Subscriber program user manual

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Uses

The program can be used for:

- Storing names and addresses of organisation members.
- Debiting members with subscriptions according to member type.
- Crediting members when subscriptions are paid.
- Producing printed and email invoices for members.
- Sorting and listing members according to various criteria.
- Sending emails to selected members.
- Producing simple form letters for email or printing.
- Printing labels of selected names and addresses.
- Recording donations made and producing receipts

Program Structure

All data that the program uses is stored in simple tab delimited text files. Files are stored in a sub folder of the one that contains the program (called Members.exe). The following files are used:

- Members.txt is the main file containing all names and addresses
- Subscription.txt contains a list of subscription transactions linked to the main file by the member number.
- Donations.txt contains donations the members have made.
- Members.ini contains setup information about various aspects like member types and subscription rates.
- The Scripts folder holds text files defining invoices, receipts and for letters.

The program is stand alone and needs no external modules nor does it modify the Windows registry. This makes it suitable for installation on a USB drive and easily transported from one computer to another. It can be regarded as a portable application.

Installation

Copy the Members.exe file to a location on your computer or USB drive that you have read and write access to. When the program is run it will create subfolders for the data. Note that Windows Vista may not allow writing to files in the Program Files folder. For installation on your computer it is suggested that you create a folder called "Subscriber" and copy the members.exe there.

Getting Started

When you first start the program you will see a window with no data. Choose File/New List from the menu at the top to create a new member list. A screen like this will appear:
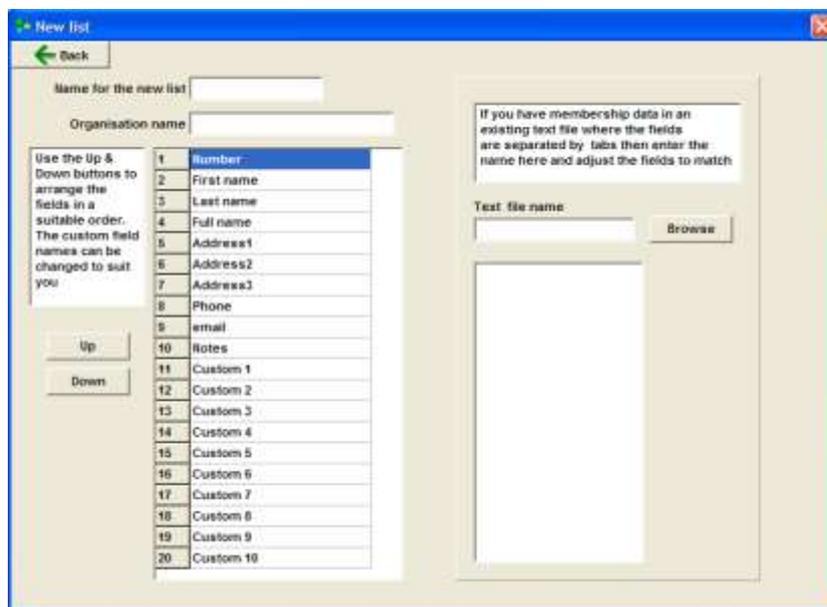
Enter a short name for your list and the name of the organization that it is for. The organization name will be used for headings on reports etc.

A list of twenty fields is shown on the left and these can be accepted as is or the order changed by clicking on a field and then the "Up" and "Down" buttons. The custom field names can be changed but not the others .

If you have data from other programs in a tab delimited file (can be produced from Excel etc.) it can be used as the basis of your new list. Browse to the file name and the first line will be displayed in the right hand box. Adjust the fields on the left to match the positions of the data on the right.

Click the "Back" button and as long as list name is present a new list will be created.

Click the "Setup" item on the menu and on the Subscription tab set:

- The member types and the subscription that each will be charged.
- The month and day that the organisation's financial year begins.

On the Organisation tab set:

- The name of your organization
- The start date of the financial year

On the email tab set:

- The SMTP server name for your email. This is the name your Internet Service Provider uses to send mail. There is a default setting for Xtra in the program. You can find others by looking in the Tools/Accounts section of your email program.
- The address you want emails to be replied to (probably your normal email address)
- If your email server requires authentication then enter your user name and password. It seems that in most cases this is not needed for sending mail but only for receiving it.
- Some ISP's limit the numbers of messages that can be sent at once. Set the maximimum number to something less than this limit.

You are now ready to begin using your list.

