

Sample Association/Member Management System

Softek developed a custom Association Management System for the Agricultural Retailer's Association to manage organizational members; multiple contacts within each organization; multiple locations within each organization; primary, voting, and prospect contacts; renewals and dues invoicing; conferences and meeting registrations; custom queries and exports; and broadcast emailing, and faxing. These sample GUI interfaces will provide examples of what Softek can develop and incorporate into any custom system. The front-end was built using Microsoft Access and the back-end data is stored in Microsoft SQL Server.

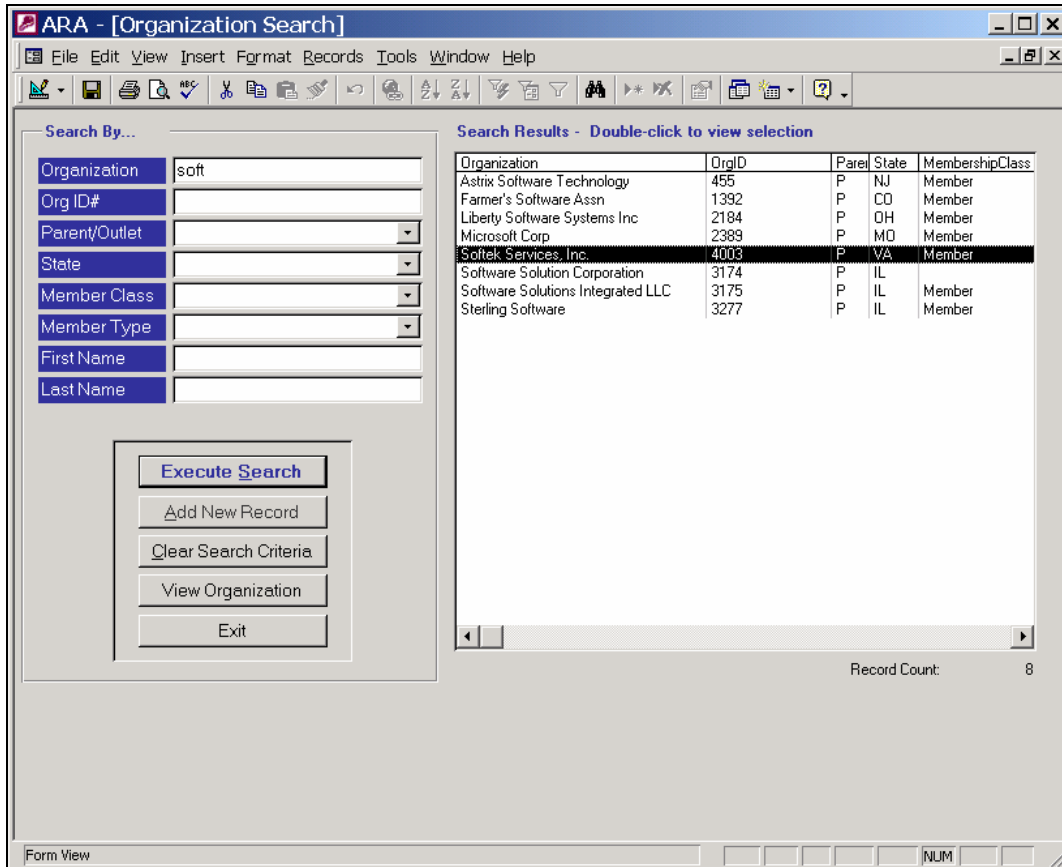
Main Menu

In designing a custom system, Softek will use your organization's colors and logo.



Search Screen

A custom search screen appears after selecting most main menu choices. The search screen allows users to quickly find a specific record or group of records in order to view or update the information. Softek works with each organization to determine which fields should be included on the various search screens.



The screenshot shows a software window titled "ARA - [Organization Search]". The window has a menu bar (File, Edit, View, Insert, Format, Records, Tools, Window, Help) and a toolbar with various icons. The main area is divided into two sections:

