admin bandit®

software for volunteer treasurers

USER MANUAL

Part 6

- Membership Reports

Software for the benefit of community group treasurers and the peak bodies supporting them

PART SIX

Welcome to the Part 6 of Admin Bandit's user manual ... where we learn about the software's **Membership Reports**.

Essentially, this part shows you how to create lists of your organisation's members, either by name or the groups to which they belong. You can also examine just how much income is derived from membership fees.

CONTENTS

Membership Reports

Your **Membership Reports** provide data about your members, including numbers, the groups they belong to, the payment status of their fees and general information on your organisation's income from fees.

Select **Membership Reports** in the **Reports** pull-down menu. The screen that appears, also called **Reports**, provides a choice of three reports to generate:

1. **Member Details Report**
2. **Member Fees Report**
3. **Groups Report**.

All provide some of the information from your **Treasurer's Report** — but, as in the last section, in far greater detail.

Note: if you have entered customised terms under the options menu the report names will be customised to your terms.

MEMBER DETAILS REPORT

The **Member Details Report** provides you with an electronic or printed list of your members and their contact details.

Naturally, this report is a valuable reference for your organisation's staff, ranging from those with administrative or committee responsibilities, and those in teaching or leadership positions. It goes without saying, though, that any report containing members' personal details is subject to privacy laws and, thus, is a sensitive document. For this reason, we recommend you develop a clear policy for who can access your **Member Details Report**.

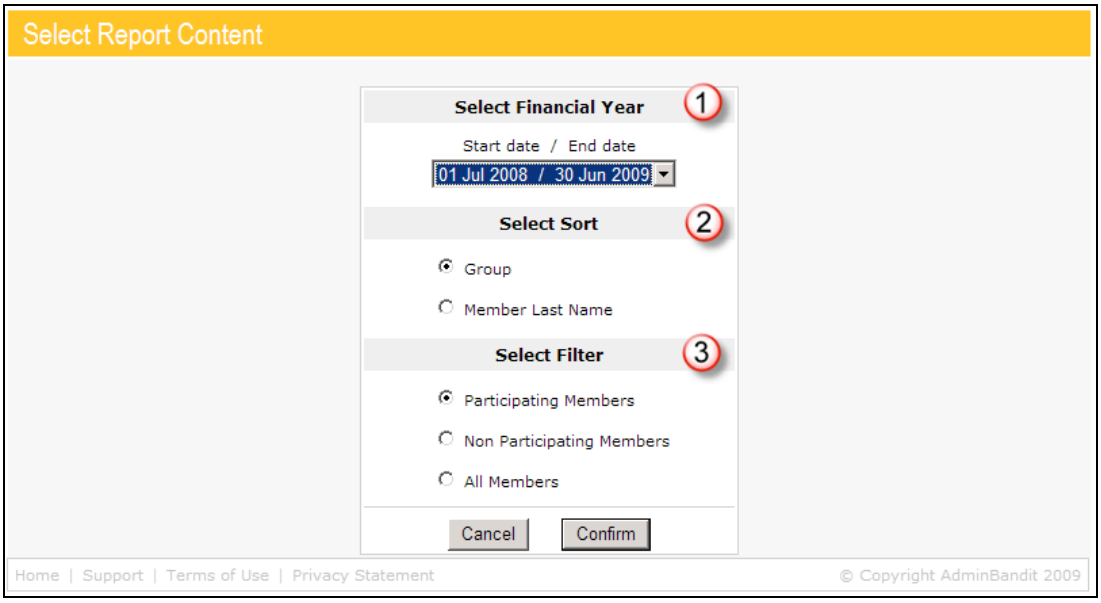
Okay, let's learn how to generate this document….

Select **Membership Reports** in the **Reports** pull-down menu on the main menu bar and a screen listing all **Member Reports**, appears.