Adding new members
Click the "Edit" button at the top left and then the " New" button in the middle of the edit window. Enter the relevant details and click the "Back" button.

Changing the data viewed on the main screen
Choose View/Columns from the main menu and click in the box beside the headings you want displayed. Click the "Back" button to return to the main screen. Adjust the column widths on the screen by dragging the boundary between columns on the header at the top.

Changing member details
Member details can be viewed and edited using a form.   To edit click the Edit button on the main screen or double click on a members name. All fields may be changed except the member number as this is used to link to subscription information. The "Enter" key can be used to move to the next field . Use the "Next' and "Previous" buttons to move to other members in the list. The "Delete" button will delete a member and the "New " button create space for a new one.

All data will be automatically saved when the program ends.

Deleting or archiving member records
Right click on the member name and choose "Archive" to remove from the main file or "Delete" to remove permanently. Archived records can be recovered by choosing File/Retrieve from the main menu and then clicking the name to be restored.

Debiting subscriptions
Choose "Setup" form the menu and click the "Subscriptions" tab. Set the member types and subscription rates in the top left box, choose the date subscriptions are due and click the "Allocate annual subscriptions" button. This will cause a transaction to be added to the subscription file for each member that has corresponding entry in the "Type" field.

Crediting subscriptions
Navigate to the desired member by scrolling or using the search function on the main screen and either double click on the member or click the "Edit" button. Enter the amount paid in the box

provided or choose from the stored list and click the "Paid" button.   To delete an entry right click on the line and choose "Delete".

Sorting

The member list can be sorted by any data currently displayed. Click on the heading at the top of the screen to sort by that field. All sorting is done in ascending order.

Selecting members

Selected members are shown with a tick in the box to the left of their name. This selection can be used for Invoicing, listing, labeling and emailing groups of people.

 Members can be selected:

- Manually by clicking on the box beside the name
- Automatically by clicking the "Auto Select" button and then choosing the parameters needed. Note that clicking the "Select" button will override any manual selections made. In the Auto select window set the criteria for your selection by clicking in the squares beside the various options and then the "Apply" button. Once you are satisfied with a selection you can give it a name and store it with the "Save" button. Stored selections can be retrieved by choosing the name from the drop down list at the bottom right.

Searching

In the main screen you can search for members by typing an entry into the search box on the left and then clicking the "Find" button. The search is made starting at the currently selected record and looks for the combination of characters in any part of a record. There is a second search box in the "Edit" window and here the search always starts at the first record and a switch is available to search for record numbers only.

Creating scripts for forms

Invoices, receipts and form letters are produced by a form designer accessed via the Reports screen. Choose Reports and the appropriate button and a screen like this will appear.

The left hand box contains the script with commands for creating the output on the right, the middle box contains the possible keyword.

Commands consist of a keyword followed by two numbers separated by commas. The first number is the millimeters from the left of the printed page and the second the millimeters from the top of the printed page. Graphic commands have four numbers giving a start and end position.

If the keyword entered is not recognized as command it will be printed as is, in this way simple letters like the sample above can be created.

The script can be edited directly or a command can be selected from the centre section and then placed on the output by clicking the desired point.

The keywords are:

- Font   The name of the font to change to. Note that changes to the font or size affect all further lines in the script regardless of where they appear on the page. In this case no positioning numbers are relevant but the font name follows the keyword.

- Size   The size of font to use

- Number   The tax invoice number

- Date   The current date

- Name   The members full name

- Address   Three lines of address

- Horizontal   A line across the page starting at the position given

- Vertical   A line down the page starting at the position given

- Box   A box is drawn on the screen with the fist pair of numbers defining the top left and a second pair the bottom right

- Line   A line beginning at the first two number and ending at the second two

- Bitmap   If the command consists of a file name containing an image in bitmap form (*.bmp) it will be placed and sized according the four numbers following it.

- Balance   The amount owing

- GST   The GST to be added to the amount

- Includes   The GST component of a GST inclusive invoice.

- Total   The total amount owing

- Member   The members number

- <Field name>   The contents of the field named inside the brackets.

Commands can be entered directly into the script or by clicking on a keyword and the place it is to go on the form. Items placed on the form can shifted by dragging the top left corner.

Producing invoices, receipts and form letters:

Click the Select button on the main screen and then select the recipients. Click the appropriate button and either select an existing script from the drop down list at the top or create a new one. Edit the script according to the instructions above and choose whether to send to the current member or all selected members. Click either the Print or Email button and the forms will be produced. Emails will only be attempted for those members with valid email addresses and will be sent one at a time.

