FlockBase

User Guide

Version 3.0 – 12/17/2009

Introduction:

FlockBase is a powerful, yet easy to use Contribution and Membership tracking program.

Installation from CD: (Disregard if installing from download)

<u>It is recommended that you reboot your computer before installing any software.</u>

After you insert the CD, the setup program should launch automatically. (If you are presented with options, click <u>Run SETUP.EXE</u>)

If the setup program does not launch automatically:

Click Start, Run (Classic menu) or Click Start, type <u>Run</u> in the <u>Start Search</u> box, Click <u>Run</u> from the programs list

In the run Open box type d:\setup.exe where d: represents your CD drive. If you CD drive is not drive (d:), insert your drive letter in place of the (d:).

Follow the prompts to install the program.

Note: The programs default location on your computer is Local Disk (C:) The location can be changed, but that would normally be done by users that do not have a Local Disk (C:), or by users performing a custom install.

This is an install CD only. <u>It creates your empty data files.</u> It must only be used for <u>original</u> installs, or if you have a viable <u>backup</u> of your data.

Selecting location for installing program and data file:

Normal (Typical) installation would be to Local Disk (C): for both the program (FlockBase) and the data file (FlockBaseData)
Custom Installation:
If you do not have a C drive, you can select another Local drive.
Networked Computers info:
If you are on a network, you can move the data file (FlockBaseData) to your network drive, after you have installed FlockBase. FlockBase provides the ability to select the data file's path at the Welcome screen each time that you open FlockBase. After you have established the data path it is not necessary that you change it again. However, it does allow you to change the data path at anytime that you have the need.

Notes about Version 3:

FlockBase has been considerably enhanced and now provides the following additional capabilities.

1. Pledge recording and reporting.
2. Attendance recording and reporting.
3. Mail merge datasheets(content selectable via filters)
4. Photo Directories and enhanced Text Directories.
5. User assigned report titles(Membership)
6. User assigned dates for both Households and Members.

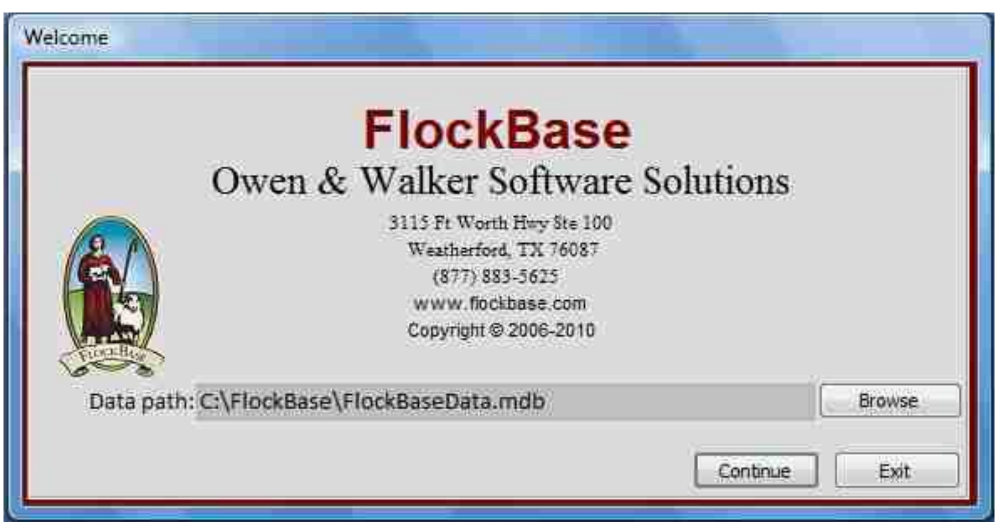
These new features do not add to the complexity of the basic FlockBase Membership and Contribution tracking. The above new features are for optional usage and can be disregarded, if you only want to utilize the basic functions of FlockBase. With this in mind, we have changed very little on the basic functions and instructions. The instructions for the new features are compartmentalized following the original basic instructions.

7. Password protection for users is now provided as follows:
   a. Administrator: Full authority to all functions.
   b. Financial: Authority to all functions except Setup.
   c. Membership: Restricted from Financial functions and Setup.

   The person who initially sets up the software will be recognized as the master Administrator and will have the ability to establish all additional users. There can be multiple Administrators, Financial, and Membership users.

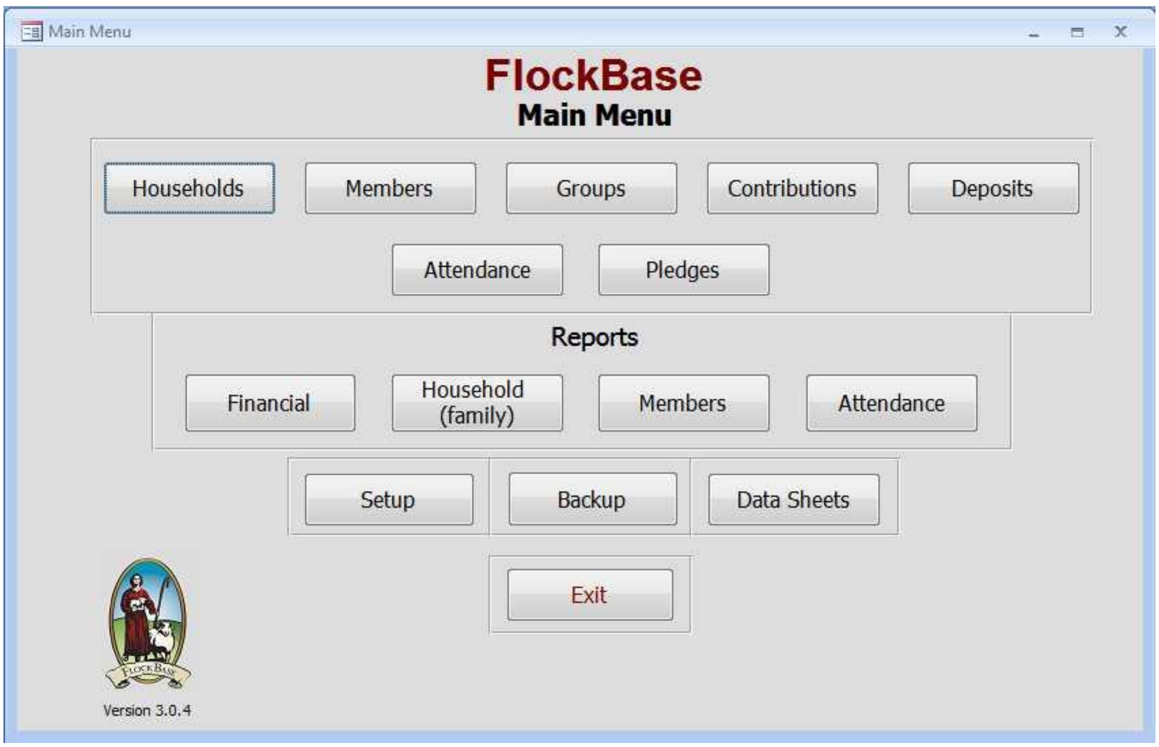
Starting FlockBase from your start menu or desktop icon.

Each time that you start FlockBase you will be presented with a data path screen. This is to allow you to change the data path before you enter the program. Normally you will just click Continue and pass on to the Login screen.



Startup:

To open the program, click the FlockBase icon on your desktop Start menu or double click the FlockBase desktop icon shortcut.



First time Login and Setup Steps:

The first time that you login after having installed FlockBase, select Administrator from the dropdown box and then enter the initial password provided with your package. This will take you to the Main Menu. At that time you will perform the following steps:

1. From the FlockBase Main Menu, click "Setup"

- Click "Users"
- Enter your personal password on the Administrator line (1st line). This will be your password for future Logins.
- You can change the Administrator's password at any time. This Administrator cannot be deleted, made inactive or have their authority changed.