Click the red **Member Details Report** link to activate a **Select Report Content** screen, which allows you customise what information your report contains and how it is displayed. This screen contains a box divided into three parts:

1. **Select Financial Year**: choose from those listed in the pull-down menu — if the start and end dates don't fit the format your organisation uses, make the required change in Client Details in the Options pull-down menu on the main menu bar (see chapter 2)
2. **Select Sort**: choose to have members arranged by the groups to which they belong or alphabetically by surname
3. **Select Filter**: choose to include:
    a. Only members currently participating in your organisation's activities
    b. Only members who are currently **not** participating in activities, or
    c. All members.

Now click **Confirm** to generate your **Member Details Report** or **Cancel** to stop and go instead to the **Transaction List**.



On proceeding, a **Report Generated** screen appears in record time, including a red **here** link for you click to download your report. When you activate this, the usual **Done** screen appears, as well as the **File Download** window, which gives you three choices:

1. **Open**: opens your reports in Adobe Acrobat
2. **Save**: prompts you to save your report as a PDF file
3. **Cancel**: aborts your report.

On the completion of any of the above, you'll be taken back to the **Reports** screen.

Understanding Your Member Details Report

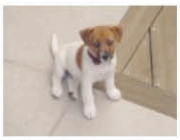
Your **Member Details Report** is an incredibly simple report. Having said this, there are two points to note:

1. As you can imagine, this report can be incredibly large, especially with an average of only four to five members per printed page. For this reason, we've only shown the first page in our example below (this is all you need, however, to understand the report)
2. Your report can take on a number of formats, depending on the arrangement and information you chose to include on the **Select Report Content** screen.

For the following key and sample report, we chose to include only those members participating in current fee periods, whose details we arranged by group.

1. Your organisation's logo (if you added this in **Client Details** in the **Options** function)
2. Your organisation's name
3. Report title
4. The information filter you selected on the **Select Report Content** screen, in this case, **Participating Members**
5. Financial year in question
6. Reminder that this is a confidential document that is subject to privacy laws — give only to relevant personnel
7. Our example arranges member details by group, in this case the Wallabies
8. Member details, as entered at **Add Member** or **Import Members** in the **People** tool

1



2 **Robyn Hood's Merry Men**

Member Details Report 3

4 **Participating Members**

5 YEAR: 2009

(only to be seen by the Treasurer and relevant Team Manager/s) 6

7 **Wallabies**

8

Member ID:			
First Name:	Liem	**Address Line 1:**	
Last Name:	Beiley	**Address Line 2:**	
Mobile:	0525 779 532	**City:**	
Phone:	0528 220 922	**Country:**	
Email:		**State:**	**Postcode:**
Parent Name:	Jodie & Bem Murrey	**Parent Email:**	jodieberr@three.dom.eu
Second Contact:		**Second Contact Email:**	
Third Contact:		**Third Contact Email:**	

Member ID:			
First Name:	Eleemor	**Address Line 1:**	
Last Name:	Biohop	**Address Line 2:**	
Mobile:	0508 038 762	**City:**	
Phone:	0529 287 272	**Country:**	
Email:		**State:**	**Postcode:**
Parent Name:	Kerem & Stevem Melem	**Parent Email:**	kerem.melem@eihw.gov.eu
Second Contact:		**Second Contact Email:**	
Third Contact:		**Third Contact Email:**	

Member ID:			
First Name:	Olivie	**Address Line 1:**	
Last Name:	Bowem	**Address Line 2:**	
Mobile:	0507 856 267	**City:**	
Phone:	0539 275 552	**Country:**	
Email:		**State:**	**Postcode:**
Parent Name:	Kete MdNelly & Bermerd Williemo	**Parent Email:**	meioemt@three.dom.eu
Second Contact:		**Second Contact Email:**	
Third Contact:		**Third Contact Email:**	

