



# **Approved Workman Database**

a recordkeeping system for Awana clubs

**Windows App Version 5.5**

# **User Guide**

# **AW Cloud Database - Windows App version 5.5**

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# **Chapter**

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**1**

# 1 Welcome to the Windows App



The Approved Workman Cloud Database is a recordkeeping system for Awana programs. It helps leaders be more accurate and efficient so they can do what's really important – *minister to children*.

The cloud database can be accessed by the Web App ([app.approvedworkman.com](http://app.approvedworkman.com)) or the Windows App (AWdbRemote.exe). All references in this User Guide apply to the Windows App.

This guide is designed as both a course in using the Windows App and as ongoing reference. It assumes familiarity with how to run an Awana program and focuses on how to use the Windows App.

## Conventions used in this User Guide

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Important warnings! Pay attention!!



Additional information for clarification.



Tips that might be helpful.

## How to get started...

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- Review the [Getting Started](#) and [Learning the Basics](#) sections for an introduction to the application.
- Visit the [Approved Workman Forum](#) for helpful information.

# **Chapter**

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**2**

## 2 Getting Started

- [Sign up for a Free Trial](#) of the Approved Workman Cloud Database. An email with instructions will be sent when it is ready and will include a link to [download the Windows App \(AWdbRemote.exe\)](#).
- Use the demo to [learn the basics](#) and explore features with the sample data.



Do not enter live club data in the demo database. It will be deleted after the trial period.



The demo database may also be accessed using the Web App. For information see the [Web App support page](#).

- [Purchase a subscription](#). A new (empty) database will be created to begin using live.

### 2.1 Minimum System Requirements

To run the Windows App, system configurations should meet these requirements:

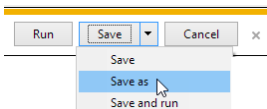
- Operating Systems: Microsoft Windows 11, 10, or 8 (Apple and Linux OS's are not supported)
- Minimum RAM: Windows 11, 10 or 8 require 1 GB, but 2 GB or more is recommended
- Free Disk Space: 200 MB
- Display: A minimum screen resolution of 1024x600 is required, 1024x768 or higher is recommended
- Internet Connection: the Windows App connects to data in the cloud, so requires an internet connection

### 2.2 Downloading the Windows App

Use the link included in the setup email or download the Windows App [from our website](#). Place the executable (AWdbRemote.exe) on the desktop to make [updates](#) easier.

From the download page:

1. Click the "Download Now" button.
2. In the File Download dialog, click the drop-down menu and select **Save As**. Select the Desktop and click **Save**. The file download progress is displayed.



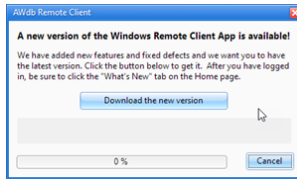
If there is no dialog to indicate where to save the download, check the Downloads folder. Use cut/paste to move AWdbRemote.exe to the desktop.

3. The AWdbRemote icon will show on your desktop.



## 2.3 Updating the Windows App

The Windows App will periodically be updated to provide bug fixes and enhancements. When a new version is available, a download button will be provided after log-in.



1. Click **Download the new version**. A progress bar will show the new version is being downloaded.
2. When it completes, the dialog will close and the new version will launch the log-in screen again.



The cancel button can be used; however, the update process can't be skipped. When logging in with a version that is less than the newest one, the download option will be presented.



When the file is replaced, it won't be in the same location on the Desktop as it was before, but it will still be there. Simply drag it back to the preferred location.

## 2.4 Contacting Customer Support

**Quality Customer Support is important to us!** We are committed to providing great support to Approved Workman users! Although much time, effort, and care has gone into the development and testing of this application, we acknowledge that no software is ever totally bug free.

For problems not addressed in the included documentation, please contact Customer Support:

- E-mail: [support@approvedworkman.com](mailto:support@approvedworkman.com)
- Phone: (see the [Approved Workman website](#) for our support number)

The [Approved Workman Forum](#) provides helpful information and resources. It provides a place to report problems, make enhancement requests, review FAQs, and watch training videos as well as ask and answer questions and share ideas with other Approved Workman users.

