VSS Book-keeper / Membership Installation Instructions

1.) Installing Veterans Software Services products

To install this VSS product, ~~insert the CD into your CD-Rom drive.~~ The installation should begin automatically. Follow the on-screen prompts.

If installation does not begin automatically, click Start, Run. Type d:\setup32.exe (or the appropriate drive letter of your CD-Rom drive, followed by \setup32.exe). Then follow on-screen prompts.

2.) Getting Started

Once you've installed VSS Software, a new Veterans Software Services group will appear in Windows Start, Programs menu. This group contains an icon to launch Bookkeeper and one to launch Membership. Additionally, Icons for launching each application will be placed on the Windows desktop.

3.) Starting Books

Double-click the VSS Post Books Desktop icon, or alternatively;

In the appropriate Veterans Software Services group, click Bookkeeper. The Bookkeeper Setup window will open. Follow the on-screen instructions as you continue through each setup step.

Once setup is completed, you are ready to enter, track, and report all of the financial information for your organization.

A complete help system is contained within the Bookkeeper application to assist with your questions.

If you are upgrading from an earlier version you can use System Utilities, Restore, to restore your existing data.

4.) Starting Membership

In the appropriate Veterans Software Services group, click Membership.

The selected Membership application will start. If you are upgrading from an earlier version, and want to restore your current data, add 1 fictitious member to your current roster. Choose System Utilities, Roster Utilities, Restore.

If you want to start fresh with a new downloaded roster, use System Utilities, Roster Utilities, Import Roster. Select the appropriate options based on your downloaded file.

Open the roster from the Console window. You are now ready to see the tremendous functionality and versatility of the Membership application. The Membership application has a complete help system installed to assist you with any functions you wish to perform.

5.) Technical Assistance

Technical Assistance is available by phone ~~573.204.7824~~ Mon-Fri 8:30 am. - 4:30 pm. CST.
Technical Assistance by e-mail: ~~support@vss-software.com~~
Technical Support web site: ~~http://www.vss-software.com~~

Services: Un-limited free technical support via phone; ~~573.204.7824~~
Free setup support
Free access to VSS Member forums
Free support for Bookkeeper corrections (includes technical staff assisting you in correcting errors and transferring corrected files to you via e-mail). (Bookkeeper)
Free roster update downloads from VSS web-site (participating Departments only). (Membership)
Free software updates
Free monthly newsletter via e-mail

VSS QM Books Pro

Basic Training Manual

presented by

Veterans Software Services

Table of Contents

Introduction

Introduction

QM Books is designed around the basic accounting outline of the VFW organization. This type of accounting is known as fund accounting. It ensures that required financial reports are generated in the format set forth by your organization and can be quickly generated.

Understanding Fund Accounting

Stated simply, all money received and/or disbursed is designated for a specific purpose. i.e., sales made in the canteen are designated to the Post Canteen fund. Admission fees are designated to the Admission/Application fund and so forth.

Generally speaking, all monies received and/or disbursed, which are not specifically earmarked otherwise, would be credited or debited to the Post General fund. (A general operating fund for day-to-day operations).

All monies received by the organization can be deposited to one general bank account or held in several separate bank accounts. However, all monies owned by the organization must be designated a specific Fund regardless of the physical bank account they are held in.

It is not necessary to maintain numerous bank accounts in order to separate your monies into each separate fund. This separation can be done easily on paper to show the amounts maintained in each separate fund, while all monies are held in a single account.

Transactions made can then be credited or debited to the appropriate fund when monies are moved to or from your bank account.

A simple illustration would look like this.....

Bank Account

General Fund Checking	Balance	$10,000.00

Fund Accounts	Balance
NATIONAL & DEPT DUES	500.00
ADMISSION & APPLICATION FEES	.00
POST GENERAL FUND	$ 3,000.00
POST RELIEF FUND	$ 2,000.00
POST DUES RESERVE FUND	
POST HOME OR BUILDING FUND	$ 3,000.00
POST CANTEEN OR CLUB FUND	$ 1,500.00
Total of Funds	$10,000.00

The total of all funds must equal the total of the bank balance.

This illustration holds true even when additional Fund Accounts are maintained but held in a separate bank account.

For example if we add a new Bingo Bank Account (separate) and a Bingo Fund Account the Fund Accounting report would look similar to the following;

Bank Account

Bingo Checking	Balance	$10,000.00
Fund Accounts	Balance	
Bingo Fund		<u>$10,000.00</u>
Total of Funds		$20,000.00
Total of All Bank Accounts	$20,000.00	

These figures would then translate to a monthly and quarterly report indicating the changes of each fund during the reporting period.

Fund accounting is that simple. The key is to determine the source and purpose of the income or disbursement, thus determining the correct fund to either debit or credit when entering transactions.

However, understanding these basic rules is paramount to maintaining accurate and proper accounting records for your organization. Once you have these fundamentals, generating complete and accurate reports is a simple process you will accomplish with great ease and satisfaction.

CHAPTER 1.)

Account Setup

The first step in creating a Fund Account (Audit Account) is to first establish a Bank Account for receiving and disbursing monies.

QM Books ships with 3 pre-defined bank accounts.

General Fund Checking, Canteen Checking and General Fund Savings.

These can be renamed, deleted, or simply left for later use.

By System Default, all transactions posted to the Post Canteen or Club Fund (Audit Account) are credited to the Canteen Checking bank account. All other monies received into any other Fund are credited to the General Fund Checking Account.

The bank account designated for any fund can be changed using the Account Maintenance function of the Main Books window. (more on this later).

Adding New Bank Accounts

Bank Accounts can be added by simply highlighting a current bank account (listed).