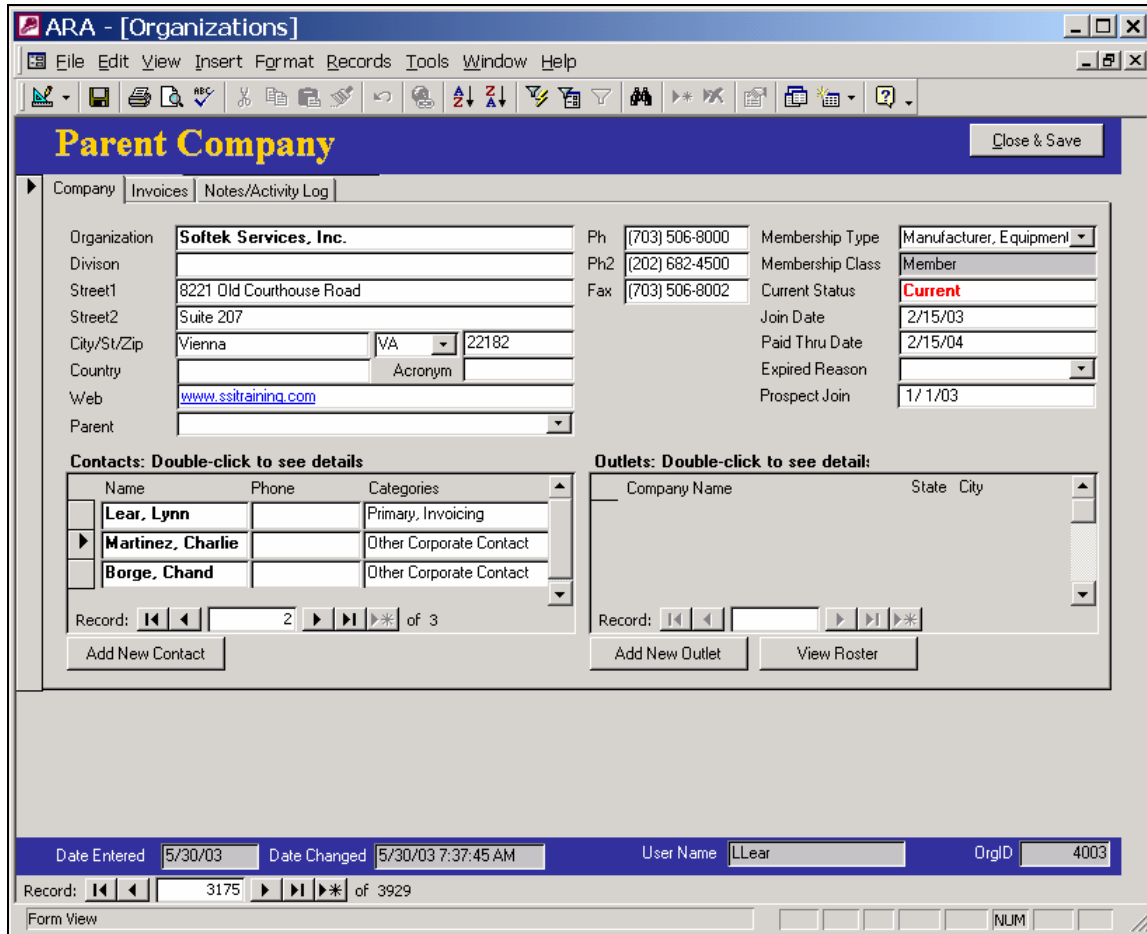
- Search By...:** A form with input fields for "Organization" (containing "soft"), "Org ID#", "Parent/Outlet", "State", "Member Class", "Member Type", "First Name", and "Last Name". Below these fields are buttons for "Execute Search", "Add New Record", "Clear Search Criteria", "View Organization", and "Exit".
- Search Results - Double-click to view selection:** A table displaying search results. The table has columns for Organization, OrgID, Parent, State, and MembershipClass. The results are as follows:

Organization	OrgID	Parent	State	MembershipClass
Astrix Software Technology	455	P	NJ	Member
Farmer's Software Assn	1392	P	CO	Member
Liberty Software Systems Inc	2184	P	OH	Member
Microsoft Corp	2389	P	MO	Member
Softek Services, Inc.	4003	P	VA	Member
Software Solution Corporation	3174	P	IL	
Software Solutions Integrated LLC	3175	P	IL	Member
Sterling Software	3277	P	IL	Member

At the bottom right of the window, it says "Record Count: 8". The status bar at the very bottom shows "Form View" and a "NUM" indicator.

Sample Organization Screen

Softek has extensive experience in creating intuitive, flexible, and highly productive graphical user interfaces for custom applications. With ARA's system, users could affiliate an unlimited number of contacts to the same organization. In addition, users could affiliate multiple subsidiary companies, which ARA referred to as outlets. Membership fields such as Membership Type, Current Status, Join Date, Paid Through Date, etc. can be stored at the Organization level or the Contact level.



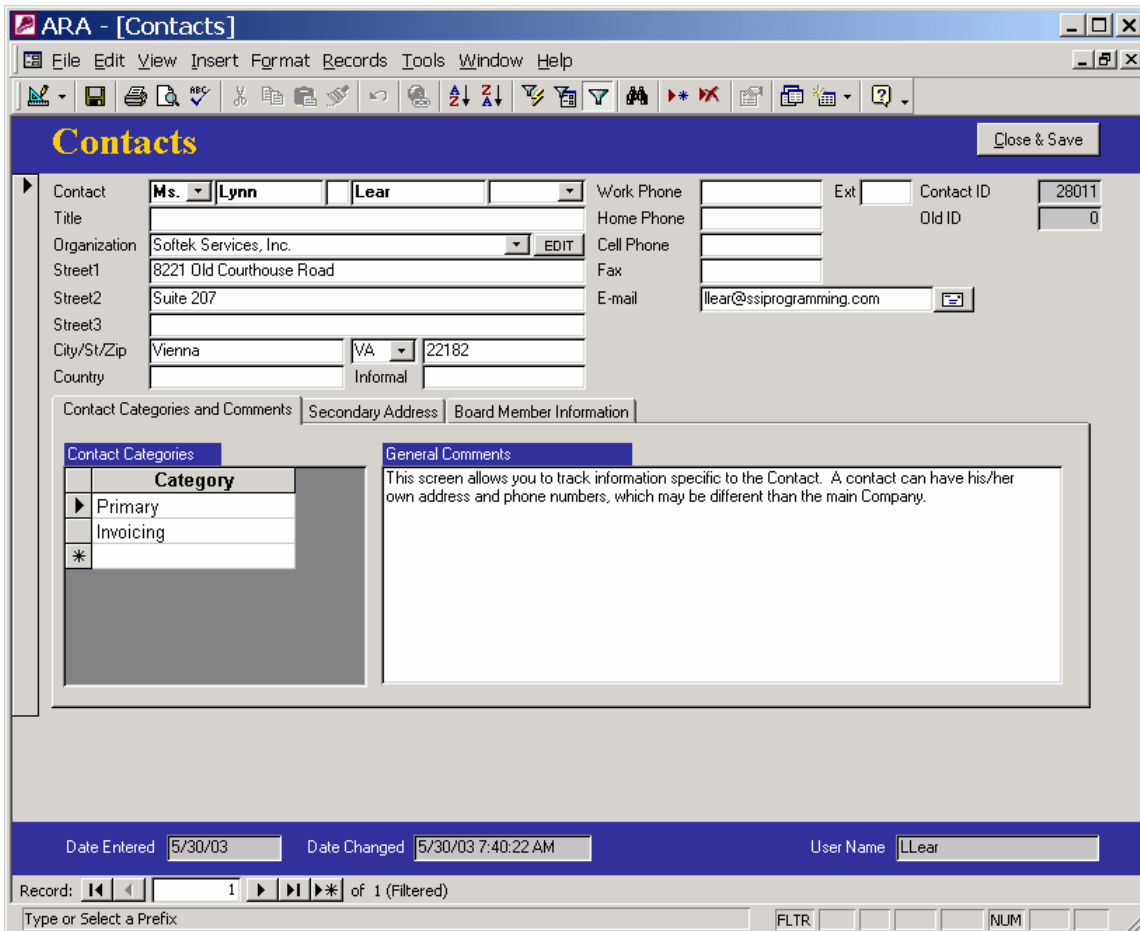
The screenshot displays the 'ARA - [Organizations]' application window. The main title is 'Parent Company'. The interface includes a menu bar (File, Edit, View, Insert, Format, Records, Tools, Window, Help) and a toolbar with various icons. The main content area is divided into several sections:

