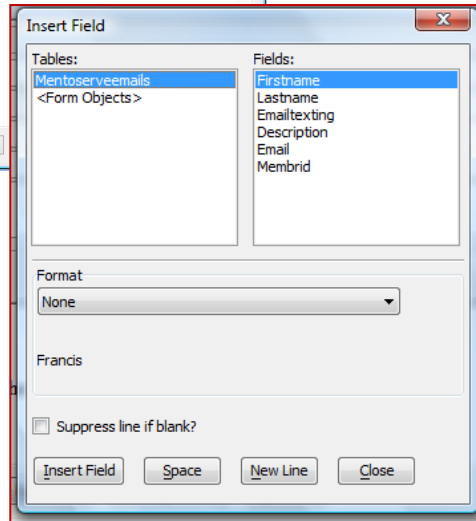


This will open the “Open From” screen to access the draft copy from the Alpha Five Library...simply select “OK” and then choose “Men To Serve.” When given the choice, select “Message and header” to open the entire draft email form. Go to next page to see your draft copy and an explanation of what it contains.



First, the “To” field is filled in with a “merge field” from the “Individuals” database. To access these fields, point and click on the “Insert Mail Merge Field” located in the bottom left corner of the screen

This will open the following screen from which you can select a field

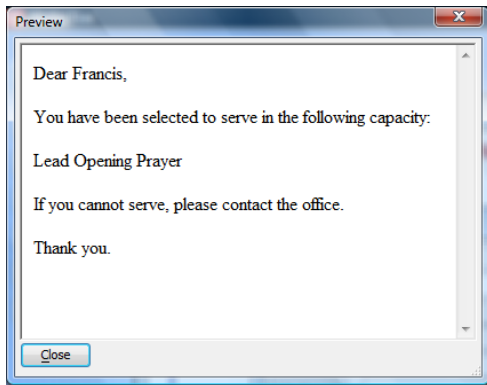


If you want to the greeting line first and last. We

The field “email” Congregation field.

insert just the first name following double click on it; or you can use both have used both.

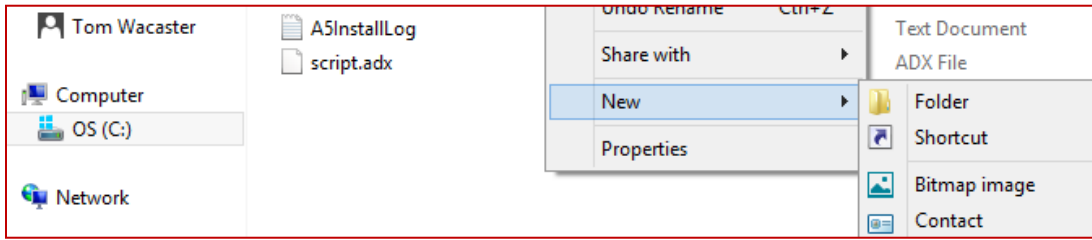
contains the email address put in the database, Individual members email



You can now “preview” this email. Here is what this set up yields [to left].

## Merge Mailings

The Church Membership program is designed to export the various databases to mail merge files in “asci\* format. However, in order for the program to complete the export you must manually set up a folder on your hard drive to receive these mail merge exports. Open your Windows Explorer and locate the “C drive” in the left column. Using your mouse click the left button to highlight the C drive.



In the right side of the window, right click with your mouse. This will open a box with one choice being “New” – click on this and then click on “Folder” – and then **name the folder exactly - “mailmergefiles”**

When you export your database files from the program they will appear in this folder for easy mail merge with almost any word processor.