- If you <u>do not</u> have additional Users, skip to step 3.

2. For multiple Users:,

- Enter the user's name on subsequent lines and check mark their authority. Each User name must be unique. If two or more users have the same name. Ex. Sue(1st user named Sue) and Susan(2nd User)

  Note: It is possible to have more than one User with full authority, but they do not have the authority to delete the master Administrator.
- The master Administrator should allow the User to key in their password. While password authorities are established to protect the church/organization from inappropriate actions by the Users, the User should also be protected from inappropriate actions taken by others using their password. People should not know other user's passwords. If someone needs access to the program, they should have their own password.

3. Go to Church Information on Main Menu

- Enter Church Name, address, Slogan, etc. ***Note* that the slogan, header and footer are used on the <u>Contribution Letter</u>** which is provided to the contributor**.** In the pre-loaded example, the footer also contains an underline and the words Church Secretary under it. You determine wording and presentation on Slogan, headers and footers. Provision is made for a logo (picture) to be used for printing on the Member's annual contribution letter. This is not required and is something that you may wish to do at a later time.
- Close (returns to Master Files Menu)

4. Go to Bank(s) Information on Main Menu

- Enter Bank(s) information. Everything on the Bank(s) Information screen is *optional* except for the Bank Name. <u>At least one Bank name must be setup in the Bank(s) Information screen.</u>

  Note: The transit Routing number is used by the banking system to identify your bank. It is usually the first set of numbers on your check reading from left to right. If you want the transit routing number to appear on your deposits, and you are not sure of the number to use, contact your bank. Also, displayed on the bottom of your checks are the bank account number and the check number.
- Close (returns to Master Files Menu)

5. Go to Bank Accounts Information on Main Menu

   (Multiple Bank Accounts are allowed. **<u>At least one is required</u>**)

- Select your bank name from the drop down list at the right of Bank
- Enter Account name (**required**)
- Enter Account number (optional)
- Enter QB Account name (Required only if you are using and plan to export to QuickBooks) (see QuickBooks Account Setup in <u>Suggestions</u> starting at page 14.)
- Close (returns to Master Files Menu)

6. Go to Fund Types on Main Menu

   (multiple Fund Types are allowed – see Suggestions starting at page 14.

- Enter Fund Type
- Enter QB Fund Income Account (Optional, unless you are using and plan to export to QuickBooks) (see QuickBooks Account Setup in Suggestions)

- Check or uncheck Tax Deductible box (This pertains to the contributor's tax deductibility). The contribution letter that you provide the contributor depends upon this being accurately marked.
- Close (returns to the Master Files Menu)

Close (returns to Main Menu)
This completes the Start up procedures.

Household and Membership information:

Select **Households** from Main Menu (allows you to add households and members)

1. Select **Add New Household** from **Households List** form
   Enter household information: This is the collective information pertaining to the entire household (family).

Household naming conventions:

- **Household ID** - this is used for identifying and sequencing the households. We suggest as a convention to maintain consistency, using the head of the households name as the Household ID. To avoid conflicts with heads of household with similar names, it is better to fully identify them. Last name should always be before first name.
  Examples: **Doe, John Edward**; **Doe Jr., John E.**; **Doe III, John E.**: etc. (**We strongly recommend using this convention for the Household ID**)
- **Household Print As Name -** this is used to print on certain household reports and household mailing labels. You choose how you want the names to be presented.
  Examples: John Edward Doe; John E. Doe & family; John E. & Jenny Doe (This presentation would be consistent with the way that you would address an envelope for mailing purposes.)
- Address, home phone, email address and anniversary (wedding) are self-explanatory.
- Status: Select the appropriate status from the dropdown box.*
- Group information can be added later. *See Groups Information* below. This is how you can group households into Deacon's lists, etc. Households can be placed in multiple groups.
- Check boxes are provided to allow for exclusion of specific household(s) and specific home phone numbers from the Church directories. Photos and User Defined Dates will be covered in the Version 3 Enhancements section starting on page 16.

2. Click "**Add New Members"** from the **Households Information** screen.

- Enter member information down through and including status*. This information represents **each** member individually. *Note* that the home phone number can be entered from the **Household Information** automatically by clicking the *"Copy home phone from household"* button.
- Envelope number (optional): Envelope numbers are used as a shortcut to find the member when posting contributions. Envelope number is a numeric value only. All unassigned envelope numbers will be presented as a 0 (zero). When it is necessary to remove an envelope number that has previously been assigned, just change the number to 0 (zero). The letter O will not be accepted. Do not blank out or use the delete key to remove the number.
- Group information can be added later. *See Groups Information* below. This is how you can group members into Sunday School Classes, Choir, Youth, etc. Members can be placed in multiple groups.
- Contributions will be added later from the Contributions screen.

- Check boxes are provided to allow for exclusion of specific member(s) and/or specific Cell phone(s) from the Member directory. Photos and User Defined Dates are covered in the Version 3 Enhancements section starting on page 16.
- Close

  * Status – *Both **Household Status** and **Member Status** are **important** information for preparing reports. They are available to be used in filters that will allow you include/exclude Households or Members on their associated reports.*

Groups' information:

Groups are used for selection of Household or Member lists. They provide a convenient way to produce selected reports. For example should you want to produce a list of Households that have been assigned to a Deacon, or a list of Members that belong to a Sunday School Class, or a list of members of the choir, and/or to exclude certain groups from the published Church Directories, etc. Individual Households or Members can be assigned to any group(s) that has been created within their classification.

Select **Groups** from the **Main Menu** (Establishes group definitions i.e. Deacon's, Classes, Choir, Youth, etc.)

1. To establish a household group - Select **Add New Household Group**

   Note: Household groups are useful for selecting specific groups for reports, labels, and datasheets.

- Enter group name. This establishes groups that households can be assigned to. Ex. Deacon John Doe's group
- Select households to be assigned to this group from the dropdown list at right. You can also add or remove Households from the group from the Households screen.
- Group lists or mailing labels can be preview/printed from this screen at any time during or after the groups have been created.
- The **View** button allows you to review, add or delete Households in the group.
- **Close** out when finished setting up your groups.

2. To establish member groups – Select **Add New Member Group**

   Note: Member groups are useful for selecting specific groups for reports, labels, datasheets, and are <u>required if you utilize Attendance tracking</u>.

- Enter group name. Ex. Adult 1 Sunday school class, Choir, Youth, etc. This establishes groups that individual members can be assigned to.
- Select members to be assigned to this group from the dropdown list at right. You can also add or remove members from the Members screen.
- Group lists or mailing labels can be preview/printed from this screen at any time during or after the groups have been created.
- The **View** button allows you to review, add or delete Households in the group.
- Close and reopen as often as you wish.

Contributions:

Record member's contributions (a specific contribution can be split between multiple funds).

