



# MyOrgNet Membership

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This overview describes the **MyOrgNet** membership system, its functionality, the tools provided, the data stored, the expected information flow, and the accounting. It is for general information, and is not intended as either a user manual or a programmer's reference. Detailed user information for each tool is available online by clicking the Help button on the Staff Menu line.

The sections are [Functionality](#), [Expected Flow](#), [Membership Tools](#), [Interaction with Other Functions](#) and [Data Storage](#).

## Functionality

**Renewal Notices** by email and paper

**Join and Renew** online and by mail

**Automated Accounting**

**Online Updates** by members

**Online Directory** of and for members.

**Lists** for those who need them (newsletter, emails, ballots, events)

**Ballots** and Surveys online and paper.

**Records and History.**

**Online Forum**

## Expected Flow

Renewal notices are generated using the **Lists** tool. Expiring members can be either emailed or renewal letters can be created from the list using mail-merge.

New and renewing members are entered using the **Registration** tool, or they may register themselves online using the **Sign-Up** tool.

The **Lists** tool can generate lists for memberships with either a New or a Print status for membership cards. The cards are printed using mail-merge.

Money received by the person entering the memberships is reconciled and deposited using the **Deposits** tool to move it from their cash-on-hand account to the bank account.

Directories and lists of current members can be generated as needed for emails, newsletter mailings, and event verification by the people who need them using the **Lists** tool, and they can generate their own using the **Mailing Labels** tool and the **Current Members** tool.

## Membership Tools

The membership tools are grouped by their functional area: Name and Address tools, Membership Maintenance tools, Reporting tools and Accounting tools.

The administrator will place the appropriate tools on the personal menu for the people who need them. Most users will only need a fraction of the available tools to perform their jobs.

### Name and Address Tools

Tool Name	Description
Names	Find and update name, address and contact information
My Name	Allows members, friends and staff to update their own information.

### Membership Maintenance Tools

Tool Name	Description
Group Definition	Define current membership prices.
Member Lists	Generate lists for renewal notices and reminders. Generate lists for membership cards. Generate lists for printed directories.
Registration	Find and update name, address and contact information Enter new and renewal memberships. Apply payment for separately paid memberships
Deposits	Reconcile and deposit money collected for memberships into the bank account.
Ballot Definition	Define online and/or paper ballots for elections to surveys.

### Reporting Tools

Tool Name	Description
Directory	Allow members to find contact information for other members
Current Members	Generate list of current members and expiration for events
Mailing Labels	Generate list of current members for newsletter mailing. Generate lists of current individual and family members for ballots.
News	Email online-newsletters, events of interest and news to members and friends
Statistics	Lists current memberships by type and membership gains and losses Lists historic membership gains and losses

## Administrative Tools

Tool Name	Description
Activity Definition	Define membership options with their membership-levels and accounting
Aux Data Type Definition	Allows the administrator to create additional data storage for Names and Addresses.

## Interaction With Other Functions

Function	Interactions
Donations	Donations can be automatically entered for excess membership payments.
Events	Advance tickets can be separately priced and restricted to members.
Committees	
Publicity	Emails for news and event interests can be sent to members.
Accounting	Postings are automatically entered for membership payments.
Administration	

## Data Storage

The relevant portions of the data storage are included so you can see what information is stored.

Membership information is stored four tables within the database: **Addresses**, **Names**, **Participation**, and **Activities**. Addresses and Names are independent of the Membership program, and may contain people other than members as well as enterprises and groups.

The *MyOrgNet* system is a relational database, so only one copy of any information is stored. Pointers relate the information in the various tables so Names know to which Address they belong, etc. More information on the relational structure of the *MyOrgNet* system can be found in the Structures overview, and the complete definition of all fields is in the *MyOrgNet* Defining Document.

## Addresses

The Addresses table stores the location and telephone number for a home or business. Addresses should be unique in the database, and may have any number of Names at that address.

Field	Description
AddressID	Unique record identifier
Addressee	Optional addressee override for automatic address name generation
Company	Optional company name

Street	Street address
City	City
State	State or Province
Zip	Postal code
Country	Country
HomePhone	Home or Business phone

Additional information about the household or business may be stored in a flexible auxiliary data table. The types of auxiliary information can be defined by the administrator as needed.

## Names

The Names tables stores the name and personal contact information for people, entities and groups at an address. Multiple names of varied typed may reside at the same address.

Field	Description
NameID	Unique record identifier
Address	Pointer to home address
UserName	Nickname, Group, Facility or Performance Name
Title	Title (eg. Mr. / Mrs. / Dr.)
FirstName	First Name
MI	Middle Name or Initial
LastName	Last Name
Suffix	Suffix (eg. Jr. / III / Esq.)
CellPhone	Cell or Mobile phone
WorkPhone	Work Phone
Email	Email address
Type	Individual, Family, Enterprise or Group

Additional information about the Name may be stored in a flexible auxiliary data table. The types of auxiliary information can be defined by the administrator as needed.

## Participations

The Participations table stores the membership information including the cost and any remaining balance due. Multiple memberships - usually many past and one current - can be stored for each Name.

Field	Description
ParticipationID	Unique record identifier
Program	Pointer to related program
Event	Pointer to related event

Session	Pointer to related session
Person	Pointer to related name
Activity	Pointer to related activity
DateEntered	Starting date
DateExpires	Expiration date
Status	e.g. New / Print / Printed
Amount	Cost
Balance	Remaining balance due.
Notes	Optional notes

Participations for all family members at the same Address are automatically added when a family membership is added.

## Activities

The Activities table stores the defining information for each type of membership offered, and includes the accounts where the income should be posted.

Field	Description
ActivityID	Unique record identifier
ActivityName	Name of the membership (e.g. Family 3-yr)
MembershipLevel	Newsletter / Affiliated / Organization / Individual / Family
CreditAccount	Account to be credited (Usually Membership Income)
DebitAccount	Account to be debited (Usually ProgramCash)

## Accounting

A membership registration creates a receivable from the member.

When a payment is applied to a membership registration, it is debited to the Cash account for the user and credits Membership Income for the member.

When the deposit is made, it credits the Cash account for the user and debits the Bank account.

Current balances are maintained for the receivable (in the Participation record) and for the payment (in a Transactions record).

Accounting summaries and details are available by membership type (e.g. Family 3-yr).

A current membership liability (for the unused portions of memberships) is calculated whenever needed.



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