- Company Information:** Fields for Organization (Softek Services, Inc.), Division, Street1 (8221 Old Courthouse Road), Street2 (Suite 207), City/St/Zip (Vienna, VA, 22182), Country, Web (www.ssittraining.com), and Parent.
- Membership Information:** Fields for Ph (703) 506-8000, Ph2 (202) 682-4500, Fax (703) 506-8002, Membership Type (Manufacturer, Equipment), Membership Class (Member), Current Status (Current), Join Date (2/15/03), Paid Thru Date (2/15/04), Expired Reason, and Prospect Join (1/1/03).
- Contacts:** A table with columns for Name, Phone, and Categories. It lists three contacts: Lynn Lear (Primary, Invoicing), Charlie Martinez (Other Corporate Contact), and Chand Borge (Other Corporate Contact). Navigation controls show 'Record: 2 of 3' and an 'Add New Contact' button.
- Outlets:** A section for adding subsidiary companies with columns for Company Name, State, and City. It includes navigation controls showing 'Record: of 3' and buttons for 'Add New Outlet' and 'View Roster'.

At the bottom of the window, there is a status bar with fields for Date Entered (5/30/03), Date Changed (5/30/03 7:37:45 AM), User Name (LLear), and OrgID (4003). A record navigation bar shows 'Record: 3175 of 3929' and a 'Form View' button.

Sample Contacts Screen

Contacts can have their own set of attributes. By default, the organization's address, city, state and zip are automatically transferred when a new contact record is created. However, a contact's address can be modified independent of his/her organization's address. Each contact can also have multiple categories or codes to help query and extract certain groups of users. An E-mail button is also available to automatically start an e-mail message to the contact.



The screenshot shows a software window titled "ARA - [Contacts]". The interface includes a menu bar (File, Edit, View, Insert, Format, Records, Tools, Window, Help) and a toolbar with various icons. The main content area is titled "Contacts" and features a "Close & Save" button in the top right corner.

The contact record is displayed in a form with the following fields:

- Contact:** Ms. Lynn Lear
- Title:** (empty)
- Organization:** Softek Services, Inc. (with an EDIT button)
- Street1:** 8221 Old Courthouse Road
- Street2:** Suite 207
- Street3:** (empty)
- City/St/Zip:** Vienna VA 22182
- Country:** Informal
- Work Phone:** (empty)
- Home Phone:** (empty)
- Cell Phone:** (empty)
- Fax:** (empty)
- E-mail:** llear@ssiprogramming.com (with an email icon)
- Contact ID:** 28011
- Old ID:** 0

Below the main form, there are three tabs: "Contact Categories and Comments", "Secondary Address", and "Board Member Information". The "Contact Categories and Comments" tab is active, showing two sub-sections:

- Contact Categories:** A table with a "Category" header and the following entries:

Category
▶ Primary
Invoicing
*
- General Comments:** A text area containing the text: "This screen allows you to track information specific to the Contact. A contact can have his/her own address and phone numbers, which may be different than the main Company."

At the bottom of the window, there is a status bar with the following information:

- Date Entered:** 5/30/03
- Date Changed:** 5/30/03 7:40:22 AM
- User Name:** LLear
- Record:** 1 of 1 (Filtered)
- Buttons:** Type or Select a Prefix, FLTR, NUM

Sample Board Member/Committee Information Screen

The database can also track the various committees and roles that each contact serves.

