

SSS Club Secretary

User Manual

Version 5.2

GETTING STARTED

**SELECT THE HELP BUTTON (?) ON THE MAIN FORM
SELECT ANY TOPIC AND PRESS "HELP"
FROM HERE YOU CAN PRINT THE USER'S MANUAL**

SETUP THE PROGRAM IN THIS ORDER

FIRST STEP - ENTER CLUB INFORMATION

**SECOND STEP - ENTER BASIC MEMBER INFORMATION
(Just the info in the top left box)**

AFTER PUTTING ALL OF THE BASIC (The info in the top left box) MEMBER INFORMATION IN , THEN YOU CAN GO BACK AND ENTER THE OTHER MEMBER INFORMATION. THE MEMBER NAME LIST FOR SOME OF THE DROP-DOWN BOXES IS PULLED FROM THE BASIC INFORMATION.

THIRD STEP - ENTER THE CLUB OFFICER INFORMATION

SETTING UP CLUB INFORMATION

- 1. Select "Club Information"**
- 2. To insert your Club Logo, select the proper size frame and then follow the directions below for that frame.**
- 3. To ADD a picture, clipart or logo follow the directions below:**
 - 1. Right click on the selected frame**
 - 2. Left click on the "Insert Object" reference in the pop up box.**
 - 3. Select the "Create From File" button**
 - 4. Left click on the "Browse" button**
 - 5. Find the picture file you want inserted (jpg, bmp, etc.)**

and then double click on the file name

To DELETE a picture:

Left click on the selected picture and then press the "Delete" key on your keyboard.

4. Entering the Fiscal Year

If your fiscal year runs from January 1 to December 31, then enter the years as such.

(example) 2005

If your fiscal year runs from another date then you should enter your years as (example)

2005 - 2006

When changing to a new year, be sure to enter the "ACTIVE YEAR" box for the new year in the Club Setup area.

5. Officers - You may enter up to 21 Club Officers.

(NOTE: DO NOT ENTER THESE UNTIL YOU HAVE ENTERED THE MEMBERS INTO THE DATA BASE!)

Enter the name of the office in the left hand column and use the drop-down boxes to enter the member into the proper office.

Deleting a Record

Click on the grey area to the left of the record and press the "Delete" key.

If you delete the minutes from a meeting, be sure to click on the "Remove All Attendees" button before deleting the meeting.

Club Information

Enter all of the Club Information preferably in the same format as the sample text already entered in the form.

The "Active Fiscal Year" drop down box will only show the years which are selected in the "Utilities" menu. You can select and deselect which years you want to display by going to the "Utilities" menu. All of the "Fiscal Year" and "Year" dates now are on the dropdown lists (from 1928 to 2030). You must select in the "Utility" menu which dates you want to display in the dropdown boxes.

INSERTING A LOGO

Format (crop) a scanned or digital picture of the picture to either a square picture or a picture twice as wide as it is high.

Try to keep the file size as small as possible. Don't just squash the size to make it small, perform a "resample to actually make the picture a smaller size.

A .jpg format works very well

To insert the picture into the database, do the following.

To ADD a logo follow the directions below:

1. Right click on the selected frame
2. Left click on the "Insert Object" reference in the pop up box.
3. Select the "Create From File" button
4. Left click on the "Browse" button
5. Find the picture file you want inserted (jpg, bmp, etc.)
and then double click on the file name

To DELETE a logo:

Left click on the selected picture and then press the "Delete" key on your keyboard.

Membership

1. Enter Member's Identification Number.

This number must be unique to each member.
Preferably use their international membership number.

-- IMPORTANT -- IMPORTANT -- IMPORTANT -- IMPORTANT --

-- IMPORTANT -- DO NOT USE THE NUMBER ONE (1) FOR A MEMBER NUMBER!

PERMANENT MEMBER NUMBERS CAN BE ANY NUMBER FROM 101 TO 99999999

IF YOU DO NOT HAVE THE MEMBERS PERMANENT NUMBER WHEN YOU ENTER THE RECORD, SELECT A TEMPORARY NUMBER BETWEEN 2 AND 99 TO USE UNTIL YOU HAVE THE PERMANENT NUMBER. WHEN YOU GET THE PERMANENT NUMBER YOU MAY GO TO BACK THE "MEMBER" MENU AND CHANGE THE MEMBER'S TEMPORARY" NUMBER TO THE "PERMANENT" NUMBER! THIS WILL CHANGE ALL CORRESPONDING RECORDS TO THE NEW NUMBER.

DO NOT REPEAT A TEMPORARY NUMBER WHICH IS IN USE, YOU MAY RE-USE THE TEMPORARY NUMBER AFTER YOU HAVE CHANGED IT TO A PERMANENT ONE!