Figure 1.
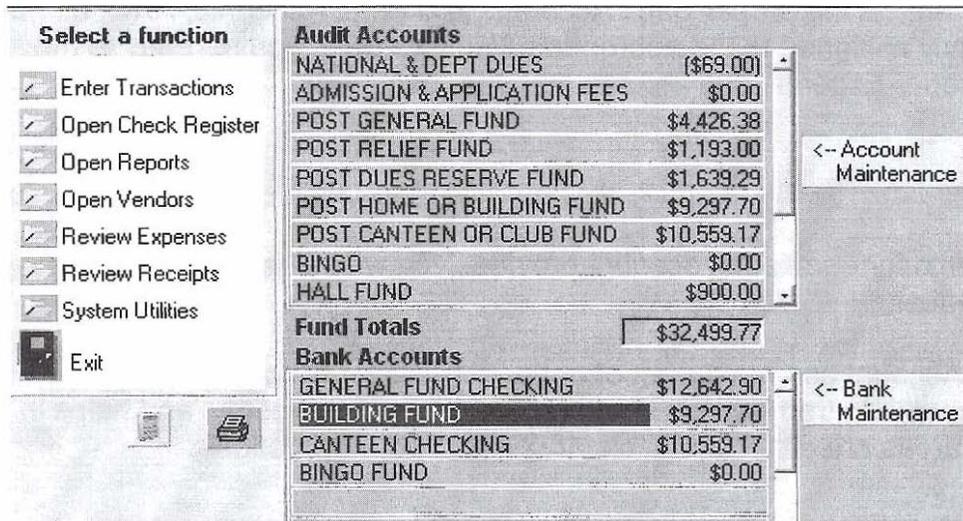
Select a function	Audit Accounts	
Enter Transactions	NATIONAL & DEPT DUES	($69.00)
Open Check Register	ADMISSION & APPLICATION FEES	$0.00
Open Reports	POST GENERAL FUND	$4,426.38
Open Vendors	POST RELIEF FUND	$1,193.00
Review Expenses	POST DUES RESERVE FUND	$1,639.29
Review Receipts	POST HOME OR BUILDING FUND	$9,297.70
System Utilities	POST CANTEEN OR CLUB FUND	$10,559.17
Exit	BINGO	$0.00
	HALL FUND	$900.00
	Fund Totals	$32,499.77

<-- Account Maintenance

Bank Accounts	
GENERAL FUND CHECKING	$12,642.90
BUILDING FUND	$9,297.70
CANTEEN CHECKING	$10,559.17
BINGO FUND	$0.00

<-- Bank Maintenance

Click Bank Maintenance and choose 'New Bank Account'. Type the Name for the account when prompted. The new bank account will appear in your list of bank accounts.

Adding New Fund Accounts
To do this, highlight any fund in your list of Audit Accounts, click 'Account Maintenance'. (See Figure 1.)

Choose 'New Audit Account'. Select the appropriate Bank Account from the list. Enter the desired name for the New Audit Account and click 'Ok'. Once the new fund (audit account) appears in your list of Audit Accounts, select it (highlight). Choose 'Account Maintenance', 'Adjust Current Balance'. Enter the current balance of this new account. Click 'Yes'. If the Bank Account balance needs to also be adjusted, click 'Yes' at the Adjust Bank Balance prompt.

** Before continuing, double-check that the total of all Fund (audit) Accounts equals the total of all Bank Accounts.

If the totals do not match, check the Fund Totals for each bank account and adjust incorrect amounts accordingly.
Fund Account balances are adjusted using 'Account Maintenance' functions.
Bank Account balance are adjusted using 'Bank Maintenance' functions.

NOTE: Bank Accounts and Fund (audit) Accounts cannot be deleted once transactions have been posted to them.

Once your system reflects the proper Bank Accounts and Fund Accounts, AND, all Fund Accounts are properly assigned to the appropriate bank account, you're ready to move on to identifying the proper Expense and Income Items for each Fund.

Income Items

Defining income items for each audit account provides you with extensive capabilities for managing your finances.

Each Fund (Audit) Account can have a list of up to 75 items for which you receive income. This allows you to maintain tremendous detail regarding your operations and helps in determining which areas are either profitable or costly to your operations.

VSS ships with a pre-defined list of income items for each Audit Account listed.

Your list can be as detailed or as broad as you wish depending on your particular needs. However, you should keep in mind that each deposit posted to a Fund must also include a specific income (source) item.

An example might be...
If a $75.00 deposit is made to the National & Department Dues fund, the most likely income item would be some form of Dues income.

However, deposits made to Post General Fund or Post Canteen Fund could include a much broader range of items. Such as, clothing, food, soft drinks, etc. However, you may want to be even more specific and break these into smaller groups instead. An example would be (clothing), hats, caps, shirts, jackets, etc. Soft drinks might be further defined as Pepsi, Coke, RC, etc. Providing this amount of detail will allow you to later retrieve more specific information about your operations. i.e., profit/loss from cap sales.

When defining your list of income items for each Fund account, keep in mind these items will be available later for defining the reasons (source) of that income.

Figure 2.
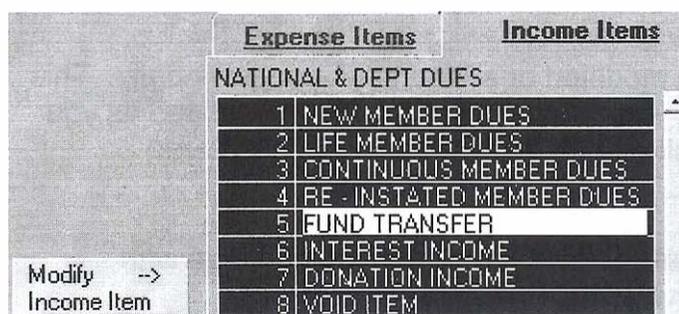
The pre-defined income list can be added to, renamed, and/or deleted to fit your specific needs. To modify this list first highlight the appropriate Fund (audit) Account. Then click on any item in the Income Item list. Click the 'Modify Income Item' button. Choose the desired function and follow the on-screen prompts.

*Note: Income Items **cannot be deleted once posted to a deposit.**
Expense Items

Defining expense items for each audit account provides you with extensive capabilities for managing your finances.

Each Fund (Audit) Account can have a list of up to 75 items for which you disburse funds. This allows you to maintain tremendous detail regarding your operations and helps in determining which areas are either profitable or costly to your operations.

VSS ships with a pre-defined list of expense items for each Audit Account listed.

Your list can be as detailed or as broad as you wish depending on your particular needs. However, you should keep in mind that each disbursement posted to a Fund **must** also include a specific expense (purpose) item.

An example might be...
If a $75.00 disbursement (check) is paid from the National & Department Dues fund, the most likely expense item would be some form of Dues income.