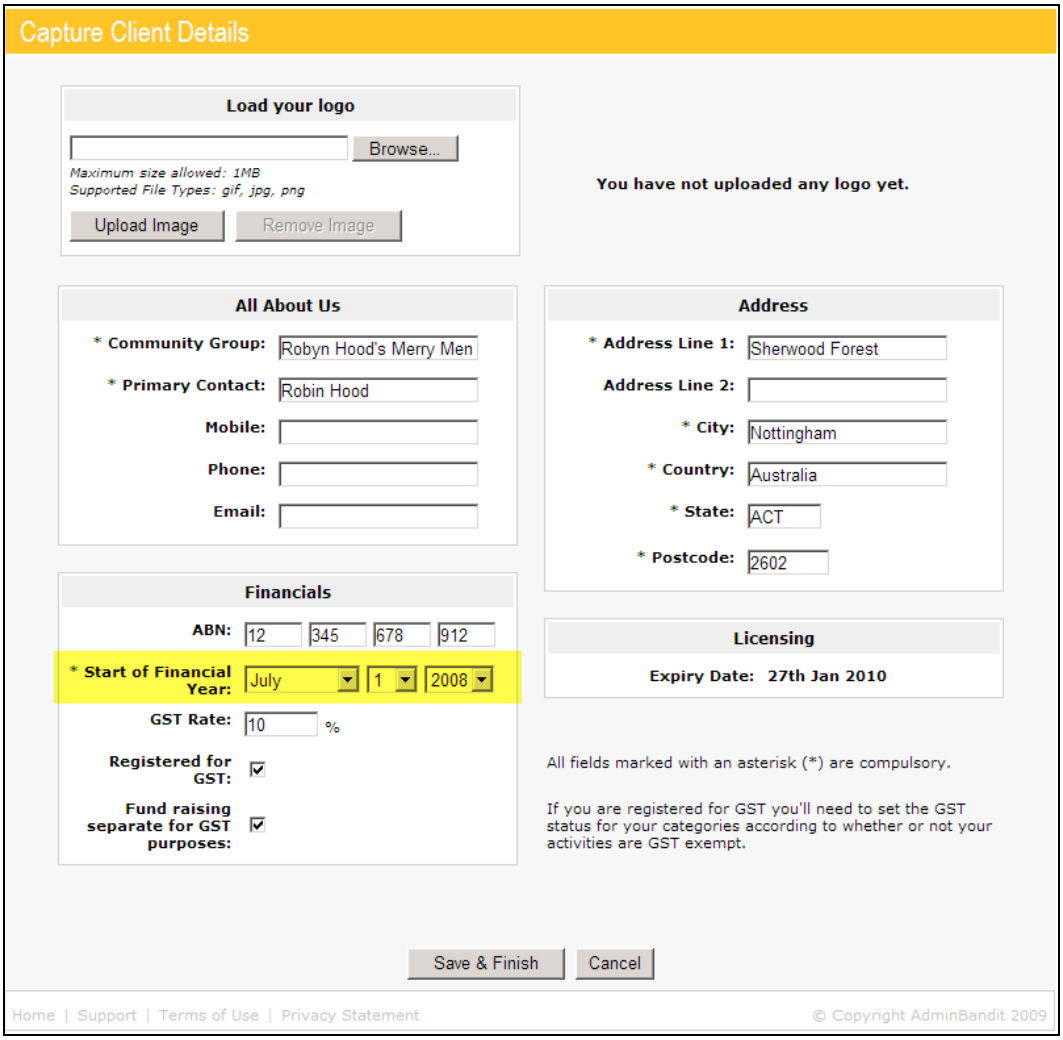
Member ID:			
First Name:	Merduo	**Address Line 1:**	
Last Name:	Cootello	**Address Line 2:**	
Mobile:	0537 307 225	**City:**	
Phone:	0500 575 225	**Country:**	
Email:		**State:**	**Postcode:**
Parent Name:	Meliooe & Stephem MdElhimmey	**Parent Email:**	mjhemkimoom@hotmeil.dom
Second Contact:		**Second Contact Email:**	
Third Contact:		**Third Contact Email:**	

MEMBER FEES REPORT

As the name suggests, your **Members Fees Report** is a list of your members and the payment status of their fees. Individuals are listed by name, which makes this a sensitive document, so we recommend you keep it confidential, limiting viewing to yourself, as treasurer, and appropriate committee members and team managers.