- You can enter the date for a specific contribution, or utilize the <u>default date</u> for all contributions of a batch. When you change the date for a specific contribution, it has no effect on the default date. The default date will remain unchanged to be presented for all contributions which follow in the batch.
- Select the **Member** from the drop down box, or from the **Envelope** drop down box. If using the envelope number, enter the number and then press enter on your keyboard, or click any field, the member name will be presented
- Select the **Payment Type** from the drop down box.
- Enter the **Check Number** or **"*nnnn"** (last 4 digits of credit card number), if applicable. For cash leave **blank**.
- Select the **Fund** from the drop down box.
- Enter any **Memo** that you feel that you need for that line item of the contribution.
- Enter **Amount** that applies to that line item of the contribution. *Split contributions may be made and the total of the contribution will automatically update and be displayed in the* ***Contribution total*** *box. This is useful in assuring that the contribution is correctly recorded.*
- When satisfied with the recording of this contribution – advance to a new record by clicking the <u>**Next**</u> button to enter another contribution. You can also go back to prior contributions by clicking the <u>**Previous**</u> button. If you prefer, you can use <u>**Alt + N**</u> to advance and <u>**Alt + P**</u> to go back.
- You can close and return to the Main Menu at any time. You can pick up on unfinished recording, simply by selecting **Contributions** from the Main Menu. You can find a specific contribution record by using the Next Or Previous button to navigate through the contributions, or by performing a Search from this screen. The contribution records are stored in the order that you entered them. i.e. The lowest numbered records are the 1st that you entered, and the highest numbers are the most recent that you entered.
- Search: Select **Contribution Search** to find a contribution by a variety of ways. i.e. By contribution's *Search* **Date**, *Search* **Member,** *Search* **Check Number,** *Search* **Payment type** or Search **Amount**. Ex. Search for **Member**. Finds all contributions for that member. Then you might want to add additional search criteria such as check number for the contribution that you are trying to find. Each additional search criteria narrows the search to find the specific contribution that you are trying to find.
- Delete Contribution: Any <u>un-deposited</u> contribution can be deleted. This might be necessary when you find that you have entered a contribution twice. (When the un-deposited contribution contains an error, **it may not be necessary** to delete and re-enter the contribution in-order to make changes to that contribution. Simply, locate the contribution that needs to be changed and make the change.) If it is necessary to delete the contribution, use the <u>**Delete Contribution**</u> button**.** <u>Do not</u> just change the value to zero or blank. This will leave a zero balance record in your data. A zero balance record has the same effect as one with values. If you wanted to delete a member related to that record, you would not be able to until you delete that record.
- Deposited contributions cannot be deleted before first being removed from the deposit. Removing contributions from a deposit does not delete the contribution;

it simply removes a tic which then allows you to make corrections, or to subsequently delete the contribution record.

- *When you have finished entering contributions* and *you are ready to make the deposit.* **Click Close** (returns to Main Menu), then select the **Deposit** button on the Main Menu.

Deposits: Required for full utilization of program capabilities.

Add new deposit or view/change existing deposits. (The deposit function serves several important purposes, including protection from inadvertent changes to contributions, balancing and error detection assistance. **Funds reports are dependent on having completed the deposit process.**)

From the Main Menu click **Deposits**. This opens the Deposit List screen and presents a view of all existing deposits. At this point, you can create new deposits or select any deposits that need changes.

- **Add New Deposit** button: presents you with an empty deposit screen.
- Accept or modify the **Deposit Date**
- Select the **Bank Account** from the drop down box at right. (required before you can enter other deposit information)
- Comments (optional) enter as you deem necessary.
- **Select Contributions for Deposit** button: this will take you to a new screen (Un-deposited Contributions) where you can select the contributions that you want included in this deposit. More contributions may exist than are displayed on this screen. To see all contributions – use the scroll bar to the right. You may select all, un-select all, select individually or un-select individually.
- When you have finished your selection, click the **Add Selected Contributions to Current Deposit** button. This will return you to the **Deposits** screen. If you did not make any selections, Click **Close** (returns to **Deposits List** screen). The deposit is still open and further changes or additions can still be made. If you are satisfied with the deposit information, you can Preview/Print the Deposit Slip and/or the Fund Summary. Note: The Funds Summary report reflects only **contributions that have been deposited.**

- **View/Edit** button: selects a specific deposit to view or make changes and displays the existing deposits screen.
  Contributions can be added to or removed from deposits. *If you have a need to delete an entire deposit, you can, however the deposit number cannot be utilized again.* Generally, it is better to remove specific contributions from the deposit, make corrections to the contributions and then place the corrected contributions back into the original deposit, rather than deleting the deposit. Deleting deposits or removing contributions from deposits does not delete the contributions associated with the deposit. It simply removes the tic that indicates that the contribution has been attached to the deposit. The contributions are then available to be deleted, updated and re-attached to the original deposit, or attached to a new deposit.
- Changes can be made to Deposit Date, Bank Account, and Comments.
- Contributions can be added or removed from deposits.
- Print Deposit Slip (Summary & detail)
- Print deposit's Contribution by Fund report

Groups:

- You may wish to create Member groups such as Sunday school classes, Choir, Bible Study, etc; or Household groups which are assigned as the responsibility of specific members of your staff or responsible members. To create a group, you simply select the Group button on the Main Menu, select the appropriate Household Group or Member Group, type the name of the group into a new record and then select the desired Household or Member from the drop down list. After a group has been created, it is simple to add or remove from the group. This can be done from the Group screen or from the respective Household or Member screen.

Filters:

The use of filters allows you to control the content of non-financial household and membership reports, directories, labels and datasheets. Your database "FlockBaseData" contains many different types of data and of that data there will be some that you want to appear on reports and some data that you want to exclude. By using filters, you have the ability to exclude Households or Members from a given report based on their Status and/or Group assignment.

- For instance, you may have the need to present a report based on your membership, but you do not want to have the Previous Members, Deceased Members, or Visitors appear on the report. In this instance, you would select the Status filter which then allows you to select the Statuses that you want. Those Statuses that you do not select will not be presented on the report.
- Another example would be that you wanted to print a list only of the members of the Choir. To do this, you would select the Group filter. This presents a list of all groups that you have established. You would then select Choir from the list. Your report will then only present a list of members of the Choir.
- The Group filter and the Status filter also work in conjunction with each other. You may want your report, directory, mailing labels, mail merge, or email datasheet to include a specific Group or Groups and then further refine your selection to include only specific statuses in the group. This would be accomplished by utilizing both the Group filter and the Status filter. From the Group list, you would select the Group(s) that you want to use, and then from the Status filter you would select the Statuses that you want to be included.

Reports: Financial (all financial reports are date range based)

From the Main Menu - click Financial

Reports Preview/Print Financial

Allows selection of various Contribution, Deposit, and Pledge reports within date ranges.

Contributions:

- Contribution Summary:
  Date Received, Member, Payment Method, Check Number, Contribution Type, Amount, Sub-Totals by Date, Grand Total
- Contribution letter: Multiple presentations of the letter are available.
- Total by Household:
- Receipt:

Deposits:

- Deposit Slip & Detail:
- Fund Summary:

Pledges: See: Version 3 Enhancements starting on page 16.

- **Pledge Reports:**

Reports: Household (family)

From the Main Menu click Household (family)

Household Reports Preview/Print

Allows selection by groups and statuses of Households. For a complete list un-check all filter selections.

Households

- **Household Information**: This report contains information that might not ordinarily be provided to your members. It contains all households and members that have not been excluded through the use of group and status filters, as well as phone numbers whether checked to be excluded or not.
- **Directory – Text**: These reports contains information appropriate for distribution to members. It includes all household and members that have not been excluded through the use of group and status filters as determined by you. It further provides for the exclusion of information at the member's request. You can exclude the following from the directory by checking boxes on member setup:
- Exclude specific households or members
- Exclude specific household's or member's cell phone numbers

  You can change the check boxes at anytime on the Household or Member form.
- **Directory Exclusions report**. This report provides a reference list representing the households or members having any combination of the two exclusions above. It provides quick reference to all exclusions on a Household or Member basis.
- **Photo Directories**: See version 3 Enhancements starting on page 16.
- **Mail Merge:** See version 3 Enhancements starting on page 16.

Reports: Member

From the Main Menu click Members in the reports section.

Member Reports Preview/Print

Allows selection by groups and statuses of Members. For a complete list un-check all filter selections. See Filters on page 9.