However, disbursements made from the Post General Fund or Post Canteen Fund could include a much broader range of items. Such as, clothing, food, soft drinks, etc. However, you may want to be even more specific and break these into smaller groups instead. An

example would be (clothing), hats, caps, shirts, jackets, etc. Soft drinks might be further defined as Pepsi, Coke, RC, etc. Providing this amount of detail will allow you to later retrieve more specific information about your operations. i.e., profit/loss from cap sales.

When defining your list of expense items for each Fund account, keep in mind these items will be available later for defining the purpose of each disbursement.
The pre-defined income list can be added to, renamed, and/or deleted to fit your specific needs. To modify this list first highlight the appropriate Fund (audit) Account. Then click on any item in the Expense Item list. Click the 'Modify Expense Item' button. Choose the desired function and follow the on-screen prompts. (See figure 2).

*Note: Expense Items cannot be deleted once posted to a disbursement.

It is important to note that these lists can be modified or added to as you work daily. This will allow you to begin working even though your lists may not be as well-defined as you may need at a later date. You can even make adjustments to previously entered transactions after modifying your lists.

Now that all Accounts and Item lists are established you are ready to continue with entering day-to-day transactions. i,e., receiving and disbursing monies.

CHAPTER 2.)

Entering Transactions

Figure 3.
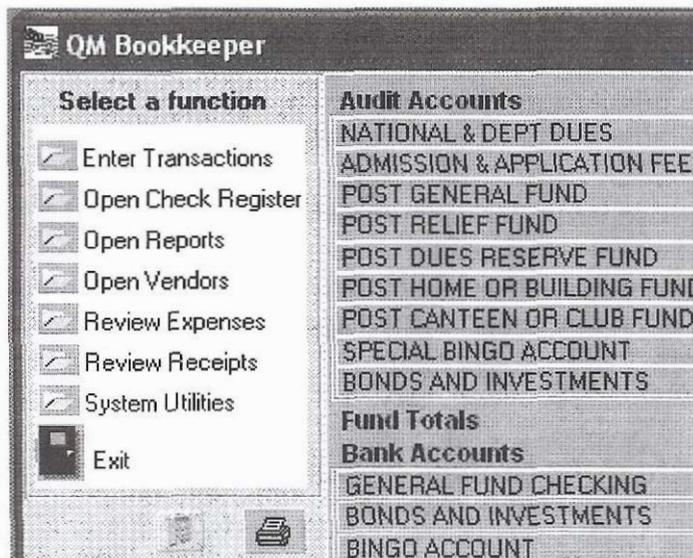
Clicking 'Enter Transactions' displays the following options...

Cancel
Log Disbursement
Transfer Funds
Post Receipts

Choose the desired function from this list.

Log Disbursement

Log Disbursement opens the Transaction Window
for posting checks.

Figure 4.
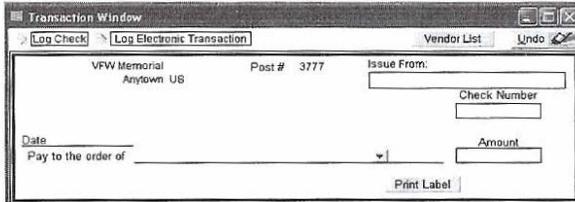
Choose the transaction type (Log Check) or
(Electronic Transaction).
See figure 4.
Note: the only difference in these types of
entries is the tracking of check numbers when
issuing checks.

Choose the appropriate Bank Account from the list.
Enter the correct check #, date and payee for this disbursement. (The Vendor list can be
updated automatically as payees are entered).

Enter the total amount of this check. Once entered, the check amount will display in a
dialog. If the check is a split item, enter a figure for the particular item. Click 'Ok'. At the
following prompt choose the Fund (audit) account to be debited for this item. Next, choose
the Expense Item being paid. Continue this procedure until all items paid with this check
equal the total of the check amount.

Once the item(s) amount and the total check amount equal you'll be prompted to post this
debit to all ledgers.
Repeat this process to continue issuing checks. Close the Transaction window when
finished.

NOTE: Each disbursement must include both a Fund Account and Expense Item in the Expense Description window.

Post Receipts
To post receipts select Post Receipts from the Enter Transactions menu.

Figure 5.

Enter the Deposit date (note: date format is mm/dd/yyyy).
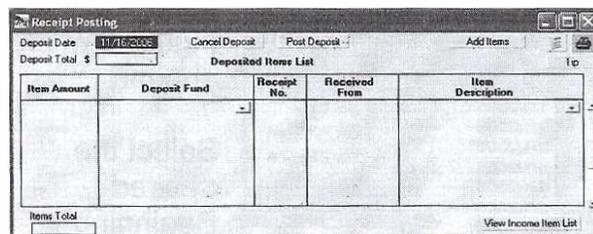
Enter the Deposit Total.
Enter each item of the deposit (for splits) to a
separate line in the Deposited Items area of the
window.

Use the 'Enter' key (keyboard) to move to a
new line entry of the deposit.

Each item **MUST** have a Deposit Fund selected (from the drop down list) and an Item
Description selected (from the drop down list).

When the deposited items total equals the Deposit Total you'll be prompted to Post the Deposit to system.

NOTE: Paid out items MUST be listed first in a negative value (-15.20) for the deposit totals to balance and be posted. Paid out items present appropriate the Expense Items for the Fund selected. These items are reported as expenses to the selected Fund.

That concludes the basics of entering the majority of your daily transactions.

Fund transfers within a given bank account should be done through the Account Maintenance options by adjusting the account balances. (Both Fund balances and Bank balances).
Fund transfers affecting different Bank Accounts should be done with the Fund Transfer options of 'Entering Transactions'. Select this option and follow on-screen prompts.

(See Figure 1.)
Now you are ready to compile, view and print the appropriate financial reports.

CHAPTER 3.)

Printing Reports (see figure 1.)

From the Main Books window (figure 1.), click Open Reports. QM Bookkeeping Reports window opens displaying the report options shown in Figure 6.