Select **Membership Reports** in the **Money** pull-down menu on the main menu bar and a screen, also called **Membership Reports**, appears. Click on the red **Member Fees Report** to be taken to a **Select Financial Year** screen. As the name of this screen suggests, you need to choose a financial year from the pull-down menu and click **Confirm** to continue or **Cancel** to cease generating your report, in which case you'll be diverted to the **Transaction List**.

So how does Admin Bandit know the structure of your financial year? You entered this into the system at **Client Details** under the **Options** menu. If you didn't, update it now.



When you click **Confirm**, a **Report Generated** screen appears, with a red here link. Click this to activate a **Done** screen and a **File Download** box, which allows you to:

1. **Open**: opens your report in Adobe Acrobat
2. **Save**: prompts you to save the report to your computer as a PDF file
3. **Cancel**: terminates the report download.

In each case, you'll be directed back to the **Reports** screens when your chosen action is complete.

As usual, we recommend you save your **Member Fees Report** as soon as possible.

Understanding Your Member Fees Report

Set out by group — with one group per page and a summary page at the end — your **Member Fees Report** provides an orderly summary of your fee income by individual members and groups.

The sample on the next page provides an overview of your **Members Fees Report**. Note that this sample isn't an entire report — category reports can be very long, so we've only shown the key pages.

1. Your organisation name
2. Report title
3. Year
4. Confidentiality notice
5. Group name
6. Member
7. Fee period
8. Fee due
9. Amount paid
10. Total fee amount due from group
11. Total fees received from group

12 Fees still owed by group

13 **N/a:** member is not participating in this fee period

14 **No:** no fees paid at all yet

15 **Summary Page:** provides a summary of total fees and group information

16 **Total Due:** total income expected from membership fees

17 **Total Received:** total income from membership fees received so far

18 **Total Still Owing:** total income from membership fees still unpaid and, thus, owing

19 Sample group

20 Sample fee period

21 Number of members for sample fee period

22 Percentage of fees received so far for this fee period

23 Percentage of fees received so far for this group

24 Total fees received from group so far

25 **Average % of fees received for this year:** total average from all groups

26 Total of all fees received for the year

27 Fees received in advance for next year (if relevant). A total of fees received late for periods from previous years will also appear here, if relevant. However, this doesn't apply to this sample, so is not listed

28 Total fees received

1 **Merry Men**

2 **MEMBER FEES REPORT**

3 YEAR: 2008

Confidential

4 *(only to be seen by the Treasurer and relevant Team Manager/s)*

5 **FIFTH GROUP**

6 CHILD	7 FULL YEAR	8 DUE	9 PAID
1 Affleck - Ben	No	$ 500.00	Nil
2 Brosnan - Pierce	$ 500.00	$ 500.00	$ 500.00
3 Craig - Daniel	$ 500.00	$ 500.00	$ 500.00
4 Damon - Matt	No	$ 500.00	Nil
5 Ed - Mr	No	$ 500.00	Nil
6 John - Little	No	$ 500.00	Nil
7 Jolie - Angelina	No	$ 500.00	Nil
8 Nottingham - Sherriff of	$ 0.00	$ 0.00	$ 0.00
9 Pitt - Brad	No	$ 500.00	Nil

10 **Sub Total Due from Fifth Group**	**$ 4,000.00**
11 **Sub Total of Receipts from Fifth Group**	**$ 1,000.00**
12 **Still Owed by Fifth Group**	**$ 3,000.00**

