

Day 1 - Members

9:00 am – 12:00 pm

- Understanding Membership PLUS Terminology
 - Families
 - Individuals
 - Organizations
- Configuring the Members Module
 - Establishing Program and Data Set Properties
 - Defining Standard Fields
 - Creating User Defined Dates
 - Creating User Defined Fields
- Adding Member Records
 - Data Entry Navigation
 - Linking Individuals to Families
 - Setting Individual Family Roles
- Addresses
 - Shared Addresses
 - Alternate addresses for College Students, seasonal home addresses, deployed Military addresses, etc.
- Phone numbers and email addresses
 - Establishing Contact Types
 - Shared Contact Records
- Managing Member Records
 - Generating Member Reports
 - Backing up your Membership PLUS Data

1:30 pm – 4:00 pm

- Utilization of Member Browser
 - Customizing the Indent Value for easy viewing and searching
- Member Notes
 - Understanding the usage and functionality of Member Notes
- Configuration of Member Notes
 - Note Types
 - Note Type Categories
 - Note Type Elements
- Adding Member Notes
 - Family Notes
 - Individual Notes
- Further Your Ministry using Member Notes
 - o Tracking Spiritual Gifts
 - o Time & Talent Surveys & Skills
 - o Prospects & Visitors
 - o Additional Ministries
- Utilizing Member Notes Reports with searches and filters

Day 2 – Groups Report Generator

9:00 am – 12:00 pm

Groups

- Understanding Groups, Super Groups, and Sub Groups
 - Adding Groups
 - Adding Members to Groups
- Using Group Builder Wizard
- Tracking Attendance in Groups
 - Using Meetings to track Group Attendance
 - Group Attendance Marking Sheets
 - Overview of Group Reports
- Introduction to Small Groups
 - Adding Small Groups
 - Tracking Attendance for Small Groups
 - Overview of Small Group Reports

1:30 pm – 4:00 pm

Report Generator 101

- Introduction to Family Reports
 - Filtering for Results
 - Family Directory
 - Family Profiles
 - Printing Labels for Families
- Introduction to Member Reports
 - Member Lists
 - Member Labels
 - Birthday Reports
 - Phone Directories

Day 3 – Financials

9:00 am – 12:00 pm

- Understanding Membership PLUS Financials Module
 - Configuration and setup of Module Properties
 - o Setting up Banks
 - o Setting up Funds
 - o Linking/Interfacing with Accounting
- Contributors' Information
- Entering Contributions
 - Data Entry Methods
 - Using a Batch ID
 - Posting to Prior or Future Pledge Periods
 - Currency Types
 - Split Contributions
 - Adding Notes/Comments for Items of Value
 - Tax Deductible setting

1:30 pm – 4:00 pm

- Introduction to Deposits
- Using Deposits in Membership PLUS
 - Filter Options
 - Adding Deposits
 - Automatic posting of Contribution Deposits to Accounting
- Editing Deposited Contributions
- Pledges
 - Setup and Configuration
 - Creating Pledge Records
 - Entering and Calculating Pledges
- Printing Contribution Statements and Receipts
 - IRS Tax Statement
 - Charitable Tax Form
 - Filter Options