Figure 6.
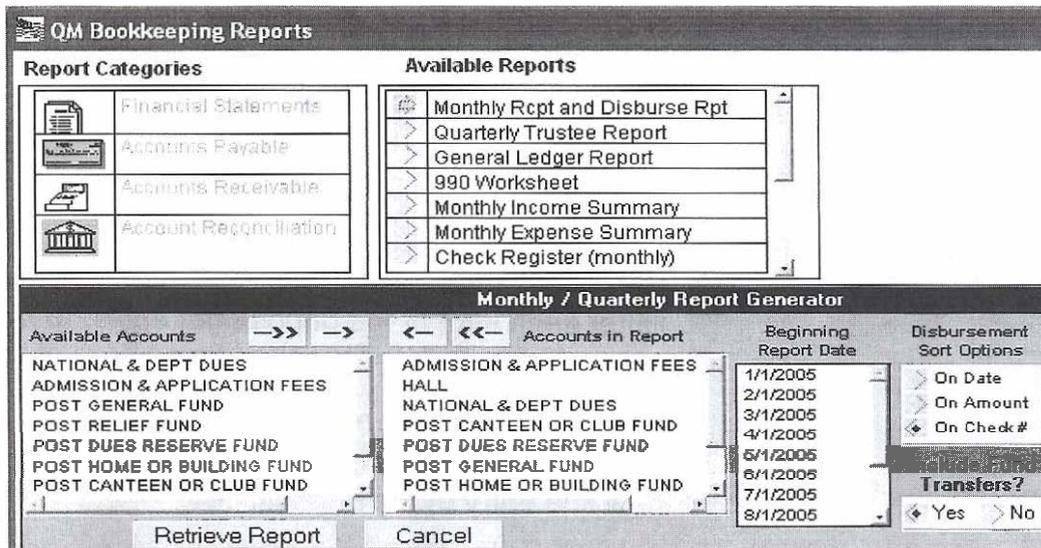
Select Monthly or Quarterly reports in the available reports list. The report options shown at the bottom of Figure 6 will appear.

Select the desired Beginning report date from the drop down list.

Include or Exclude the Funds to be calculated in the report. Select the Disbursement Sort

Order (on check # is default).

Click the 'Retrieve Report' button. The selected report will be displayed containing the transactions made and Fund changes during the selected period.

NOTE: Monthly reports cannot be generated for the selected month until the prior month's ending balances have been posted.

To print the selected report, choose 'Product Report' from the menu. Select the No. of copies desired. Click 'Ok'.

Closing the Monthly report will prompt you to Post Ending balances. It is safe to Post the balances, as they are replaced with new figure each time the report opens when and if changes occur.

All other reports in the Report Generator will open automatically when data is available which meets the criteria for the report.

Once monthly reports have generated and posted for any fiscal quarter, the corresponding Quarterly report can then be generated. To produce the Quarterly Report, select Open Reports (figure 3). Select the Quarterly Trustee Report (figure 6). Choose the fiscal quarter to generate. Click 'Retrieve Report'.

After generating the Quarterly Trustees Report, you can then access the Audit Report form (described on page 16 of the previous section of this manual). Enter the figures from your newly generated QM Books quarterly report.

There are also numerous additional report options available from within the special features of QM Books.

Additional Report Options

Review Receipts (see Figure 1)
Review Expenses (see Figure 1)
Open Check Register (see Figure 1)
Open Vendors (see Figure 1)

Click the Print button on any of these windows to retrieve reports specific to each category.

Click the printer button on the QM Books Main window to access additional specialty reports detailing transaction entries.

Correcting Transaction Entries

If you make an entry error when posting transactions, corrections can be made after the fact.
There are numerous ways to accomplish this.

Expense errors can be corrected by Open Expense Review window. Locate the transaction in question. Click the Corrections button. Select the proper correction to be made.

Receipt entry errors can be corrected in the same manner by opening Receipt Review. Locate the transaction in question. Click the Corrections button. Select the proper correction to be made.

If the needed correction cannot be made, open the Check Register (figure 1). Locate the incorrect item in the appropriate check register. Highlight the item. Click the 'Delete/Void' button above the check register. Choose 'Delete'. The item must then be re-entered via the proper Transaction Entry method.

System Utilities

Selecting this item from QM Books Main window provides for System Maintenance functions.

These include:
Post Data... provides for data needed to properly prepare the Quarterly report (See setup section).
System Restore and Backup Functions.
Initialize New Year... Reset system for starting a new fiscal year.
Re-set Fiscal Year

Preferences... Contains options for:
Assigning password protection
Optional Check Printing (check form number provided)
Assigning external program options for Spreadsheets and Word Processors.

Additional assistance is available at the following locations:

http://www.vss-software.com

VSS Technical Support Phone 573.204.7824

e-mail support@vss-software.com

VSS QM Membership

Basic Training Manual

presented by

Veterans Software Services

Table of Contents

Introduction

QM Membership Pro is designed around the VFW Membership application. However, while the membership application is the foundation of Membership Pro, the data tracking capabilities have been greatly expanded. This provides with the ability to track all information of the application and to also maintain additional useful information not contained in the application. For instance, e-mail addresses, secondary phone no's., and much, much more.

And, when coupled with internet access, this robust program provides for on-line roster update from the National web-site. When this feature is used, member records will be automatically updated with Dues paid status, address changes and name changes.

QM Membership Pro is packed full of reporting features as well. All information contained in the roster can be reported instantly with only a few mouse-click selections.

Let's get started organizing your membership records.

Getting Started (creating the member roster)

Upon your initial launching of QM Membership, the Main window will open. Your system contains no member records.

Figure 1.
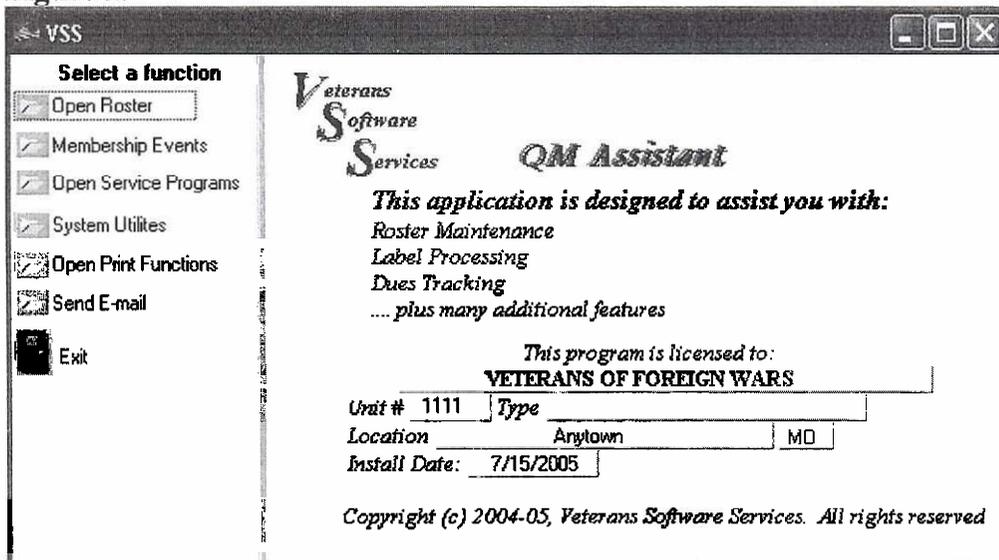
At this point you have 2 basic options for getting started.