13 n/a = not participating

14 No = not paid anything

Merry Men

MEMBER FEES REPORT

YEAR: 2008

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(only to be seen by the Treasurer and relevant Team Manager/s)

15 **SUMMARY PAGE**

16 **TOTAL DUE** $5,127.50

17 **TOTAL RECEIPTS** $1,350.75

18 **TOTAL STILL OWING** $3,776.75

FIFTH GROUP

PERIOD	Full year	TOTAL
NUMBER OF MEMBERS	9	
CONTRIBUTION %	25.0%	25.0%

Fifth Group TOTAL FEES $1,000.00

19 ### FIRST GROUP

20

PERIOD	Jan08-Dec08	Oct08-Dec08	TOTAL
NUMBER OF MEMBERS	21 2	2	
CONTRIBUTION %	22 0.0%	0.0%	23 0.0%

24 **First Group TOTAL FEES** $0.00

FOURTH GROUP

PERIOD	July08-Sep08	Oct08-Dec08	TOTAL
NUMBER OF MEMBERS	3	2	
CONTRIBUTION %	33.3%	12.6%	25.0%

Fourth Group TOTAL FEES $100.75

SECOND GROUP

PERIOD	Jun08-Jul08	Aug08-Dec08	TOTAL
NUMBER OF MEMBERS	1	1	
CONTRIBUTION %	100.0%	100.0%	100.0%

Second Group TOTAL FEES $225.00

THIRD GROUP

PERIOD	Sep08-Dec08	TOTAL
NUMBER OF MEMBERS	2	
CONTRIBUTION %	25.0%	25.0%

Third Group TOTAL FEES $25.00

25 **AVERAGE % OF FEES RECEIVED FOR THIS YEAR** 35.0%

Merry Men

MEMBER FEES REPORT

YEAR: 2008

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(only to be seen by the Treasurer and relevant Team Manager/s)

26	**TOTAL OF ALL FEES RECEIVED FOR THIS YEAR**	**$ 1,350.75**
27	**FEES RECEIVED IN ADVANCE FOR NEXT YEAR**	**$ 150.00**
28	**TOTAL OF ALL FEES RECEIVED**	**$ 1,500.75**

GROUPS REPORT

Your **Groups Report** provides a useful snapshot of all the groups in your organisation, including default fees and member numbers.

Let's go back to **Money Reports** in the **Reports** pull-down menu and, this time, click on the red **Groups Report** link. As with the **Member Fees Report**, no screen asking you to select a date range appears — instead your report is instantly created and you're taken straight to a **Report Generated** screen. To download your report, click the red **here** link, which activates a **Done** screen, along with a **File Download** box, which allows you to:

1. **Open**: opens your report in Adobe Acrobat
2. **Save**: prompts you to save your report as a PDF file
3. **Cancel**: abandons your report.

After any of the above actions, you'll be directed back to the **Reports** screen.

As always, we urge you to save a copy of your report!

Understanding Your Groups Report

Your **Groups Report** is formatted into a simple and easy-to-read table. Let's go through the key details on the sample in the next couple of pages:

1. Your organisation name
2. Name of report
3. Year
4. **Group:** a list of all your groups by name
5. **Description:** any memo or note you made when you first created the group in Admin Bandit
6. **Default Fee:** if you set a standard fee when you first created the group
7. **Number of Members:** how many people are in the group

1 Merry Men

2 GROUPS REPORT

YEAR: 2009

	4 Group	5 Description	6 Default Fee	7 Number of Members
1	First Group	6 fees 2 members	$100.00	2
2	Second Group	3 fees-1 member	$150.00	1
3	Third Group	4 fees-3 members	$50.00	2
4	Fifth Group	1 fee-9 members	$500.00	9
5	Fourth Group	2 fees-3 members	$80.50	3
6	Sixth Group	no members	$300.00	0
7	Group name		$122.00	0
8	Test99		$0.00	0