Contacts
Close & Save

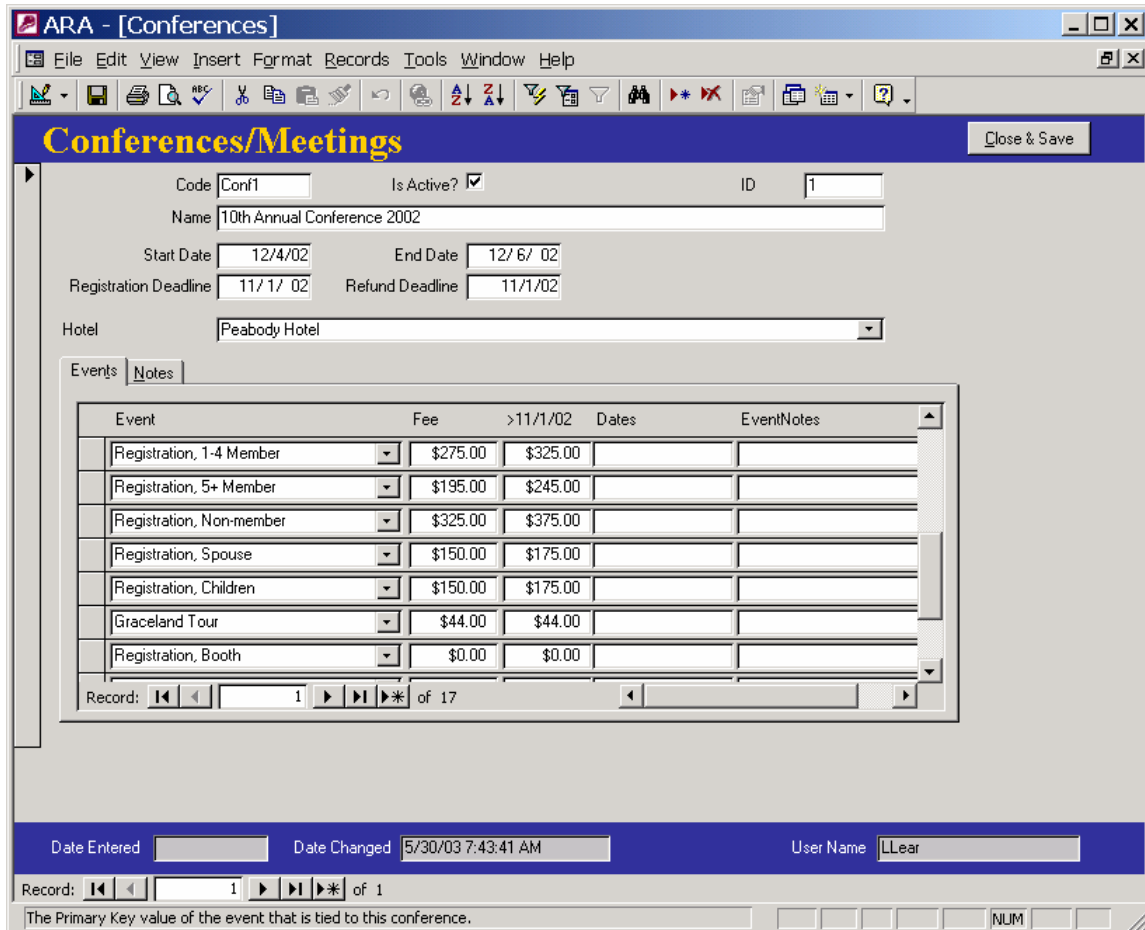
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="border: 1px solid gray; padding: 2px;">Contact</td> <td style="border: 1px solid gray; padding: 2px;">Ms. Lynn Lear</td> <td style="border: 1px solid gray; padding: 2px;">Work Phone</td> <td style="border: 1px solid gray; padding: 2px;"></td> <td style="border: 1px solid gray; padding: 2px;">Ext</td> <td style="border: 1px solid gray; padding: 2px;"></td> <td style="border: 1px solid gray; padding: 2px;">Contact ID</td> <td style="border: 1px solid gray; padding: 2px;">28011</td> </tr> <tr> <td style="border: 1px solid gray; padding: 2px;">Title</td> <td style="border: 1px solid gray; padding: 2px;"></td> <td style="border: 1px solid gray; padding: 2px;">Home Phone</td> <td style="border: 1px solid gray; padding: 2px;"></td> <td style="border: 1px solid gray; padding: 2px;"></td> <td style="border: 1px solid gray; padding: 2px;"></td> <td style="border: 1px solid gray; padding: 2px;">Old ID</td> <td style="border: 1px solid gray; padding: 2px;">0</td> </tr> <tr> <td style="border: 1px solid gray; padding: 2px;">Organization</td> <td style="border: 1px solid gray; padding: 2px;">Softek Services, Inc. EDIT</td> <td style="border: 1px solid gray; padding: 2px;">Cell Phone</td> <td style="border: 1px solid gray; padding: 2px;"></td> <td style="border: 1px solid gray; padding: 2px;"></td> <td style="border: 1px solid gray; padding: 2px;"></td> <td colspan="2"></td> </tr> <tr> <td style="border: 1px solid gray; padding: 2px;">Street1</td> <td style="border: 1px solid gray; padding: 2px;">8221 Old Courthouse Road</td> <td style="border: 1px solid gray; padding: 2px;">Fax</td> <td style="border: 1px solid gray; padding: 2px;"></td> <td colspan="4"></td> </tr> <tr> <td style="border: 1px solid gray; padding: 2px;">Street2</td> <td style="border: 1px solid gray; padding: 2px;">Suite 207</td> <td style="border: 1px solid gray; padding: 2px;">E-mail</td> <td colspan="5" style="border: 1px solid gray; padding: 2px;">llear@ssiprogramming.com ✉</td> </tr> <tr> <td style="border: 1px solid gray; padding: 2px;">Street3</td> <td style="border: 1px solid gray; padding: 2px;"></td> <td colspan="6"></td> </tr> <tr> <td style="border: 1px solid gray; padding: 2px;">City/St/Zip</td> <td style="border: 1px solid gray; padding: 2px;">Vienna VA 22182</td> <td colspan="6"></td> </tr> <tr> <td style="border: 1px solid gray; padding: 2px;">Country</td> <td style="border: 1px solid gray; padding: 2px;">Informal</td> <td colspan="6"></td> </tr> </table>	Contact	Ms. Lynn Lear	Work Phone		Ext		Contact ID	28011	Title		Home Phone				Old ID	0	Organization	Softek Services, Inc. EDIT	Cell Phone						Street1	8221 Old Courthouse Road	Fax						Street2	Suite 207	E-mail	llear@ssiprogramming.com ✉					Street3								City/St/Zip	Vienna VA 22182							Country	Informal							<div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;"> Contact Categories and Comments Secondary Address Board Member Information </div> <table style="width: 100%; border-collapse: collapse; font-size: 0.9em;"> <thead> <tr style="background-color: #4a7ebb; color: white;"> <th style="width: 10%;"></th> <th style="width: 15%;">Begin Date</th> <th style="width: 15%;">End Date</th> <th style="width: 20%;">Board Role</th> <th style="width: 20%;">Committee</th> <th style="width: 20%;">Committee Role</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">▶</td> <td style="text-align: center;">2/15/03</td> <td style="text-align: center;">2/15/04</td> <td style="text-align: center;">Chairman</td> <td style="text-align: center;">Legislative (Public Policy)</td> <td style="text-align: center;">Committee Chairman</td> </tr> <tr> <td style="text-align: center;">▶</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <div style="margin-top: 10px; font-size: 0.8em;"> Record: 2 of 2 </div>		Begin Date	End Date	Board Role	Committee	Committee Role	▶	2/15/03	2/15/04	Chairman	Legislative (Public Policy)	Committee Chairman	▶					
Contact	Ms. Lynn Lear	Work Phone		Ext		Contact ID	28011																																																																												
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Date Entered	5/30/03	Date Changed	5/30/03 7:40:22 AM	User Name	LLear
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Record: 7294 of 11662