Click 'Open Roster'. Select one of the options for inputting member records.

Option 1(**Importing from Download**) requires that you download the roster file discussed on pages 9-14 of the
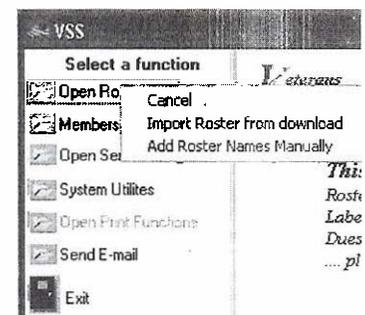
previous section of this manual.

When choosing the Import option the following message will be displayed.

Getting Started ☒

ℹ You need to complete the Post Info form to continue.

[OK]
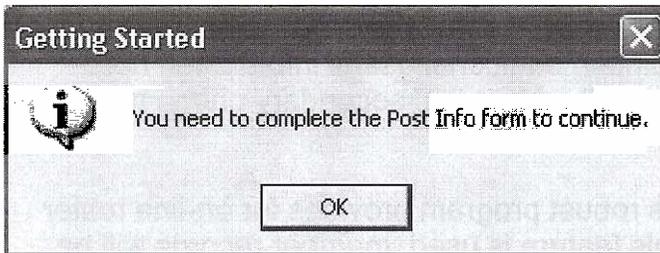
Click Ok. The Post Data window will open.

Complete all sections of the Post Data window.

All items are important. However, you cannot exit this window until all Dues amounts have been entered.

Click 'Save' to continue creating your Member roster.

The Roster Maintenance Utility window will open.

VSS Post Data

Enter Data then Save

Organization:	VETERANS OF FOREIGN WARS

Post No:	1111	Post Name:	VFW Memorial

Quartermaster: Any QM

Address: 1 Main Street

City: Anytown St: MO Zip: 11111

Post Phone: 785-762-5774 Home phone:

Post Dues: $0.00 Dept dues: $0.00 National dues: $0.00

App Fee: Membership Year 2006

Post Quota: 405 Division:

🔄 Undo ✔ Save
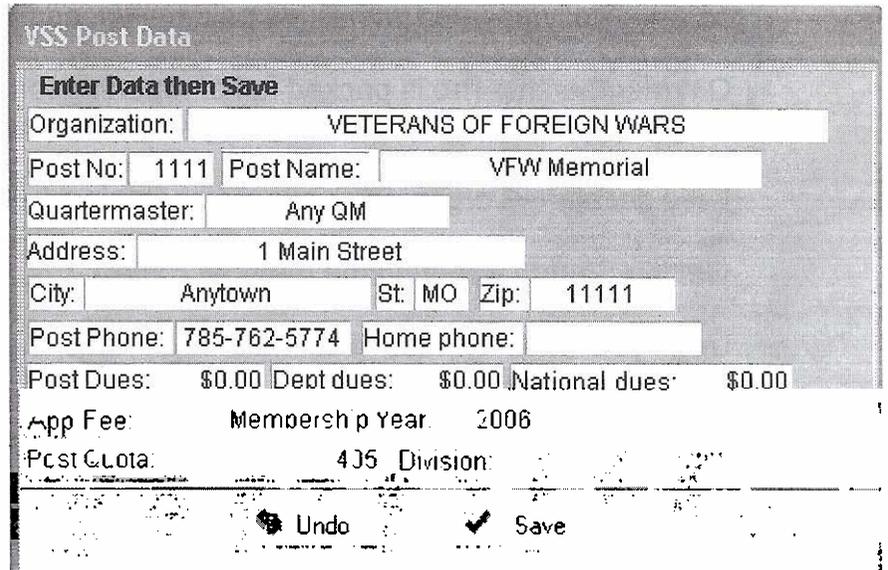
Click 'Roster Utilities'. The menu options will appear as follows;

Roster Maintenance Utility _ ☐ ☒

◆ **Roster Utilities** 🚪 Close

Cancel

Import Roster ▶	Import from Department
Initialize New Year	Import from National
Update Roster ▶	Import from VSS (recommended)
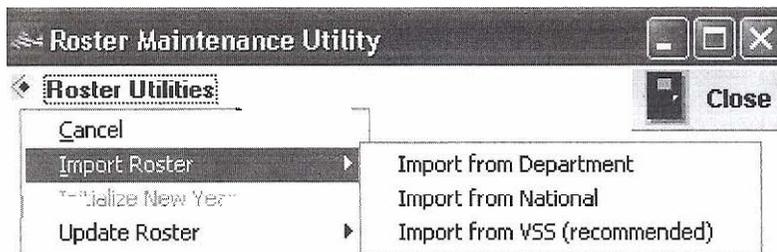
Choose the option indicating where your roster file originated.

If the file was downloaded from the National Memstats download, choose 'Import from National'.

If you retrieved the file from your Department or from VSS, choose one of these options.

Your file browser window will then open.

Use the down arrow located in the 'Look in:' line to locate the folder where the downloaded file is stored.
Note: If the file does not appear in the browser window, change the 'Files of Type' option to 'Comma Separated Files'.