# **Chapter**

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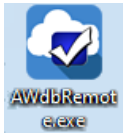
**3**



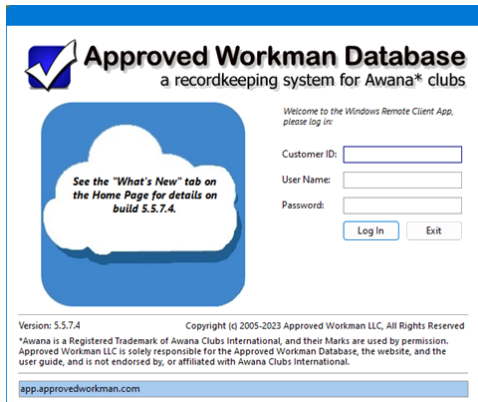
### 3 Logging into the Windows App

To log in to the Windows App:

1. Double click the **AWdb Remote icon** on your desktop to open the Log-in dialog.

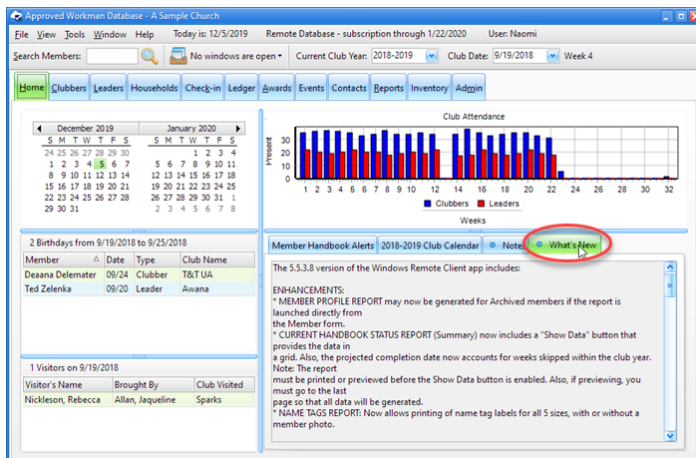


2. Type the **Customer ID**, **User Name** and **Password** for a [user account](#).



Notifications are given in the cloud area.

3. Click **Log In**. In a few seconds, the [Main Window](#) opens. The **What's New** tab on the [Home page](#) provides a list of enhancements and fixes when there is a new version.



# **Chapter**

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**4**

## 4 Learning the Basics

The Windows App consists of modules that work together to maintain records for an Awana program. Each tab on the Main window represents a module and has a chapter in the User Guide explaining its functionality. This chapter summarizes the basic information. Use the navigation tools (forward and back links, and topic links) to return to this page to continue with the next step.

### Introductory Walk-through

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1. [Log in](#) to the database.
2. Get familiar with the [Main Window](#), including an overview of the different Modules.
3. Review [Club Setup](#) to adjust point values and personalize items like logos.
4. Enter [church and club information](#) so it prints on reports and can be used on order forms.
5. Review customizations under the [Options](#) tab.
6. For fun, personalize the database's [look and feel](#).
7. Begin [entering member records](#).
8. [Assign members to teams](#), [assign handbooks](#) and [uniforms](#).
9. Preview reports that might be useful getting started:
  - [Registration Forms](#) - for clubbers or leaders; blank or pre-filled
  - [Name Tags](#) - various sizes, with or without photos
  - [Medical list](#) - communicate medical conditions and allergy information with leaders
  - [Worksheets](#) - record attendance if no computer is available at check-in time
  - [Detailed Handbook Status](#) report or [Check-in and Progress Report Worksheet](#) - mark completed sections if no computer is available during handbook time
  - [Household and Member ID List](#) - get a parent's initials when picking up a clubber
  - [Birthday list](#) and [Award list](#) - use during the closing ceremony
  - [Clubber Contact Information](#) - facilitate sending encouragement and birthday wishes
10. Use the [Check-in Module](#) to keep track of attendance, [points](#), and [dues](#).
11. Mark [handbook sections as completed](#) and [pull awards](#).
12. Learn how to to [work with the grids](#) to generate ad-hoc reports.

After learning the basics, continue [beyond the basics](#)!

### 4.1 Customizing the Database

The look of the Windows App can be customized by changing the "skin" and the tab positions.