If the form is less than half a page high two or more will be printed per page.

Printing lists

Select the people to appear in your list and then click the "Lists" button. Click the "Lists" button and a window will appear with a sample report. Use the controls on the left to choose which fields to show. Drag the boundaries between the headings to change the column widths. Click the "Check box" square to draw a small square in front of each line, this is useful to produce check lists of members.   The left hand margin can be set and the font changed with the controls at the bottom of the screen.   The list can be printed or exported to a ".csv" file that can then be opened with a spreadsheet or text editor.

Printing labels

Make a selection of the people for which you want to print labels and then click on the "Labels" button in the main window. Use the controls on the left to change the layout to suit the labels. Note the printed layout may differ slightly from that shown on the screen so it is a good idea to print a test page on plain paper before printing the labels.

Use the drop down lists at the bottom of the screen to control which fields will be printed on the label. Use the "Join" check box to append the second field to the first. This is useful for printing first and second names on the same line.

Output will be vertically centered on the label.

To leave some blank labels at the top of the page enter a number in the control provided, this is useful for using partly used sheets of labels.

Sending emails

Use the "Select" button to choose the recipients for your message and then click the "Email" button.

Construct your message in the area provided on the "Message" tab and add any attachments. If you are sending to multiple recipients you can choose to:

- Send one by one which will send an individual message to each person. This is the most secure technique as if any addresses are rejected the program will carry on the next and you will be informed of the problem. However it is slow for big numbers of recipients and uses a lot of bandwidth if there are attachments.
- Send in batches which will group recipients according to the maximum size set in "Setup". Addresses are then put in the Blind Carbon Copy field and sent. This is fast but if any addresses are rejected the whole batch will be rejected.

Use the "Export addresses" button to copy groups of addresses into the clipboard. You can then post the addresses into any other email program for transmission.

Security

All data is automatically saved when the program closes but can be saved at any time by choosing File/Save from the main menu. Backups of the data can be made by choosing File/Backup. Data can also be sent to any email address by choosing "File/Send data" from the menu, this is a good form of backup because a copy of the data is stored away from your computer.

Field names

There are nine fields created by default when a new list is formed, they are:

Field names	Importance	Used for
Number	Essential	Linking entries in the subscription and donation files with the person
First name	Desirable	The first name of the member

Last name	Desirable	The surname of the member
Full name	Desirable	Useful for couples and posting newsletters etc. Enter the joint name for one person and leave the other blank, then when joint mailings are made select only those people who have an entry is this field.
Address1	Desirable	When printing address blocks on invoices and form letters the program will use this field and the two following it.
Phone	Optional	Used for form letters
Email	Desirable	Used to make selections of people with or without email addresses
Type	Important	The program uses the information in this field to allocate subscriptions to members. Each member should have an entry in this field matching one of those in the Setup/Subscriptions page.
Notes	Optional	Used for form letters

These fields can be in any order but the program needs to know where they are. Use "Setup/Fields" to enter the position of each field in the grid on the bottom right.

Removing names

Members can be deleted from the list three ways:

- Using the "Delete" button in the edit window which provides an "undo" facility while it is open.
- Right clicking on a name in the main window and choosing "Delete"
- Right clicking on a name in the main window and choosing "Archive". This action removes the name and subscription history and stores it in an archive file. Entries in the archive file can be retrieved by choosing "File/Retrieve" from the menu.

Updating the program

From time to time a new version of the program will be place on the website http://awarua.gen.nz To update your program automatically make sure you are online to the internet and choose "File/Upgrade" from the menu. If the upgrade is successful close the program and restart it. If it is not successful you will need to manually download the new version from the website to the "Subscriber" folder.

Importing data

When data is emailed three files are attached to the message, they are "Members.txt", "Subscriptions.txt" and "Donations.txt". To replace the data on your computer with the emailed version close the program and save the three files to the subfolder of "Subscriber" with the same name as the sent data.

For example if you have a member list called "Seniornet" and you have received new data for "Seniornet" via email then save the attachments to "…Subscriber\Seniornet". Note that this will replace the existing "Seniornet" data.

Limitations

There is a limit of twenty fields or pieces of information that can stored for each member.

 As all data is transferred to internal memory as the program starts there will be limit of member numbers according to the computer but there should be no problem storing up to 2000.

 As the member numbers increase there will be a decrease in performance of some functions but on modern computers this should be no problem.