Select File ☒

Look in: 📁 updates ▼ ← 🗀 📑 🎛▾

📄 All.csv

File name:	rstr.csv		Open
Files of type:	Comma Seperated Files *.csv	▼	Cancel
Alias:	📁 updates:	▼	Help
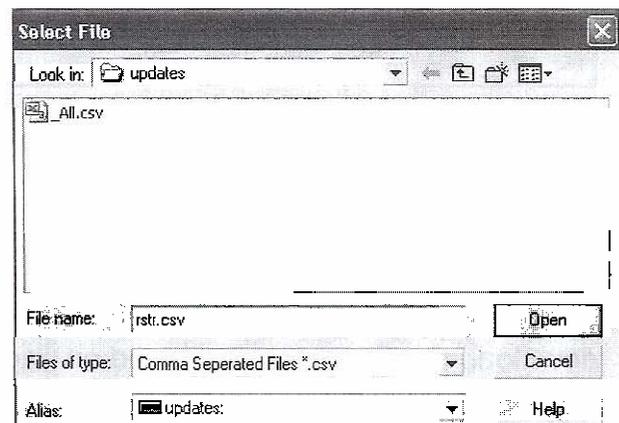
The downloaded file name will then appear
in this window. Highlight the file. Click 'Open'. You'll be notified that the file located is
correct. The file will then be used to create (build) your member roster. When the process
is completed click 'Close'. You'll now return to the Main window (figure 1).

Now click 'Open Roster'. Your member records will be listed in Alphabetical order by Last
Name.

Option 2. (Adding Names Manually)

This option provides for the input of each member individually, one at a time.
To build your roster in this manner, enter a unique member number for each record you
wish to enter. Once the number is recorded a second window will appear as shown below.
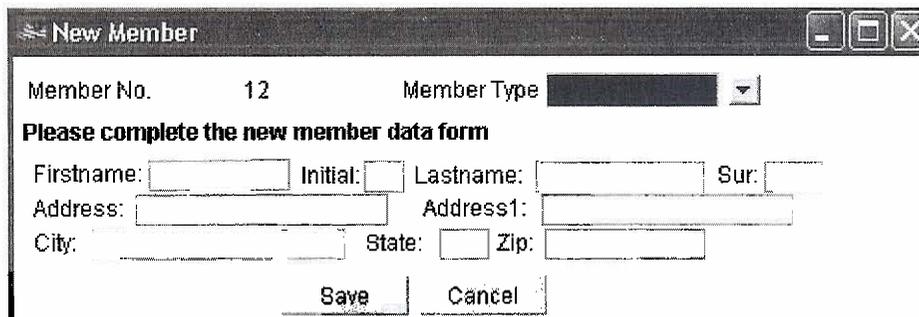
Enter the requested
information in this
window. Then click
'Save'. Cancel will
discard your entry.

Repeat this process
until all member records
have been entered.

Note: After the system contains one member record, the roster window can be accessed
for further functionality. In this manner you could enter a few records per session while
achieving total system access while building your complete roster.

With this accomplished we'll continue on to the Roster window and explore the
functionality of the system.

Working with VSS QM Membership

Once you've initialized your system, each time you start QM Pro, the Main Application window opens. (See Figure 1).

This window provides for accessing the functions displayed in Figure 2.

We'll discuss each of the available functions in the order they appear.

Figure 2

VSS

Select a function

- Open Roster
- Membership Events
- Open Service Programs
- System Utilites
- Open Print Functions
- Send E-mail
- Exit
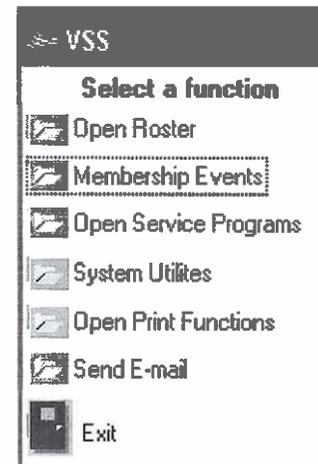
Clicking on Open Roster will display the window shown here (after initial roster entries have been made).

Figure 3.

The VSS Member Roster

The roster contains the records of all members placed in the system.

Names are sorted alphabetically by Last Name and are displayed one record at a time.

Navigation (locating a record) can be accomplished in several ways. By placing the cursor in the Last Name field begin to type the first few letters of the name you wish to locate. As you type, the system will progress to the first record matching the letters as they are entered. This is basically an auto-located.

The page Up, page Down keys will move up or down one record in the roster as the keys are pressed. The locate button (above roster) also allows you searching by either Last Name or Card No.

Editing Records

Records can be edited directly by placing the cursor in the desired field and typing the desired data. (enabled fields only). You'll be prompted to save any changes made when you leave the record that has been edited.

Some special editing functions are reserved to be done from the edit toolbar display.

Figure 4.

This toolbar is located to the right of the record detail and should be used to perform the functions listed.

These special functions are handled in this way to minimize the possibility of user error and to ensure proper data maintenance for reporting (printing) purposes later.
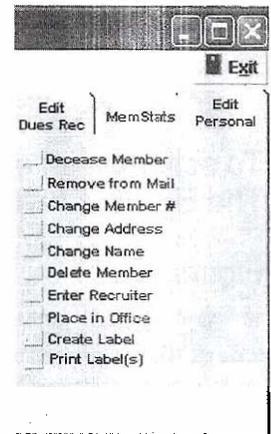
As you move from one area of the detail section to another, notice a new set of functions become available in the edit toolbar display.
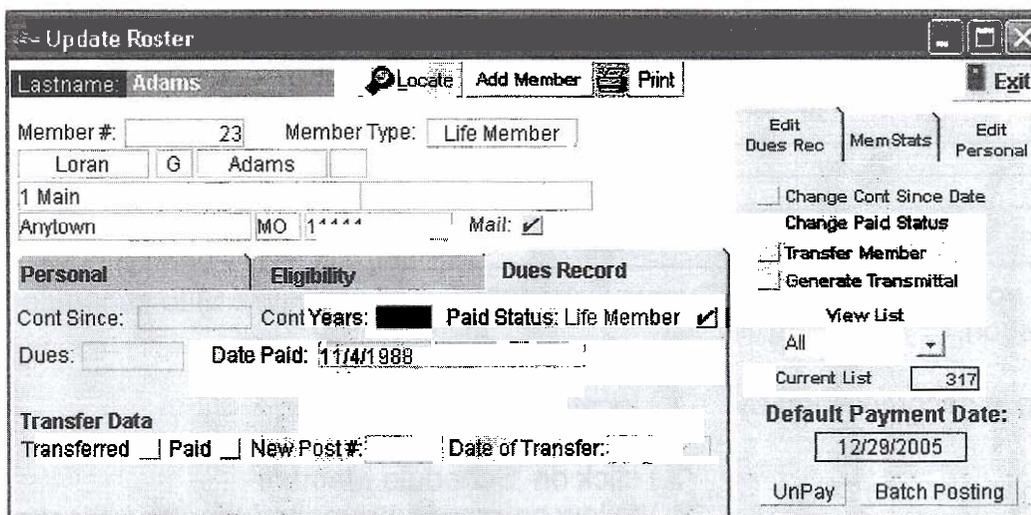
Figure 5.