Member reports consist of the following:

Member Information: This report contains information that might not ordinarily be provided to the members. *It contains all members that have not been excluded through the use of group and status filters, as well as phone numbers whether checked to be excluded or not.*

A. **Text Directory**. These reports contain information normally appropriate for distribution to members. *It includes all household and members that have not been excluded through the use of group and status filters as determined by you*. It further provides for the exclusion of information at the member's request. You can exclude the following from the directory by checking boxes on member setup:
   1. Exclude specific members
   2. Exclude specific Member's cell phone number

   You can change the check boxes at anytime on the Household or Member form.

B. **Directory Exclusions report**. This report provides a reference list representing the Members having any of the two exclusions above. It provides quick reference to all exclusions on a Member or Household basis.

C. **Directory - Photo**: See Version 3 Enhancements starting on page 16.

D. **Mail Merge:** See Version 3 Enhancements starting on page 16.

Email Datasheets both Household and Member:

(added with release of Version 2.0)

Available from Household Reports Preview/Print and Member Reports Preview/Print screens:

- The email datasheet provides an <u>easy source for email addresses</u> of Households or Members which can be copied (Ctrl + c) and then pasted to external applications such as Excel, Word or directly to the "To:" line of your email: You are provided the option of presenting all Household's or all Member's email addresses; or selecting specific email addresses using the following methods.

A. **Using the group function for email addresses.**

1. Email datasheets for groups that you have created such as Choir, Adult 1 Sunday school class, Youth groups, Deacons, Stewards, etc. are easily selected via the filters.
2. This selection can be used separately or combined with selection by status.

B. **Using the status function for email addresses separately or in conjunction with the group function**.

1. Determine inclusion of Households or Members based on their status. Example: Active status only, Non-member status only, Active <u>and</u> Non-member statuses, or any other combination of statuses.
2. This selection can be used separately or combined with selection by group.

C. **After determining who you want included:**

1. Press the "Email Address" button and you will be presented with a datasheet view of email addresses. You can review and used the datasheet contents as is, or close and further refine your selection. Note: If two members use the same email address, both will be presented. However, when you paste them to your email, only one will be sent.
2. When pasting to your email address To: line, you should only paste the email address. The names are provided on the datasheet only to aid you in recognizing to whom the email addresses belong.
3. If the email addresses presented are not exactly those for whom you want to receive an email, you may want to change your criteria for membership in a group or status in your Household or Member records. You can also, either delete or add individual email addresses in your Excel, Word or email To: line before sending your email.

Labels both Household and Member

(size 1" x 2-5/8" - 3 across - 30 labels per page)

Envelope reports: Members Only – Assignment lists

(envelope number, member's status, name & address)

- All Members - Member Name Sequence
- All Members - Envelope Number Sequence
- Current Envelopes Only - Member Name Sequence
- Current Envelopes Only - Envelope Number Sequence

Household's and Member's Datasheet: (Main Menu)

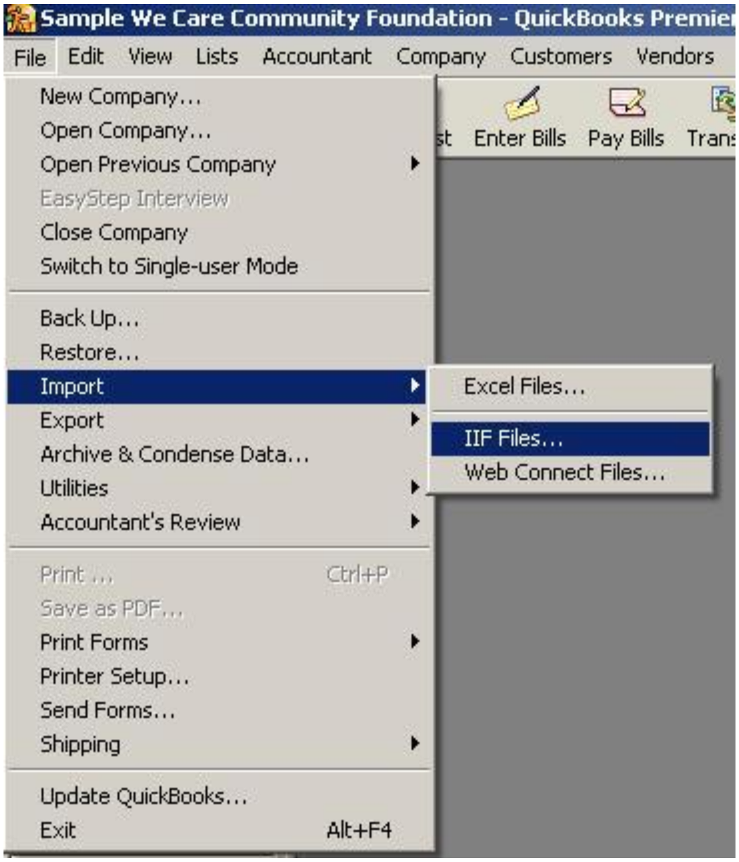
- These datasheets are available for reviewing detailed information of the Households and Members. You can copy information from these datasheets to Excel, Word, etc. outside of FlockBase. No changing, adding, or deleting can be done to these datasheets. To copy the data sheet, select (highlight) the entire data sheet and press Ctrl+c and then paste the selection to your Excel, Word, etc.

Exporting deposits to a QuickBooks compatible file:

From the deposit screen, select **Export to QB file**. The deposit will be exported to a file and a deposit export report will print. The file name and location are printed on the export report.

From within your QuickBooks software, select File, Import, IIF Files. Browse into the folder where the export file is located (C:\QBExport). Change the Files of Type Box to All Files. Select the desired export file and click Open. This will import the deposit into your QuickBooks file.

Example may vary depending upon which version of QuickBooks you are using.



Data Backup:

Please realize that backing up you data is very important. Computers can crash, files can become corrupted, etc., and computers can be stolen. It is much better to have backups that do not reside on your hard disk, so that you can store them safely away from your computer. Frequent backups can avoid serious problems. It is all too easy to trust that nothing will ever happen to your computer, but all too frequently people do suffer these types of catastrophic losses. It is much easier to backup and protect your data than to have to re-create weeks, months or years of data that you have entered.

Data Backup procedure: (Backup button added with release of Version 2.0)(improved with release of Version 3.0)

A Backup button is provided on the Main Menu (effective with release of Version 2.0) Before performing your first backup to a given location, create a backup folder(s) in the location(s) of your choice. This is to be done outside of FlockBase. For example, you might want to backup your data to a removable USB drive or other removable medium. You should think this through, and decide on the method to best safeguard your data. To save yourself the least amount of problems in the event of a catastrophe, you should backup after each weekly period's data entry. One convention that you might want to consider is to create five (5) separate backup folders and

to name each one to correspond to the Sundays of a month. i.e. 1st Sunday backup, 2nd Sunday backup, 3rd Sunday backup, 4th Sunday backup, and 5th Sunday backup. When you perform your backup, you would select the folder which corresponds to the particular Sunday of the month for which you had recorded your current contributions. <u>This would then allow you to have not only a current backup, but up to 4 additional backups. Each of the previous backups would contain less current data than the current backup, but would provide additional levels of protection.</u> For months which do not have a 5th Sunday, you would just not utilize the 5th Sunday backup.
To create a folder on your removable device, simply do the following:

1. Ensure that you have inserted your removable drive.
2. Click Start on your desktop, browse to <u>My Computer</u> (XP), or to <u>Computer</u> (Vista) and locate your removable drive.
3. Double click on your removable drive.
4. For XP – Click <u>File</u>, Click <u>New</u>, Click <u>Folder</u>, Type in the name for your folder.
5. For Vista – Click <u>Organize</u>, Click <u>New Folder</u>, Type in the name for your folder.