2. Date boxes can be accessed by double clicking on the date box. This will bring up a click on calendar for fast date selection.
3. Enter the amount of the members dues and check the proper box to tell how often the member is billed for this amount.
4. OFFICES/COMMITTEES If the member holds an office in the club or is assigned to any committee, enter the information in this area. You can enter previous information in this area also.
5. MEMBER'S AWARDS If the member has received any awards which you want to keep track of, enter them into this area.
6. EQUIPMENT If a member has checked out or been assigned any club owned equipment, use this area to track said equipment.
7. SPONSORSHIP A "Sponsorship" table has been added to the member data to track who the member has sponsored into the club. This list also shows up on the individual report.
8. LABELS AND BADGES You can select different styles of mailing labels and badge inserts to print for all active members.

9. **Name or Address Change** - If the member's name or address has changed, you should make the change and then click on the appropriate box and also enter the old name or address in the note field. This will reflect on the end of month membership report and you will be given the opportunity to clear all of the checked boxes after printing the report.

In the "Membership Reports" on the member form you may now print a full list of the birthdays, spouses birthdays and wedding anniversaries for any selected month. This information will print on the newsletter, but you may also print a separate report with this information on it.

10. Enter the amount of the member's dues in the appropriate month, this amount will be billed when you select the month to bill the member.

Entering Past Presidents

Go to the "Club" menu item.

Go To "Officers"

Go to "Enter Past President For Prior Years"

Scroll down to the proper Calendar or Fiscal Years and enter the proper information.

By making these entries you will have the capability of printing the Past President List.

Meetings/Events

Required Fields:

There are certain field which are marked as "Required", be sure to make entries in these fields before closing the form. These

Name Boxes:

The "Chaired By, Asst. Chair and Secretary" boxes will use the drop down for easy member entry, but you can also enter names into these boxes who are not on the list.

Active or Completed Project:

If you change this to "Active" or "Completed" it will change all meeting or events under the present "Event Number" to whichever you select.

Attendees:

Before adding "Attendees" be sure to cise the form and then re-open the form once, this will save the data and then it is ready to enter and save the attendees.

To add the attendees to the specific meeting click on the "Add Attendee" button and a membership list will appear, then put a check mark next to the persons who attended (Including Officers) and then click on the "Close and Save" button to enter them into this meeting.

If Non-Members attended the meeting, such as a multi club meeting or a zone type meeting, you would have to enter their names in the body text of the meeting if you want to keep track of those people. You can only enter active club members in the "Attendee" box.

The Event Credits will be put into the proper collumn automatically by the "Type of Event" which you have selected - You may edit the event credits one-by-one to make adjustments for such things as extra work or chairing the project.

The default is 1 credit, but you can change this number if you like by going to the "Utilities" menu and selecting "Type Of Event" and whatever number you select for that type of event will show up in the attendee credit box.

Removing Attendees:

Select the attendee you want removed and then click on "Save and Update:."

Committees

You may enter all information along with the description of the committee and who is assigned to the committee.

Any committee member information will be forwarded to the member's personal file also, so when you look up a member history report their committee activities will be listed.

You may also send separate correspondence to the committee members with mailing labels printed to the members of a specific committee.

Newsletter

Edit or Enter Programs.

Double click on the "Set First Day" box to bring up the pop-up calendar, set the first day for which you want to print the program list for, then do the same for the "Set Last Day" box.

Click on the "Edit Programs" box and dbl click on the date box to enter the date of the program you want to edit.

Edit or Print Newsletter.

Use the drop-down to select the month and year which you want to edit or print. If you print the newsletter every other month, select the two month period in the dropdown box. Also if you print a quarterly newsletter, then select the proper quarter for editing.

Printing Newsletter:

You should fill in all three sets of boxes before printing the newsletter so the proper programs, news and birthdays and anniversaries will be included in the month(s) or quarterly newsletter.

OTHER THAN MONTHLY NEWSLETTER - If you only publish a quarterly or bi-monthly newsletter, then use the proper publish month for all articles in the "Select Month" box and use the start and end date of the programs which you want included in the newsletter.

Other Newsletter Information

On the Newsletter form there is now a selection for printing an address sheet for mailing the newsletters. You can still print envelopes for the members and non-members to mail the newsletters, but now you can also print an address sheet to wrap around the newsletter and staple and mail the newsletter to the members and non-members if you don't want to use an envelope.

Officers of the club will be automatically entered into the newsletter from the Club Information table and birthdays and anniversaries will be entered automatically from the membership list.

The Sort Box - This will select the order in which the articles will print.

IF YOU WANT TO SEE SAMPLES OF THE NEWSLETTER OUTPUT GO TO www.laportelions.org AND LOOK AT THEIR NEWSLETTERS.

INSERTING A PICTURE

Format (crop) a scanned or digital picture of the picture to either a square picture or a picture twice as wide as it is high.