This provides you with complete control and accuracy in maintaining your roster.

The memstats section of the toolbar reports the current paid status of all member records maintained in the roster.

New members can be added on-the-fly by clicking the 'Add Member' button above the roster. Print functions can also be accessed by clicking the 'Print' button.

Let's move on to the next section of the Main window (figure 2.)

Membership Events

Figure 6.

Event Scheduling allows you to schedule events and then maintain records of members' activity for the event.
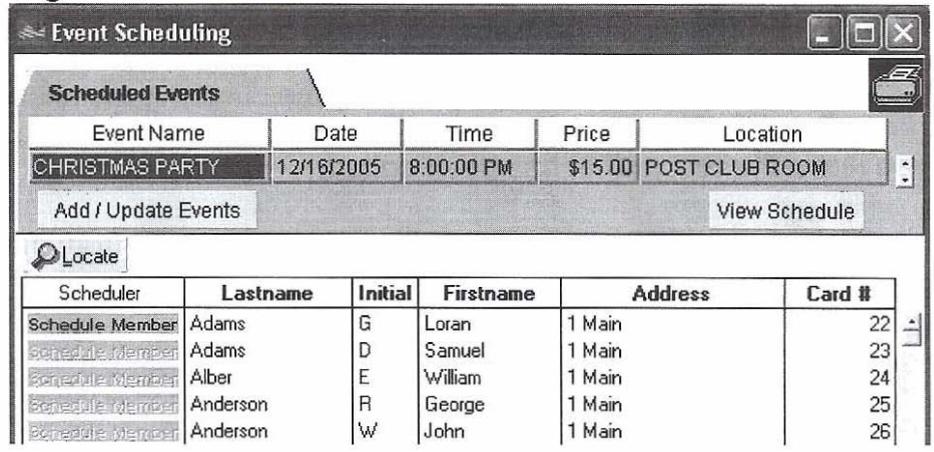
To schedule an event, click Add/Update Events (figure 6)
The Events Calendar will open. (figure 7)

Figure 7.
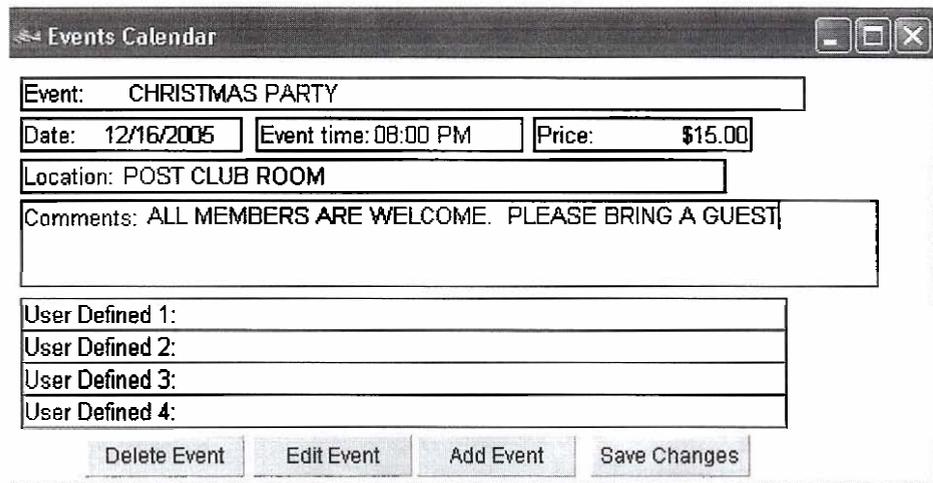
Click Add Event to enter a New Event to the Calendar.

Delete Event will remove the selected event.

Edit Event allows for editing the selected event.

Once Event(s) have been scheduled, you can return to the Events Scheduling window (figure 6) to schedule member participation.

Event Scheduling is accomplished by:
1.) locating the proper event.
2.) locating the proper member
3.) click on 'Schedule Member'
4.) follow on-screen prompts during this process

You can generate Event reports by clicking the printer button at the top of this page.

Open Service Programs

This is a powerful function of the application, as it allows you to enter and maintain and report data about your community service activities.

Figure 8.

QM Pro ships with 7 pre-defined program categories. These can be edited, deleted or add to as needed.

Program activities within each Category can also be added, edited or deleted as needed.

To add a new ACTIVITY to a CATEGORY highlight the proper activity. Under the Program Activities list box, click 'New Activity'. Type the name of the new activity. Repeat this process for each activity your post or auxiliary is involved with.

To track the member contribution to a given activity, highlight the correct activity. In the Auxiliary and Post sections of the activity report, enter the # of members participating, total hours and money contributed. Enter the dates the report pertains to. The data entered will be included in the Programs report. Clicking the printer button will produce this report or it can be produced later through Open Print Functions (figure 2).

System Utilities

Clicking this button opens the Roster Utility window. (page 6)
Once opened, click 'Roster Utilities'. The following options are displayed.

Here's a brief description of these functions.

Initialize New Year	Re-sets system for a new membership year.
Re-build Roster	Starts complete re-build of the roster from downloaded file (see Getting Started).
Set Update Preferences	Select the roster items you want updated from the file downloaded.
System Backup	Performs complete system backup to selected media.
System Restore	Restores data to system from backup media.
System Settings	Select system Printer and Display (monitor) Settings
Update Roster	Update roster files with data from downloaded file.
Update Post Info	Make changes to Post Data window (see getting started, page 6).
Update Post Officer List Options	Add/change office available officer titles
Update War Eras	Add/Change membership Eligibility criteria
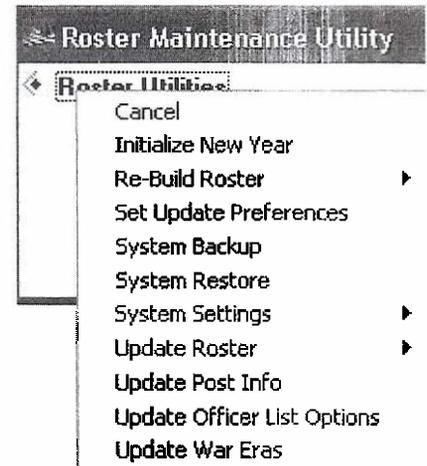
Open Print Functions