Once you have established your backup folders, anytime that you want to backup your data, you simply press the backup button on FlockBase's Main Menu. You will be asked "Are you sure that you want to make a copy of the database?" If you do not, select no and you will be returned to the main menu. If yes, you then browse to your chosen backup folder and Click OK. On subsequent backups to a folder which you have previously used, you will receive a message telling you that you already have a file by that name in the folder and you will be presented with an option to replace the old file. You would then select the option to replace the old file.
Please note: There is only one file that is important to your operation and that is the FlockBaseData file. The **FlockBaseData** file contains all of the information that you have entered from inception to date. Any of the other FlockBase related files can be recreated without problem and we will be happy to assist you. **Copying the FlockBase Icon on your desktop serves no purpose at all. The FlockBase folder on your computer contains a file named FlockBase. The FlockBase file is the program which allows you to perform the task. Do not confuse the FlockBase file with the FlockBaseData file.**

Data Restore/Transfer procedure:

(Catastrophic recovery or transferring data to another computer.)

Copy the FlockBaseData.mdb file from your backup location (settings on your computer determine whether or not the extension ".mdb" is displayed following FlockBaseData): Paste to: the path that you are using on your computer for FlockBaseData. For most users this will be: C:\FlockBase\FlockBaseData (settings on your computer determine whether or not the extension ".mdb" is displayed following FlockBaseData).<u>Think carefully about what you are doing before performing the Data Restore procedure. Pasting over your FlockBaseData file on your hard drive will replace your data.</u>

Data File Path: (added with release of Version 2.0)

This tells you the location of the data file that you are using, and provides a method to select a location other than the one that was selected at the time of installation.
<u>**Most users will *not* have the need to change the path**</u>. *Users who do not have a Local C drive, or who are on a network have the ability to determine where they want the data file to be located.* <u>**This should not be changed unless there is a definite need.**</u>

Suggestions

Offering Plate Contributions (Loose Plate, Unidentified Cash, etc.)

- You handle the plate offering in the same manner you would any other household and member. Setup a Household (non-human) and a Member (non-human) for Offering Plate. This provides you with a place to record the unidentified offerings and allows you to keep complete records.
  Household = *Offering Plate
  Member = *Offering Plate, *Loose Plate, *Unidentified Case, etc.
  Including the asterisk (*) as part of the name will sequence Offering Plate to the front of all households and members. The asterisk will also prevent this household or member from being presented on household/member lists and mailing labels. It only affects sequence on monetary reports.

Split contributions:

- To avoid confusion and difficulty in recording contributions properly, it would be best to ask your donors to provide separate checks for contributions that <u>must</u> be deposited into separate bank accounts. This <u>does not</u> apply to donations that are to be deposited into one bank account, but split between more than one fund. All split contributions from a member can easily be handled on the contribution screen at the same time.

Contribution Search:

- If you blank <u>all</u> search criteria, the search will return all valid entries including zero ($0.00) values. A blank (not zero) $ value <u>will not</u> be found. If you know that you have a blank $ value in a Member's record, you can locate it by selecting the member from the Member List and scrolling through the member's records. You can then view/edit that record and either correct the value or delete the contribution record.
- To find only zero $0.00 values contributions enter 0.00 in the amount selection field and blank out all other selection criteria.

Household naming conventions: (**<u>We strongly recommend using this convention</u>**)

- **Household ID** - this is used for identifying and <u>sequencing</u> the households. To avoid conflicts with heads of household with similar names, it is better to fully identify them. Last name <u>should</u> always be before first name.
  Examples: **<u>Doe, John Edward</u>**; **<u>Doe Jr., John E.</u>**; **<u>Doe III, John E.</u>**: etc.
- **Household Print As Name** - this is used to print on household reports and household mailing labels. You choose how you want the names to be presented.
  Examples: John Edward Doe; John E. Doe & family; John E. & Jenny Doe

Funds setup:

- **Enter the most frequently used fund as your <u>first</u> entry in the Funds table.** **(The first fund listed in the Funds table will be the default fund for each new contribution. The other funds can be accessed via the drop down list.)** Before you start recording contributions, you can change the names of the funds to suit your needs. After you start recording contributions, you can change a fund's name, but <u>not the meaning</u>. For example: "Bldg. Budget" could be changed to "Buildings Budget", but you could not change it to "General Offering". This would change the meaning of all of the previously recorded contributions. The QuickBooks account setup is optional unless you plan to export to QuickBooks.

QuickBooks Account setup: (*required only if you plan to export to QuickBooks*)

- The QuickBooks account(s) pertain to both your bank account(s) and fund(s) accounts. On the Bank Account setup and the Funds Account setup there are additional fields to enter the corresponding QuickBooks accounts. The establishment of the QuickBooks accounts is necessary for FlockBase to properly export to QuickBooks. The accounts in QuickBooks are defined as follows:
  <u>Major Account</u>:<u>Sub Account</u>:<u>Sub-Sub Account</u>:<u>etc</u>.
  The colons (:) are the separators between the account classes and are required.

Envelope number usage:

- This is an optional function. If you assign envelope numbers to members, you can select the member on the contributions screen by entering the envelope number or by selecting the member from the name drop down list. Envelope numbers can be reassigned at any time. They are only used as a shortcut to find a member when making a contribution. How you utilize this function is strictly under your control.

Deposit Function: <u>Very important function for full utilization of FlockBase</u>

- While you may not choose to utilize the printed "Deposit Slip Summary and Detail" for making a bank deposit, the process **<u>should be</u>** completed after entering contributions for any given period. The deposit function provides you with balancing totals, which when used properly allow you to balance the data that you entered on the computer with your adding machine or other totals of your contributions. The deposit slip detail is an aid in finding your error. If there is a balance error, you simply research your error, remove the erroneous contribution from the deposit, and make the necessary corrections. When you have made all known corrections, place the contributions back into the deposit, review and approve the corrected deposit, or go back through the process as many times as you need to ensure that all contributions were recorded properly. **The Funds Reports are only available for deposited contributions**. This is to ensure that the Funds reported agree with the monies actually deposited in the bank.

Funds control:

FlockBase provides you with the ability to create end of year contribution letters to your members, but it also is a tool in ensuring control of your funds. *If you record **all** contributions including loose cash* [see **Offering Plate Contributions (Loose Plate, Unidentified Cash, etc. above)**], you will have a tool that provides a way to ensure that the amounts counted, recorded in FlockBase, and placed in the bank agree.

Screen (Display/Monitor) Resolution:

- If you are unable to see a complete form on your screen, you probably have your screen resolution set to 800 x 600. You may want to change your Screen Resolution to 1024x768.

Questions and Answers: You can find these at www.flockbase.com

Version 3 Enhancements

Users/Passwords: The person setting up FlockBase for the first time will be recognized as the master Administrator. . The Administrator has the authority to setup any new users and establish their authority. This methodology is provided for churches or organizations which have multiple users. Some churches or organizations also need to restrict some users from financial information. Frequently, a pastor will want to see membership information, but does not wish to be exposed to the detailed financial information relating to the contributors. If you are upgrading from an earlier version, you will automatically be named Administrator, given Administrator authority and your password will remain the same.

Authorities:

a. Setup – this allows the user access to the Setup menu and allows them to create Users (see below), assign the other Users authority and to change anything in the setup.
b. Financial – This allows the user access to both Membership and Financial functions. It does not by itself allow the User to have access to the Setup menu.
c. Membership access only (no access to Financial or Setup functions) is provided when the User is setup without either of the other authorities.
d. When the Inactive box is checked, the user information does not change, but the user is not provided an opportunity to Login to the program. The inactive check mark must be removed before the user can utilize the program.
e. Users cannot be deleted from the program. A record of all users' access to the program is recorded in an Access Log which is available for review from the Setup & Maintenance screen.