#### Choosing a Database Skin

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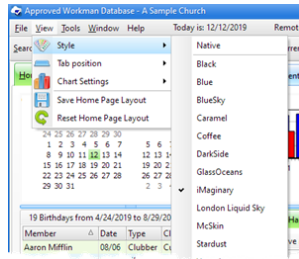


A "skin" is a collection of style settings that affect the look and feel of the Windows App. Each skin has a different color scheme and might slightly alter the proportions of tabs, buttons, and text.



Most of the screen-captures in this manual use the "Imaginary" style.

To change the skin, select **View > Style** from the [Main Window's](#) menu bar. A submenu opens with a list of styles. When a style is selected, the app is immediately updated.



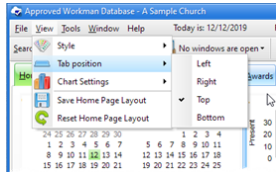
## Choosing the Main Window's Tab Positions

The [Main Window's](#) tabs can be displayed along the top, bottom, left side, or right side.



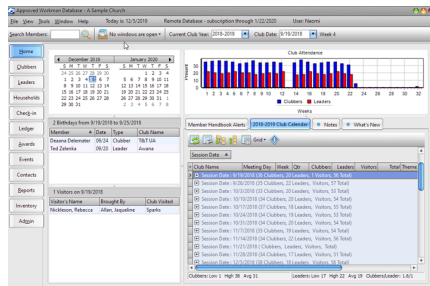
The default tab position is a horizontal row at the top of the Main Window. Most of the screen-captures in this manual show the tabs along top.

To change the tab position, select **View > Tab position** from the [Main Window's](#) menu bar. A submenu opens with the options. When a tab position is selected, the app is immediately updated.

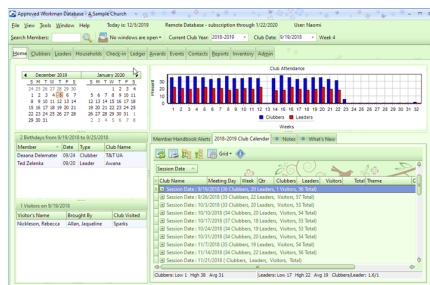


### 4.1.1 Screenshot Examples

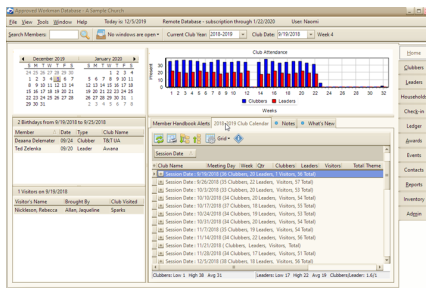
#### "McSkin" with Tabs on Left



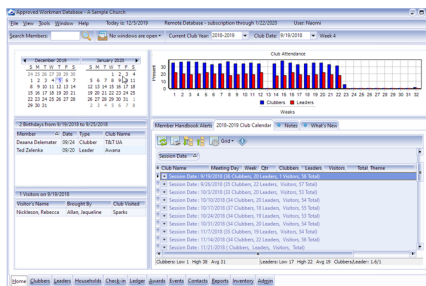
#### "Spring" with Tabs on Top



## "Coffee" with Tabs on Right



## "Stardust" with Tabs on Bottom



## 4.2 Entering Clubbers and Leaders

Be sure you are using a Live database before entering member data!!



The demo database is deleted and a new database created with a subscription, so members entered in a demo database will be lost!

To create a new member, use one of the following to open the **New Member dialog**:

- [Clubbers](#), [Leaders](#), or [Check-in](#) module toolbar: **New Member** button
- [Member Window](#) toolbar: **New in Household** button
- [Registration Window](#), Step 1 grid toolbar: **New Clubber (in this Household)** button



Some modules also have a right click pop-up menu option to add a member.

Enter the following information:

- **Type** - Clubber or Leader
- **Status** - choose Active, Prospect or Visitor. For a Visitor, indicate the **Date Visited**. If the person **Is a guest of an active member**, select the member's name from the drop-down list.
- **Is a member of an existing household** - check the box and select the household from the drop-down list to populate the Household information.



The list of households defaults to Active and Visitor households. If the household is not in the list, check the box to **Show all households regardless of Status**.

- **Personal - Title, First Name, Last Name, Suffix, Preferred Name, Birth Date and Gender**



Some fields are filled automatically as data is entered (i.e. selecting a **Title** fills in **Gender**; entering a **Birth Date** calculates **Age** and **Grade**. With gender and grade, a **Club Name** is assigned.)