Try to keep the file size as small as possible. Don't just squash the size to make it small, perform a "resample to actually make the picture a smaller size.

A .jpg format works very well if the JPG file does not work then select a BMP (Windows Bitmap) file.

To insert the picture into the database, do the following.

To ADD a picture, clipart or logo follow the directions below:

1. Right click on the selected frame
2. Left click on the "Insert Object" reference in the pop up box.
3. Select the "Create From File" button
4. Left click on the "Browse" button
5. Find the picture file you want inserted (jpg, bmp, etc.)
and then double click on the file name

To DELETE a picture:

Left click on the selected picture and then press the "Delete" key on your keyboard.

Non-Members

This is an easy way to send and keep track of anybody involved in your club business, but not a member. It could be your state or zone officers who you correspond with or you want to have their phone number available for quick and easy reference.

Enter all of the pertinent information and then press "Print Letter" and your letter will be placed on an attractive letterhead and ready to sign and mail.

Press the print envelope button and an envelope with return address and logo will be printed.

There is also a selection button to add this person to the Newsletter mailing list if you want them to receive the newsletter which is sent to members.

LETTER TO NON-MEMBER

You must have saved the person who you are writing the letter to before writing the letter. Make sure you have entered the pertinent information and then gotten out of the Non-Member file at least once.

Anytime you go to that person's file after that you can compose and print a letter and envelope to them.

Press "Print Letter" and your letter will be placed on an attractive letterhead and ready to sign and mail.

Press the print envelope button and an envelope with return address and logo will be printed.

If the letter print blank then press the "requery button and then press the print button again.

There is also a selection button to add this person to the Newsletter mailing list if you want them to receive the newsletter which is sent to members.

Dues

The left side of the form is used for adding payments and charges between billing cycles, it does not have to be on a monthly basis, it can be quarterly or annually. This basically depend on how your club's biling cycle is set up.

The right side of the form is used to move the data from the members dues area to the dues statements and it is only used when you want to charge those dues to the member.

When you want to bring the dues forward from the member file Follow steps 1 through 4 on the right side of the form in order. This will print a statement for the member with all pertinent charges relating to that member.

Normally a club would perform this function about ten or twenty days before your dues billing month (ie. If your billing for July, you would probably do this on or around the 15th of June, or if you are billing for March, you might do this about February 15th.)

When you press the "Move Dues To Temporary File" you will then select the month you want to bill for. **ONLY PERFORM THIS FUNCTION ONCE. IF YOU DO IT MORE THAN ONCE IT WILL BILL THE SELECTED AMOUNT EACH TIME YOU DO IT.**

If you happen to overbill a member you can go to edit the temporary file or edit the ledger and delete the extra entries.

After you have the printed statements return to the "Members" menu and print the envelopes for mailing.

THIS IS NOT AN ACCOUNTING PACKAGE, BUT THE DUES PART OF THE PROGRAM MAY SAVE YOU AND THE TREASURER A LOT OF TIME IN SENDING OUT DUES NOTICES.

Utilities

Takes you to a very important section with used for many different purposes such as entering your drop down information, etc., etc..

Meeting Attendance

The Type of Event drop down is very important. You should enter the amount of credit a member will receive for attending meetings and for working at different types of club projects, etc.

EXAMPLE:

Regular Meeting = 1 Point
Club Project = 3 Points
Project Chairman = 5 Point
Etc, Etc

These points will be automatically entered into the Minutes and you will be able to show how many attendance points the member has accrued for a specific period of time.

This is a function which you can use to show if your club likes to give perfect attendance awards to members.

Deleting Old News Articles

The file size will start to get very large as you put more news articles with pictures into the database.

You should use the "Deleting Old News Articles" function to delete old articles and pictures from the database and keep it a manageable size.

You should select the date which you want to delete all news articles prior to. After you select the "Delete" button it will tell you how many records you are deleting, if you want to proceed, press "Yes".

This will only delete news and pictures from the SSS Club Secretary program and will not delete pictures which are saved on your computer.

Printing Certificates

This is a very simple way to create certificates for your club presentations. The certificates are 8.5" by 11" and very attractive frames are available for this size of certificate.

EXAMPLE: Wal-Mart sells a variety of attractive frames in this size for as little as \$2.00

Enter all of the pertinent information in the spaces and then click on "Print Menu". Click on the printer icon below the picture to view the different certificate layouts. Click on the selected one to print it.

Utilities - Agenda Sheets

This will format and print agenda sheets for the club president to follow when overseeing a regular or board meeting. This is especially helpful for a person to keep track of the normal order of business during a meeting.

First print a copy of the existing agenda sheets and then edit the sheet(s) line number by line number to set it up according to your normal meeting agenda.

Print multiple copies and present them to your club president and he can pencil in the pertinent information prior to a meeting to help him follow the proper meeting format.