Users and Passwords:

- From the Main Menu select "Setup"
- From the Setup and Maintenance menu select "Users"
- The initial Administrator will be represented on the first available line.
- On subsequent lines the Administrator can setup other users and assign their authority. If it is appropriate, the Administrator can give full authority to another User. The User names must be unique.
- The Administrator should allow the User to key in their password. While authorities are established to protect the church/organization from inappropriate actions by the Users, the User should also be protected from inappropriate actions taken by others using their password. People should not know other users passwords. If someone needs access to the program, they should have their own password.

Attendance:

Attendance recordkeeping and reporting are based upon having previously assigned members to groups.

Recording Attendance:

1. Click "Attendance" on the Main Menu
2. Select the Group from the Group drop down list.
3. To avoid having to set the Event Date for each group for which you are recording attendance, you can set the date to be used for this period by changing the Default Date.

This date will then be available for all subsequent group events. If you change the Event Date in the box rather than the Default Date, the date is only changed for the current group and will revert to the Default Date for subsequent groups.

4. The Event Memo is restricted to a very small number of characters. This will appear on some reports and generally would be used to make note of some special occurrence.

5. To avoid having to select the members individually, there is a button which will select all members of the Group (Copy Attendees from Group Membership). <u>When members are selected in this manner, they will all be marked as present.</u> This allows you to remove the check mark for those absent rather than have to check mark each person who is present.

There is also a button (Copy Attendees from Previous Event) which you <u>may</u> choose to use subsequently which will bring forward only those members who were represented on the previous period. <u>When this button is selected, those members will be marked as they were on the previous event. If they were absent on the previous period, they will be marked as absent on the current event</u>. If the member who was absent on the previous period is present for the current event, you would need to mark them as such. Using this function any new group members would initially have to be manually added to the attendance roll. You would do this by scrolling to the blank line at the bottom of the list and selecting the member from the dropdown list which reflects all members in the database.

6. You are not restricted to the group when recording attendance. Should you have someone in attendance for this event who may be visiting from another class, you can add that person from your general membership. You would do this by scrolling to the blank line at the bottom of the list and selecting the member from the dropdown list. If that person does not return the following week, you have the option to mark them as absent or remove them from the attendance roll.

7. Removing (Dropping) a member from the attendance roll is accomplished by clicking the Delete button by the member's name. This does not delete the member from your database or from the group; it only removes them from the roll. They can be added back at any time by scrolling to the blank record at the bottom of the list and selecting them from the dropdown list. If you utilize the "Copy Attendees from Prior Event", members who have been dropped from the roll will not be added back, but the temporary members will continue to be on the roll. If you utilize the "Copy Attendees from Group Membership" button, the member of the group who had been removed will be added back automatically, but members who have been temporarily added to the roll will not be added back. To remove a member permanently from the roll, you would need to remove them from the Group via the Main Menu Group screen or Member screen.

8. Should you ever decide that you needed to delete a specific Group Event, you would first have to remove each member from that particular event. This might arise if you discover that you had inadvertently recorded the same Group Event two times.

9. When you have completed the recording of attendance for a Group Event, you can:

a. Print an Absentee report (optional) "Absentee Report" button

b. Proceed to the next Group Event "Next Group Event" button

c. Review and/or make changes to prior Group Events "Prior Group Event" button

d. Close (you can "Close" during processing and return later to finish processing.)

When you return, you will be returned to a new record Group Event. If you wish to continue processing the event that you left un-finished, you would select the "Previous Group Event" button which would take you to the last event that had been entered.

10. You can review and make changes to any Group Event. You can use the "Previous Group Event" button and the "Next Group Event" button to navigate through the records.

Attendance Reports:

- Absentee Report – Current Group Event only – This report is available directly from the Attendance recording screen. It may be printed when the recording for that Group Event is completed. It can also be printed for any Group Event previously recorded.
- Attendance Report – By Event Date, By Group. Three column list. This report is controlled by the date range that you set. If you only want a report for a specific period, you would set the beginning and ending dates to the same date. If you want the report to include several periods, you would set the beginning date to the first period that you wanted to include and the ending date to the last period that you want to include. All events within that range would be presented.
- Attendance Roll (used for recording attendance at the event) Displays up to 14 periods based on date range. You have the option to continue adding events on an ongoing basis by adjusting the begin and end dates for the report or starting a new report series by setting the new beginning and ending dates to a later point in time. This report provides a visual image to the person taking attendance, of the previous attendance. It is obvious to see that a person has been absent frequently or recently. This may assist the group in determining whether or not there should be follow up with the member.
- Attendance Spreadsheet (Recorded Attendance) Displays up to 14 periods based on date range. This will accommodate one quarter of Sundays, one month of twice-weekly events and one year of monthly events before it is necessary to change the date range and start a new series of events. As in the Attendance Roll above, you have the ability to continue the range by changing the beginning and ending dates associated with the report. The visual effect is similar to the Attendance Roll in that you can see the selected range of attendance.

Pledges:

In order to ensure that pledges are properly recorded, FlockBase pledge recording requires that "Master Pledge" criteria be established before entering pledges by Members. Once the Master Pledge is created, the individual member pledges can be setup.

- All pledges are tied to existing Funds.
- Funds can have multiple Master Pledges, but the pledge periods cannot overlap. For instance, you could setup a Master Pledge named "Building Fund" and set the pledge period as 1/1/2010 through 12/31/2010. Later you might see the need to establish another Master Pledge named "Building Fund Phase 2". Both of these pledges are associated with the fund "Building Fund". As long as their pledge periods do not overlap, there is no problem. If you try to create the second Master Pledge with dates that overlap with the first Master Pledge, you will receive a warning and FlockBase will not allow you to setup the second pledge until you have resolved the date issue.
- All Pledges must have a beginning and ending date.
- The period for the Master Pledge can be as long or as short as fits your needs.
- The Member's pledge period within the Master Pledge cannot start before the beginning date or after the ending date of the Master Pledge.
- A Member can make a pledge for a period less than the entire Master Pledge period. The member's pledge can start or stop at any point within the Master Pledge period.
- The Member's initial pledge period defaults to the Master Pledge period to reduce the amount of keying necessary to setup the member. If the member's pledge period differs from the Master Pledge period, you simply change the Member's pledge period.

- Within a Master Pledge, members <u>cannot</u> have multiple pledges to overlapping periods. There is a provision whereby a member can change their pledge in a Master Pledge.
- Changes are allowed to all aspects of a specific pledge. Should you choose to extend the period for the Master Pledge after the Member Pledges are established, you <u>might</u> want to extend some or all of the Member Pledges, if appropriate.
- The following example will show how Pledges are setup and how they can be changed.

  In this example, a complete pledge setup will be created for "Building Fund" which was established for the building of a church annex whose construction is to begin on January 1, 2011 and to be completed on August 15, 2011. The church plans for the building to be paid in full by December 31, 2016.

  - Select Pledges from the Main Menu
  - On the first available empty line of the "Pledges – Master Setup" screen, enter the following:
  - Name of Pledge: Church Annex
  - Select the Fund associated with Pledge from the dropdown list: Building Fund
  - Enter the Begin Date: 5/1/2010 note that the pledge date started well before construction is to begin on the church.
  - Enter the End Date: 12/31/2016 The Master Pledge is complete, now we start to enter the member's pledges that are associated with the Master Pledge.
  - Click View/Edit on the line which you just completed. This will take you to the member Pledges screen. This screen will have the master information: Pledge Name (Church Annex), the default dates for the beginning date 5/1/2010 and the ending date 5/1/2010 of the Master Pledge.