Figure 9.
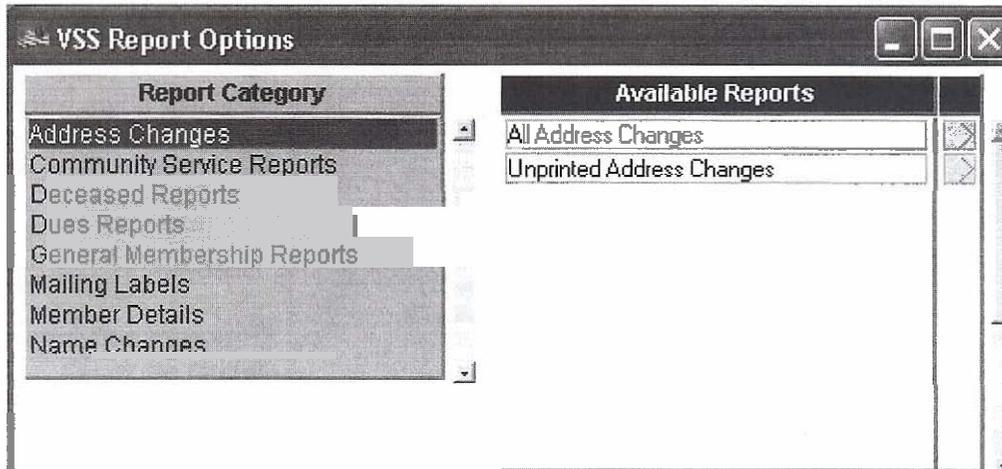
All reporting functions are broken it categories.

On the left side each category is listed. When highlighted, all reports within the category are listed.

Click the button next to the report

name you wish to print. All reports are available to either 'View' or 'Print'.

Explore both the Report Category list and the Available Reports list to see which reports will best suit your Explore both the Report Category list and the Available Reports list to see which reports will best suit your reporting needs.

We will detail using the Label Print Options. This is a powerful tool in managing your post membership functions.

Figure 10.
Printing from General M

Printing labels is easy in QM Pro.

1. In the Group Label options box, select a group of members you want labels for.

OR

Select an item from the Special Label Options box.
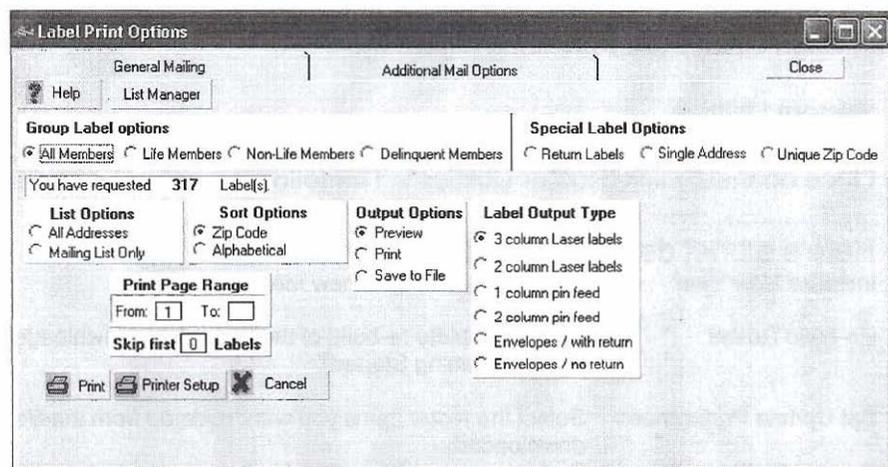
2. Select the List type from the List Options box. Selecting 'Mailing List Only' will suppress printing of labels that have been removed from the mail list (see figure 3).

3. Choose the Sort order for your labels
4. Choose the label format from the Label Output Type box.
5. Choose a label output option from the Output Options box.

When all criteria have been selected, click 'Print'. You'll be notified of the total no. of labels needed to complete the request.

Additional Mail Options

This feature allows for maintaining addresses and generating labels for parties outside of your post roster.

You can also print a single address by entering the

Figure 11.

address information and clicking 'Print'. Follow the on-screen options to do this.

Creating Lists
To create a list of addresses for printing regularly, click 'List Manager' and select 'Create New List'. Enter the name of the list you wish to store the addresses to. i.e., 'Auxiliary Members' would be a good list name for your Auxiliary member addresses. The system will allow as many lists as you desire. For example, you may want to keep a list of Post Officers, State Officers, etc.

Once the list has been created, type the address information of the party you want added to the list.
Click the 'Add to List' button. Select the desired list name to place the address into.

Printing Lists
Choose 'List Manager', 'Print List'. Select the name of the list to print. The labels for all parties on this list will be displayed. Determine the number of labels needed and insert into printer. Click the 'Printer' icon from the label menu (top of page).

Compile Zip Count Report
Choosing this option will generate a report containing a count of all records printed within each zip code of the labels printed. This report is useful for bulk mailing requirements.

We now have 2 items remaining in our QM Pro Functions menu.

Let's move on to Sending E-mail.

Sending E-mail

Figure 12.

This feature allows you to quickly add e-mail contacts to your e-mail address book.

New Contacts
To enter e-mail addresses, click 'New Contact'.

Enter the information for each field. Click 'Save'.

When all addresses are entered, click 'Exit'.

Sending E-mail

Click the 'Send' button located on the record of the address you wish to address. Type your e-mail message in box 4. (Your Message). When finished, click 'Send' (above message box, figure 12).

Be sure you're connected to the internet or e-mail delivery will fail.

Attaching Files
To attach a file to be delivered with your message, place a checkmark in the 'Attach File' box. When you 'Send' the message your File Browser will open. Locate the file (see Sending and Receiving E-mail, page 22 of the previous section).

The selected file will be attached and delivered to the selected recipient.

Exit

Exits the system and returns to Windows Desktop
We strongly suggest that you make a backup (see System Utilities) prior to exiting the system if you've made substantial changes to the records in the roster.

Additional assistance is available at the following locations:

http://www.vss-software.com

VSS Technical Support Phone 573.204.7824   e-mail support@vss-software.com