Backup Restore Data File

Because of the file size with the newsletter pictures in the file, it is too large to backup to 3.5" floppy diskettes.

THE DATA FILES YOU SHOULD BACKUP IS:

C:\Program Files\SSS_Club\SSS_Club_be.mdb

This is the file which you should copy either to a writable or rewritable CD or to another area of the computer or if you are on a network, to another computer.

Transferring The Program To Another Person

If you elect a new secretary and the new secretary will be using the program:

1. Give the original SSS_Club diskette to the new secretary and have him/her load the program on his/her computer.
2. Copy the data file to a CD and give the data CD to the new secretary.

THE DATA FILES IS:

C:\Program Files\SSS_Club\SSS_Club_be.mdb

3. The file SSS_Club_be.mdb should be copied to

C:\Program Files\SSS_Club\

NOTE: This will overwrite the SSS_Club_be.mdb file which is already in the directory with the new club data from the other computer.

IMPORTANT

Depending on which program file version you have (whether or not your Club Name is imbedded in the program), there could possibly be a charge of \$29.00 to unlock the program on another computer.

Insert Picture

Format (crop) a scanned or digital picture of the picture to either a square picture or a picture twice as wide as it is high.

Try to keep the file size as small as possible. Don't just squash the size to make it small, perform a "resample to actually make the picture a smaller size.

A .jpg format works very well

To insert the picture into the database, do the following.

To ADD a picture, clipart or logo follow the directions below:

1. Right click on the selected frame
2. Left click on the "Insert Object" reference in the pop up box.
3. Select the "Create From File" button
4. Left click on the "Browse" button
5. Find the picture file you want inserted (jpg, bmp, etc.)
and then double click on the file name

To DELETE a picture:

Left click on the selected picture and then press the "Delete" key on your keyboard.

Treasurer

The first thing you will want to do is set up your Acct. Funds. They will probably be "Administrative Fund" and "Project Fund.

To set up a "Starting Balance" make an entry in your Administrative Fund and/or your Project Fund, etc., etc. on a date prior to your first entry. Such as, if your fiscal year starts on July 1, you would make the "Starting Balance" entry on June 30.

Add your bank account names and numbers so the monies will be deposited and withdrawn from the proper source.

Then you will want to possibly add the names of your major club projects, You can also set the budget amounts in this area and it will print a budget report. In keeping track of your club projects this will let you know all of the income and expenses related to the specific project, This will help you plan your following years budget.

During the month use the left side of the screen to keep your accounting entries and at the end of the month post the entries to the ledger and print the appropriate report(s)

PRINTING A REPORT

PRINTING A REPORT

All reports in this program have the option of being previewed to screen, this gives you the opportunity to view the contents of the report before printing the report.

To print the report, select "File" on the top computer menu bar and then select "Print" from the drop down menu.

If you want to print just one (1) page or one (1) statement then when the file is shown on screen go to the page you want to print and select "File", "Print" and when the print menu comes up select "Current Page Only" and when you print it will only print the selected page.

UNLOCKING THE PROGRAM

The locked mode is set to 30 days of use. Be sure to allow a few days before the lock runs out to have me email you the unlock code. If you feel you will need a longer trial period please email me or call me and request an extension of the trial period.

If you receive a password from Schnable's Software Solutions you can use the Internet Unlock utility by clicking on the internet unlock and it will connect you to the internet and then ask you for your password. After entering the proper password your program will be unlocked for the computer it is installed on.

When using the internet unlock it will ask you if it is OK to connect to the internet. YOU SHOULD ANSWER "YES"

If you don not have internet access or the internet will not let you connect properly then you must perform a Manual Unlock. You can do so by performing the following actions.

Press the "Manual Unlock" button and it will show you a "Fingerprint" number.

You should copy it exactly as it shows and email me the "Fingerprint" number and I will email you back with an "Unlock" code.

One (1) Unlock Key Code will be emailed to you upon receipt of your payment for the software.

Price:

SSS CLUB SECRETARY PROGRAM WITH 1 COMPUTER UNLOCK KEY	Price	\$ 99.00
EACH ADDITIONAL COMPUTER UNLOCK KEY (For the same club)	Price	\$ 29.00

This price includes one (1) Year of support and upgrades from the date of the initial purchase of the software.

If you want to set up the program on another computer you must purchase an Unlock Key for each computer the program will be installed on.

If you change officers or if more than one person wants to use the program you will have to have an Unlock Key code for each computer.

CONTACT ME AT:

ken@schnable.com

(219) 363-3045

**Ken Schnable
Schnable's Software Solutions**

SERVICE AND SUPPORT

Contact:

**Ken Schnable
Schnable's Software Solutions
109 Second Street
La Porte, IN 46350**

Phone: (219) 363-3045

Fax: (219) 362-1048

e-mail ken@schnable.com

www.schnable.com