- **Household - Parent Name(s), Address, Primary Phone, Primary Email address, and Family Church**
- **Primary Role - Grade, Club Assigned, Leader Name, Team Color and Team Name**



It is generally easier to [Assign a team](#) from the main [Clubbers list](#) for [multiple members](#) at once.

**Save and Close** - saves the record, closes the dialog and opens the [Member record](#)

**Cancel and Close** - closes the dialog without saving

### 4.2.1 Entering Contact Info



Capturing contact information, such as phone numbers and e-mail addresses, facilitates communication. This information is entered for the entire household. It is shown on the [Main](#) page of any household member's record in the **Contact Info** grid.

The screenshot shows the 'Contact Info' grid for a household member. The grid has columns for Type, Phone Number or E-mail Address, Member Link, Contact Person, Contact Relationship, Cell Carrier, Ok to Text, and Primary/Private. The data in the grid is as follows:

Type	Phone Number or E-mail Address	Member Link	Contact Person	Contact Relationship	Cell Carrier	Ok to Text	Primary/Private
E-mail	carsons@carson.com					<input type="checkbox"/>	<input type="checkbox"/>
Home Phone	(608) 555-1278		Jim Carson			<input type="checkbox"/>	<input type="checkbox"/>

- To remove a contact record: select a row in the grid, then click **Del** above the grid or right click and choose **Del Phone/E-mail**
- To change a contact record: double-click on the selected row; or select a row in the grid then click **Edit** above the grid; or right click and choose **Open Phone/E-mail**
- To add a new contact record: click **New** above the grid



Adding or editing a contact record opens the E-Contacts dialog.

The screenshot shows the 'E-Contacts' dialog box for a household member. The dialog has a table with columns for Type, Phone Number or E-mail Address, Member Link, Contact Person, Contact Relationship, Cell Carrier, Ok to Text, and Primary/Private. The data in the table is as follows:


Type	Phone Number or E-mail Address	Member Link	Contact Person	Contact Relationship	Cell Carrier	Ok to Text	Primary/Private
E-mail	carsons@carson.com					<input type="checkbox"/>	<input type="checkbox"/>
Home Phone	(608) 555-1278		Jim Carson			<input type="checkbox"/>	<input type="checkbox"/>



Phone numbers and e-mail addresses are shared by all members of the household so only need to be entered once. [An exception is if the Member Link is used, see below.]


- To add a contact, click **New**. A blank, editable row is added to the grid. Enter the following:
  - **Type** - selection options are determined by [Admin > System Setting > Generic Lookups > Comm Types](#).
  - **Phone number or E-mail address** - phone numbers are automatically formatted. Simply type the numbers without dashes or parentheses.
    -  There is an option to automatically add a default area code under [Admin > System Settings > Options > Members](#).
  - **Member Link** - links a phone or e-mail to a specific person. The link is used by the [Gather E-mail Addresses and Textible Phone Numbers tool](#) to identify only phone numbers or addresses associated to specific **Member Types** or **Club Names**. Phone numbers and email addresses linked to specific persons can also be [shown](#) in the Clubber and Leader grids.
  - **Contact Person** - person associated to the contact record.
  - **Contact Relationship** - relationship of the contact person to the member/s; selection options are determined by [Admin > System Settings > Generic Lookups > Contact Relationships](#).
  - **Cell Carrier** - domain to append when sending SMS text messages from an e-mail client to a cell phone. Selection options are determined by [Admin > System Settings > Generic Lookups > Cell Phone Carriers](#).
  - **OK to Text** - indicates a cell phone IS textible AND permission has been given to text.
    -  To send text messages to a cell phone through e-mail, the carrier must be known. When requesting permission to send messages, also ask for the carrier.
  - **Primary** - one phone number and one e-mail address for the household to use in the **Clubber, Leader, and Household** Lists.
  - **Private** - indicates the record will not be printed on any formal report.
- To remove a contact from the list, select a row in the grid, then click the **Delete** button.
- To show/hide information about the dialog, click the **Info** button.
- When information is edited, the **Save** and **Save and Close** buttons will become enabled.
- Use **Close** to exit the dialog without saving changes.