Sample Meeting/Conference Set Up Screen

The Conferences and Meetings screen will be used to set up new meetings or conferences. This screen holds information such as meeting/conference name, start date, end date, deadline date, etc. In addition, the screen allows users to identify the individual events for the meeting/conference and associate costs with each event, if any.



ARA - [Conferences]

File Edit View Insert Format Records Tools Window Help

Conferences/Meetings Close & Save

Code: Conf1 Is Active? ID: 1

Name: 10th Annual Conference 2002

Start Date: 12/4/02 End Date: 12/6/02

Registration Deadline: 11/17/02 Refund Deadline: 11/17/02

Hotel: Peabody Hotel

Events | Notes

Event	Fee	>11/1/02	Dates	EventNotes
Registration, 1-4 Member	\$275.00	\$325.00		
Registration, 5+ Member	\$195.00	\$245.00		
Registration, Non-member	\$325.00	\$375.00		
Registration, Spouse	\$150.00	\$175.00		
Registration, Children	\$150.00	\$175.00		
Graceland Tour	\$44.00	\$44.00		
Registration, Booth	\$0.00	\$0.00		

Record: 1 of 17

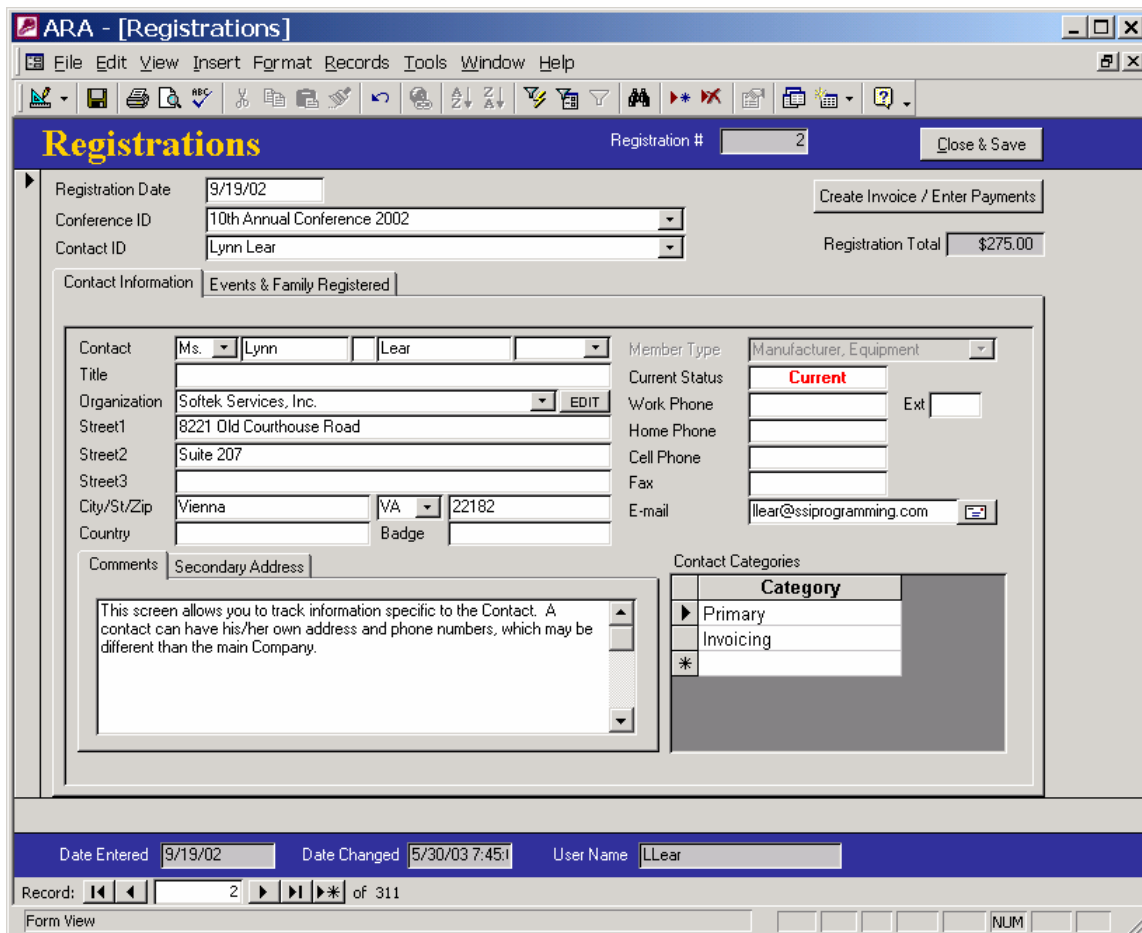
Date Entered: Date Changed: 5/30/03 7:43:41 AM User Name: LLear