    At this time our example will involve 3 members who have different intentions for their pledges. Bob wants to pledge $20 weekly for the entire life of the pledge. Tom wants to pledge $300 monthly for the first year of the life of the pledge and then change his pledge to $500 monthly for the remainder of the pledge. Harry has pledged $100 per quarter for the life of the pledge, but 9 months later he suffered financial reversals and does not feel that he can continue at his original pledge level. He wants to change his pledge to $50 per quarter, but not affect the pledges to which he has previously committed.
    A blank line will be presented for entering new Member information and a new blank line will be presented after having entered the Member's data.

  - Bob – Select Bob from the Member dropdown list.
    Select Weekly from the Frequency dropdown list.
    Enter $20 in the amount field (note that his Begin and end dates are filled in automatically and in his case do not need to be changed. Bob's pledge entry is complete.
  - Tom – Select Tom from the Member dropdown list.
    Select Monthly from the Frequency dropdown list.
    Enter $300 in the amount field.
    His beginning date is already filled in and is correct.
    His ending date is filled in, but needs to be changed to 4/30/2011. The first portion of Tom's pledge entry is complete.

Now to prepare the second portion of his pledge:
Select Tom from the Member dropdown list. At this time you will receive a warning that he already has a pledge covering his default period dates. Since you have already changed the first portion of his pledge's ending date, click OK and change the beginning date on the second portion of his pledge to 5/1/2011 and his pledge is complete.

- Harry – Select Harry from the Member dropdown list.
  Select Quarterly from the Frequency dropdown list.
  Enter $100 in the amount field.
  His beginning and ending dates are correct. Harry's original pledge is complete.

  Around late February 2011 Harry experienced a financial setback and asked that his pledge be changed to $50 per quarter on a going forward basis.

  Scroll down to Harry's existing pledge
  Change his pledge ending date to 2/28/2011
  Scroll down to the blank line below all of the member's pledges.
  On the blank line, select Harry from the Member dropdown list. At this time, you will again receive a warning that Harry already has a pledge for the period. Again, since you have changed his pledge ending date, click ok and change his new pledge's beginning date to 3/1/2011.
  Select Quarterly from the Frequency dropdown list.
  Enter $50 in the amount field. His modified pledge is complete.
  Your reports will reflect the amounts that he had pledged up to the change and will reflect the new amounts through the end of his pledge period.

Pledge Reports:

Pledge reports are date range based as are all financial reports. These reports can be produced for a specific Master Pledge, or for any combination of Master Pledges. The annual or periodic "Contribution Letter With Pledges" will reflect all pledges and contributions for the period covered by the letter.

If multiple Master Pledges are selected for the following reports, multiple funds will be presented and each fund will be totaled.

If you set the Report's beginning and ending date to correspond with the selected Master Pledge's beginning and ending dates, any contributions that have been recorded will be presented for that period.

For reports which include contribution information, if the report's beginning date was sometime last year and the ending date was sometime this year, the report would include contributions for last year and this year within the date range. This type of selection allows you to see the entire pledges and contributions for the Master Pledge.

Reports:

Pledges and contributions only for members with pledges:

- **By Member** – This report only presents Members who have pledges in effect for the period. Members who do not have pledges are excluded. Member's contributions, pledges and percent completed by fund are presented on the report.

- **Summary** – This report utilizes the same data as the "By Member" above, but summarizes the report to the funds level. Individual members are not listed, but their contributions, pledges, and percent completed are included in the fund's totals.

Pledges and contributions for all contributors:

- **By Member** – This report presents all members whether or not they have pledges. Member's contributions, pledges and percent completed by fund are presented on the report.
- **Summary** - This report utilizes the same data as the "By Member" above, but summarizes the report to the funds level. Individual members are not listed, but their contributions, pledges, and percent completed are included in the fund's totals.

All Pledge Funds:

- Summary – This report presents all Funds. Within each fund the frequency (Weekly, Monthly, Quarterly, and Annual) of pledges is presented and within each frequency the members are a presented. The member's pledge per frequency is displayed along with the total that the member has pledged for the period of the report. While the report period might end before the Member's pledge is complete, the report does display the actual begin and end dates for the member's pledge. The pledged totals represent only the pledges which fall within the report's beginning and ending dates. It does not present the pledged totals which precede or follow the reports beginning and ending dates.   If you have selected a specific Master Pledge, you can easily set the reports beginning and ending dates to correspond to the Master Pledges beginning and ending date. When you do this, you will be presented with the total picture of the Master Pledge. If you are only concerned with what is pledged for a shorter time, such as the current quarter or the current year; by setting the report date to reflect that time frame, you will see what is pledged for that time frame.

User Defined Dates/Date labels: FlockBase has two dates which are built into the program. These are Birthday and Wedding Anniversary. There are five user defined dates for Households and five dates for members. You might want to create a date label that represented Baptismal date or Confirmation date or Joined date, etc. You create the label name for the dates, and that label will remain with the date from that point on. Most users will find that they may only need one or two additional dates, but five dates should satisfy all users. It is not necessary to utilize any of the dates, if you do not have a need for them. If you do have a need for an additional date or two, it would be a good idea to think them through thoroughly before assigning the label to the date and using it. If you establish a date's label and later wish to change it, the degree of difficulty would be relative to how many times you have recorded dates to members or households. Changing the name of the date's label is simple, as long as the change does not change the meaning of the date. In this case, you would only change the name and there would be no consequence. However if, you change the name of the date's label and are also changing the meaning of the date, you would then need to go to each affected Household or Member and change the dates that you had already assigned to the Household or Member. The date's label name is limited to ten (10) characters. It is possible that you might need to abbreviate the name, but generally that should not be the case. Names like Joined, Baptized, Confirmed, Left, Moved Away, Death, etc. would define the date appropriately and fit within the 10 character limitation. Currently, these dates are only presented on the Household screen, the Member screen, and the date reports; and not on the other membership reports.

Creating a date's label:

- Select "Setup" on the Main Menu
- Select "User Defined Labels" on the Setup and Maintenance menu.
- Enter the name that you want to be associated with the date in the first available box for either Households or Members as the case may be. If you have additional dates that you wish to define, enter their names in the subsequent boxes. You can then close the User Defined Labels process and go to any Household's or Member's (as the case maybe) screen and see how and where the date's label is presented. The dates as assigned will print on the date reports horizontally in the sequence that is presented on the User Defined Labels setup screen (A-E). It therefore is probably better to assign the names consecutively from A through E and leave the empty labels to follow.

Report's - Temporary Sub-Title: The membership reports have titles, or are recognizable by their content, but when you filter the reports they do not tell you what has been included or excluded. "The Report's – Temporary Sub-Title" allows you to provide additional definition to the report. This is purposely a temporary sub-title to aid in not inadvertently carrying the name over to a subsequent report which is totally different from the one for which you had set the sub-title.

- As you are creating the filter(s) for a report, you can determine that information which best describes the report that you are about to print.
- At that point, you can key the sub-title into the area provided.
- When you select the report that is being filtered to be printed, the report will pick up the sub-title and uses it on the printed report. In some cases, it will appear only on the cover page, in other cases it will appear on both the cover page and the heading of the detail pages. On reports for which there is no cover page, the sub-title will appear on the heading.

Date Reports (lists): There are two date reports specifically for Wedding Anniversaries and two date reports specifically for Birthdates. The other date reports represent all dates (including Wedding Anniversary and Birthdates). The Dates list can be filtered in the same manner as other membership reports. Filtering makes it easy to prepare a Birthday list for various groups such as a Sunday school class which contains only information for that group.

Member date reports:

- **Birthday-M/D/Y Seq. 2 col.** – This report presents a two column report listing the members under the birth Month in the order of birth Day and then birth year within the day. All twelve months are represented on this report and the complete birth date is presented.
- **Birthday-M/D Seq. 2 col.** – This report is identical to the above report except that it does not present the year of birth. Generally, this would be a report that would be distributed to a group such as a Sunday school class.
- **Dates-Member Sequence** – This report presents all dates which are in use horizontally across the page and the report is in member name sequence. The complete date is presented for all dates (m/d/y).
- **Dates-Member Age Sequence** – This report presents all dates as above, but presents the members age as well. The report is in the sequence of youngest to oldest. The complete date is presented for all dates(m/d/y).
- **Dates-Birth M/D Sequence** – This report presents all date as above, but groups the members by birth month and then sequences them by birth day. The complete date is presented for all dates(m/d/y).

- **Dates-Birth M/D Seq.-Page Break** – This report is the same as the above report except that it page breaks on Month of birth.

Household date reports: These reports are identical in function to the Member date reports, except that they use the Wedding Anniversary in place of the Birth date. For instance, The Dates-Anniversary Years Sequence presents exactly like the Dates Member Age Sequence report, but presents how many years married rather than age, and presents Household's User Defined Dates rather than Member's User Defined Dates.

Photo Directories: Photo Directories are provided for both Households (families) and Members. These directories can be produced for the entire church/organization and/or for groups that you have established such as Sunday school classes. Photo directories of the members of a Sunday school class are a great way for new members to become acquainted with the class. Filters allow you to utilize the existing photos from the general population while selecting who you want to be included in the directory.

Both Household and Member screens provide a "Select Photo" button which when clicked will open a screen from which you can browse to you Photo Folder(s). The source for the photo directories is the photo which you link to the household or member. After the photos have been linked, you will be able to print the Photo Directories. The option for landscape or portrait directory printing is provided for both Household and Member directories.

The Household screen has provision for creating special titles for the photos in the Household (family) directories. If the photo title (two lines available) is not used, the default title will be the household's "Print As Name" which might be similar to this "The John Doe Family". The photo title provision would allow you to use "John and Mary Doe, Robert, Betty and Willy" or perhaps "John, Willy, Robert, Betty and Mary Doe". The second example might represent the order that the Family is portrayed from left to right in the photo. Text directories are also available, to be used in conjunction with the Photo Directory. The Text directories provide Household/Member information for the Household Directories, and Member information for the Member Directories.

Simplified list of the steps to create Photo Directories:

- Take photos of your Households(family) and/or photos of the individual members of your church/organization.
- Transfer the photos to your computer and place them in a folder or folders appropriate for the type of directory you intend to produce. (Detailed suggestion for folders below)
- Link the Photos to the Households and/or Members
- Print Photo Directories

Considerations and steps to take to create your Photo Directories.

- Samples of the various directories are provided on the FlockBase website which will aid you in determining the format that you want to use.
- You should experiment with a limited number of photos. For practice and testing you can use a single landscape photo and a single portrait photo that you take for the purpose of testing. You can link the same photo to a number of different Households or Members that you want to use for the testing. Photos are only linked to your program and can easily be dropped. One reason that you might want to use the same photo for testing would be to determine the distance between the camera and the subject and another reason would be to determine the resolution of the photos. The higher resolution photos are greater in size and slower to process.

- If you determine that you were too far away when taking the picture or that the resolution was too great, you can simply take another photo and replace the other. When doing this, it would be wise to give the original photo a name and use that same name for the new photo. This would avoid having to re-link all of your test Households/Members.
- After you have determined the resolution for the photo and the distance from the subject when taking the pictures, you might want to ensure that you use the same for all pictures that you take. This will help you assure consistency of the presentation in your directories.
- You may want to experiment with both landscape and portrait photos utilizing the appropriate option as provided by the Directory selections. Portrait photos present more photos per page than Landscape photos, but you may find that you prefer the appearance of the Landscape photos for the Household directories, or that you prefer the appearance of the Portrait photos for the Member directories.
- If you decide that the Landscape directory presentation for Households (families) best suits your needs, then you should take all of those photos in Landscape mode. Mixing landscape and portrait views of pictures in a directory will not present a uniform directory. By the same token, if you decide that the Portrait directory presentation for Members best suits you needs, then you should take all of those photos in Portrait mode.
- You might want to create separate folders on your computer to place the photos into, such as “Household Landscape”, or “Household Portrait”, “Member Landscape” or “Member Portrait”
- When you take the actual photos for your directory, it might be useful make a list, and record each Household and/or in the case of separate Member photos, record the member. You might choose to use a preprinted list of the Households and/or Members for check off purposes, so that you know who has not yet had their photo made.
- Naming your photos that you place them into the folders will make it much easier to determine which photos need to be linked to which Households or Members. The above lists might aid you in this.
- According to the number of pages in your directories, you might decide to print all of the directories necessary to provide to your families or groups, or you might choose to print a single copy of the directory and have a copy store print the number of copies that you need.

Photo Linking: After you have placed your photos into the folders that you created on your computer, you are ready to link them to your Households and/or Members.

Households:

From the Households List screen:

- Select the Household for which you want to link a photo by clicking View/Edit beside the Household name.
- Click the “Select Photo” button
- Browse into the folder where the photo is stored
- Click on the photo.
- Click “Open” - The photo will then be displayed on the Household screen.
- At this time you can enter the desired photo title or if you choose, you can enter the photo title at a later time.
- Repeat these steps until you have linked all photos to your households.

Members:

From the Members List screen:

- Select the Member for which you want to link a photo by clicking View/Edit beside the Member name.
- Click the "Select Photo" button
- Browse into the folder where the photo is stored
- Click on the photo.
- Click "Open" - The photo will then be displayed on the Member screen.
- Repeat these steps until you have linked all photos to your households.

Remove Photo Link: If you have linked a photo to a Household or Member that should not have a photo, you can remove the link by:

- Click the "Select Photo" button
- Click "Cancel" on the browse screen, or press the "Esc" key on your keyboard.
- "A file was not selected" will appear.
- Click OK and the link is removed.

Text Directories: Text Directories are provided for both Households (families) and for Members. These directories can be produced for the entire church/organization and/or for groups that you have established such as Deacon's lists, Sunday school classes. Filters allow you to select who you want to be included in the directory. These directories can be used in conjunction with the Photo Directories to present more information. Usually, when producing a Photo Directory, you would want a Text Directory included as part of the complete directory package. Normally, the Text Directory would contain the same Households/Members that were in the Photo Directory, however, if you do not have a photo for a specific Household/Member, they will not be presented in the Photo Directory. After printing the Photo Directory, you can print the Text Directory (using the same filter criteria as used for the Photo Directory) which would include the information about the Household or Member that did not appear in the Photo Directory for lack of a photo.

Mail Merge datasheets: Provided for Both Households and Members. These data sheets provide information that you can copy into a spread sheet of your making. It is filtered in the manner that you determine, so that you can include only certain Groups or Statuses.

- If you do not filter the Households or Members before selecting the Mail Merge datasheet, you will include all of the Households or Members in your database.
- As is the case with all filterable reports, you can select specific Statuses, and Household/Members who belong to certain Groups.
- After you have determined which who you want in the Mail Merge data sheet, click the Mail Merge data sheet button.
- The datasheet is presented.
- Select (highlight) the data sheet, either by Clicking on the upper left area of the data sheet; or by clicking on a column (usually the first) header then holding down the Shift key and pressing the right arrow on your keyboard until all of the data sheet that you want to acquire is highlighted.
- To copy the datasheet to your spreadsheet, hold down the Ctrl key while pressing the C key on your keyboard. Ctrl+c
- Open your spreadsheet and paste the datasheet into the spreadsheet.
- If necessary, any other refinement would be done in your spreadsheet.