Record: 1 of 1

The Primary Key value of the event that is tied to this conference. NUM

Sample Registration Screen

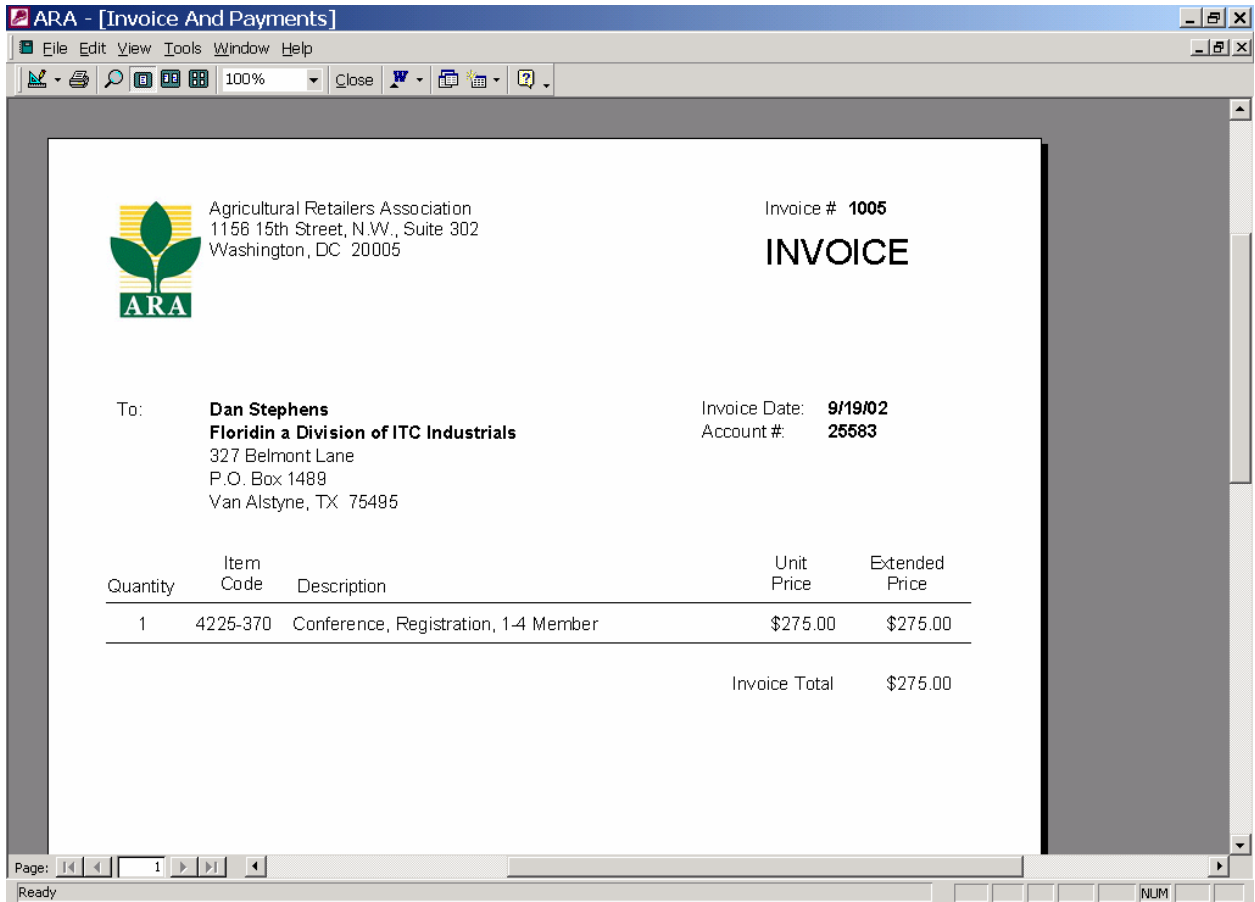
The Registration screen is used to register contacts to a meeting or conference. If an existing contact is selected from the drop-down, his/her information is automatically linked to the registration screen. Users can update this information and it will automatically change the original contact record. From the Registration screen, new contacts can also be added on-the-fly should the person not exist in the database.



The screenshot shows a software window titled "ARA - [Registrations]". The interface includes a menu bar (File, Edit, View, Insert, Format, Records, Tools, Window, Help) and a toolbar with various icons. The main content area is titled "Registrations" and features a "Registration # 2" field and a "Close & Save" button. Below this, there are fields for "Registration Date" (9/19/02), "Conference ID" (10th Annual Conference 2002), and "Contact ID" (Lynn Lear). A "Create Invoice / Enter Payments" button is also present. The "Registration Total" is displayed as \$275.00. A "Contact Information" tab is active, showing fields for "Contact" (Ms. Lynn Lear), "Member Type" (Manufacturer, Equipment), "Current Status" (Current), "Work Phone", "Home Phone", "Cell Phone", "Fax", and "E-mail" (llear@ssiprogramming.com). A "Comments" section contains a text area with a message: "This screen allows you to track information specific to the Contact. A contact can have his/her own address and phone numbers, which may be different than the main Company." A "Contact Categories" table is visible, listing "Primary" and "Invoicing" categories. At the bottom, there are fields for "Date Entered" (9/19/02), "Date Changed" (5/30/03 7:45:1), and "User Name" (LLear). The status bar shows "Record: 2 of 311" and "Form View".

Sample Invoice Report

This is a sample invoice report that can be produced from the database system. MS Access has the ability to incorporate logos, special fonts, and color on any report.



The screenshot shows a Microsoft Access report window titled "ARA - [Invoice And Payments]". The report content is as follows:

ARA
 Agricultural Retailers Association
 1156 15th Street, N.W., Suite 302
 Washington, DC 20005

Invoice # **1005**
INVOICE

To: **Dan Stephens**
Floridin a Division of ITC Industrials
 327 Belmont Lane
 P.O. Box 1489
 Van Alstyne, TX 75495

Invoice Date: **9/19/02**
 Account #: **25583**

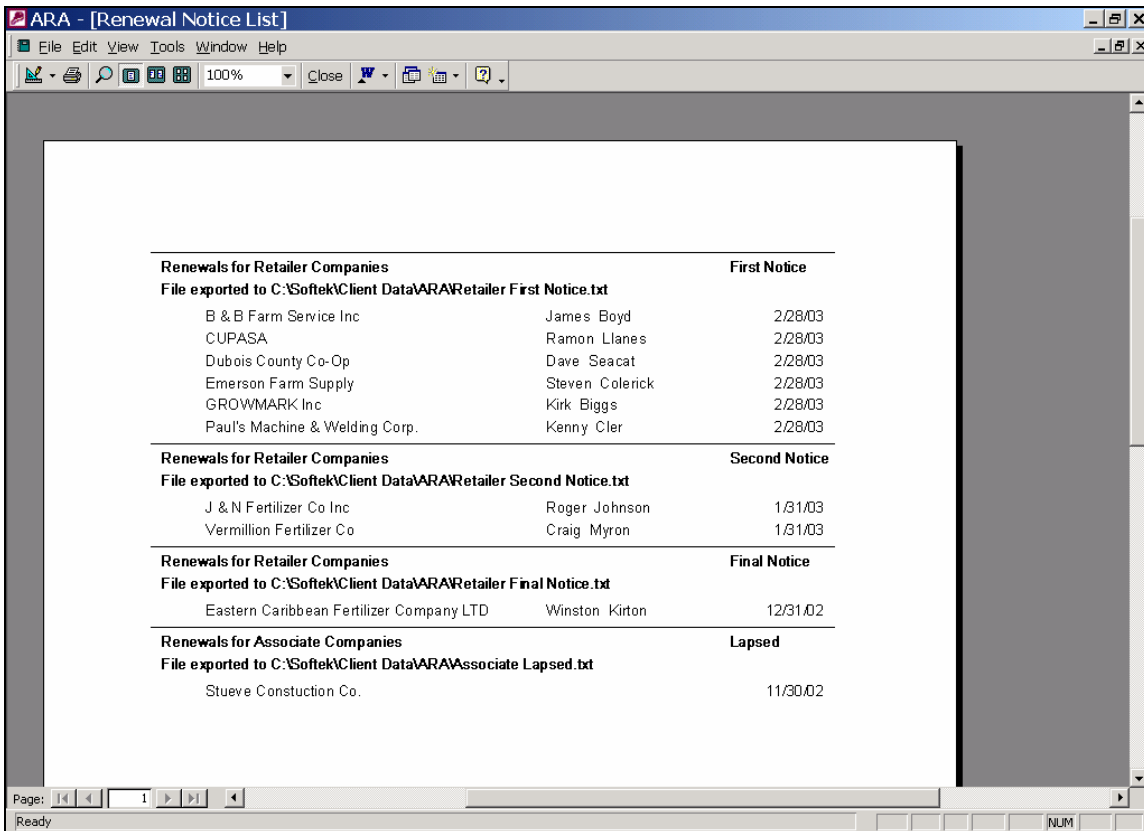
Quantity	Item Code	Description	Unit Price	Extended Price
1	4225-370	Conference, Registration, 1-4 Member	\$275.00	\$275.00

Invoice Total \$275.00

Page: 1 of 1
 Ready

Sample Dues/Renewal Invoices

Softek designed a process for ARA to invoice members on a monthly basis. The monthly invoices are actually 3-page MS Word merge documents that start with a letter from ARA's President. For this system, a prompt appears requesting the month 1st renewals need to be generated. After selecting a month/year, the system automatically queries the database for all members due for renewal, generates a list of expiring members, then exports the information for merging in MS Word. In addition, the system generates 2nd, 3rd, and final notices, if applicable, for those members that have received prior notices but have not renewed.



Sample Query / E-mail / Export Screen

This Query/Export screen provides a user-friendly interface for creating queries to extract certain groups or lists of people. The first tab of the Query / Export screen allows users to identify the criteria for the query.



Advanced Search

Query / Export

Close

Set Search Criterion | View Search Results | Export Selected Fields

Step 1: Select Field, Comparison, and Write Selection Criteria

Field Comparison Criteria

All of the Criteria [Step 2: Add Criteria to Area Below](#)

Any of the Criteria

Show records that meet the following criteria:

- [Membership Class] Is Equal To Member
- [State] Is Equal To Virginia

Step 3: Display Records Clear All Criteria

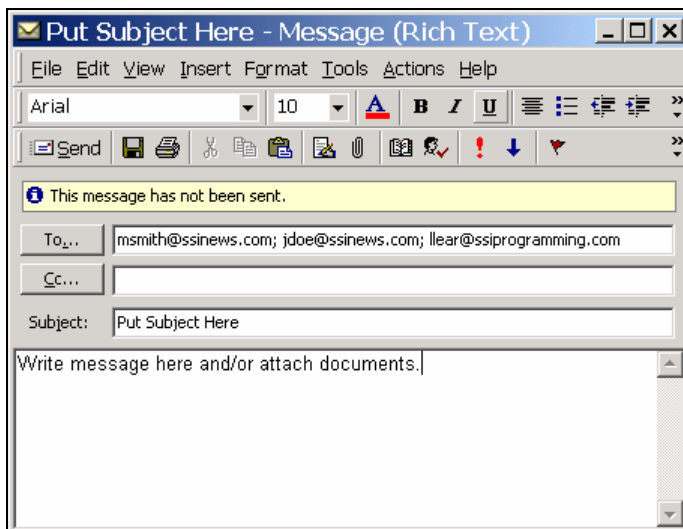
Sample Query Results Screen

The second tab of the Query / Export screen displays the query results. From this screen, click the **Send E-mail to Search Results** button to automatically launch an e-mail message window with the addresses populated in the Blind Carbon Copy field.



Prefix	FirstName	MI	LastName	Suffix	Title	Organization	Street1
	Greg		Adlich			Southern State Cooperative Inc	P O Box
	Michael	R	Allen		Dem Sales	Franklin Equipment Co	P O Box
	James		Alther		Plant Manager	Culpeper Farmer's Co-Op Inc	P O Box
	Perry		Auhman		Vice President	American MicroTrace Corp	569 Cent
	Max		Baer		Senior Vice President	Royster-Clark Inc	409 Mair
	Vince		Bailey			Southern States Corp Inc	6606 W I
	Michael	L	Barry		Vice President, Technology &	American MicroTrace Corp	569 Cent
	John		Bates		Field Sales	Culpeper Farmer's Co-Op Inc	P O Box
	Walter		Bayne		Fertilizer & Chemical Plant Ma	Orange-Madison Coop	P O Box
	Buster		Beier			Culpeper Farmer's Co-Op Inc	P O Box
	Steven	A.	Betts		Product Mgr Ammonium Sulfu	Honeywell	700 S 6th
	Jason		Black			Rockbridge Farmers Corp Inc	645 Wac
	John	R.	Block		President	Food Distributors International	201 Park
Mr.	Chand		Borge			Softek Services, Inc.	8221 Old
	James	W	Bratt		President	T-Tech Corp	P O Box
	Frances		Bratt			T-Tech Corp	P O Box
	Thomas	M	Burton			Burton & Puckett	Rt 1 Box
	Craig		Butler		Applicator	Tri-County Farm Services	P O Box
	C Reid		Carr		Vice President	James River Farm Service	P O Box

Sample E-mail to Search Results



Put Subject Here - Message (Rich Text)

File Edit View Insert Format Tools Actions Help

Arial 10

Send

This message has not been sent.

To... msmith@ssinews.com; jdoe@ssinews.com; llear@ssiiprogramming.com

Cc...

Subject: Put Subject Here

Write message here and/or attach documents.

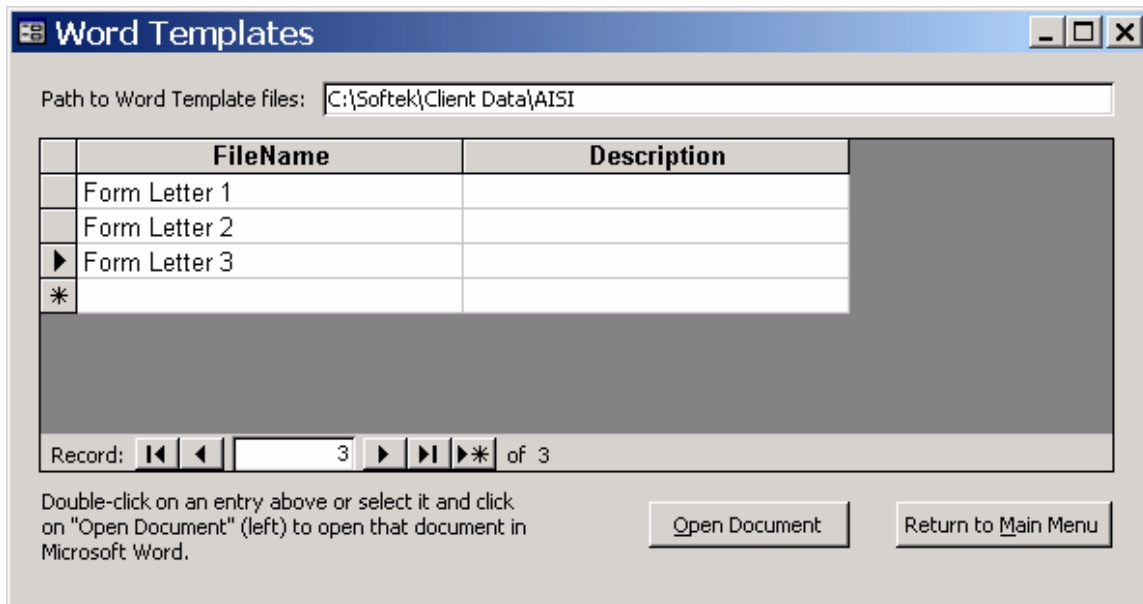
Sample Export Screen

The third tab of the Query / Export screen allows users to export fields from the search results to an Excel spreadsheet or a delimited Text file.



Sample Word Mail Merge Screen

The system can also allow users to automatically launch MS Word and merge results to a pre-defined list of templates.



Word Templates

Path to Word Template files: C:\Softek\Client Data\AISI

	FileName	Description
	Form Letter 1	
	Form Letter 2	
▶	Form Letter 3	
*		

Record: 3 of 3

Double-click on an entry above or select it and click on "Open Document" (left) to open that document in Microsoft Word.

Open Document Return to Main Menu