## 4.2.2 Setting Registration to Current


 The Registration is current check box on the Member's Role record tracks who has registered. It can be [shown](#) in the main [Clubbers](#) or [Leaders](#) list under the Registration [header band](#) as well as on the Member Form's [Roles](#) tab. It can be selected directly on the [roles dialog](#). It is marked automatically when using Register and Post a Payment or the Registration Window. [Register and Post a Payment](#) allows a date selection and posting of an [unapplied payment](#). It sets the member's **status** to "Active" and creates a fee record for annual [dues](#) (if applicable). Access it from the right click pop-up menu in the [Clubbers](#) or [Leaders](#) grids.

The [Registration Window](#) provides a way to review member information, select members to register, assign books and uniforms, review fees, post payments and print registration reports from a household perspective. Access it from:

- [Clubbers](#), [Leaders](#), or [Check-in](#) module toolbar: **Begin the Registration Process** button
- [Households Module](#) toolbar: **Open Registration Window** button

 Each module also has a right click pop-up menu with this option.

### 4.2.2.1 The Register and Post a Payment Dialog

 The Register and Post a Payment dialog provides a convenient way to quickly mark one [or more members](#) as registered and enter a payment.



The payment portion is disabled when invoked for members from more than one household.

- **Set the Registration Date** - defaults to the Current Club Date, but can be changed.
- **Post an Unapplied Payment to the Household Ledger** (optional) - checking the box enables the payment options. Apply the payment to specific fees later using the [Household Ledger](#).




The payors in each household are displayed in the drop-down list for easy access.

- **OK** - sets **Registration is Current** and **Registered** date; sets **Permissions**-related fields (based on [Admin > System Settings > Options > Registration Form and Reports > Permission Defaults](#)); sets **Status** to "Active"; creates the [Annual Dues](#) fee (if applicable).
- **Cancel** - exits the registration process without saving it.



Use the [Registration Window](#) to also edit member data, assign books and uniforms, or post payments to fees.

### 4.2.2.2 The Registration Window Dialog






 The Registration Window provides a single point of access for the multiple tasks related to registration. Review and edit household and individual member information, select members to register, assign books and uniforms, review fees, post payments, and print registration related reports.

#### Step 1: Review Household and Member Info

Divided into three sections: Household, Contact Info, and the Individual Member section.



- **Household** - current household information is shown and can be edited directly.
- **Contact Info** - current contact information is shown. To add/edit/delete contacts, double click a row to open the [E-Contacts dialog](#).
- **Individual Members** - separate tabs for Clubbers and Leaders. Each tab has two read-only grids. To make changes, open the [Member Window](#) by double clicking on a row or using the Open Member button on the toolbar. Update information, then Save and Close the member record to return to the Registration Window.

<b>Icon</b>	<b>Action</b>	<b>Description</b>
	<b>Reg. Date</b>	The date defaults to the current club date but can be changed.
	<b>Open Member</b>	Opens the selected member in the <a href="#">Member Window</a> . (Pressing the <b>Enter</b> key with a row selected or double clicking the row also opens the member record.)
	<b>New Clubber (in this Household)</b>	Opens <a href="#">a new member form</a> pre-filled with the selected household's information.
	<b>Assign Handbook</b>	Opens the Assign Handbook dialog to <a href="#">assign a new handbook</a> to the selected member.
	<b>Assign Uniform</b>	Opens the Assign Uniform dialog to <a href="#">assign a new uniform</a> to the selected member.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.

- Register - checking the box sets Registration is Current and Registered date; sets the Permissions-related fields and Status to "Active"; and creates the [Annual Dues](#) fee (if applicable).



Review the **Current Book** and **Uniform**. Use the buttons above the grid to assign new items.






## **Step 2: Review Fees and Post Payments**

Shows the Household Ledger. See the [Household Ledger](#) section for additional information.


Member	Category	Item #	Description	Amount	Total Pd	Balance/Waived	Item Rcvd	Date Rcvd	Note
Jaqueline	Book	74190	HangGlider Handbook with Audio De	\$11.00	\$11.00	\$0.00		8/29/2018	
Jaqueline	Uniform	74413	Sparks Uniform Vest - Child medium l	\$11.00	\$11.00	\$0.00		8/29/2018	
Trevor	Book	34549	Mission: Evidence of Grace - NKJV	\$10.00	\$10.00	\$0.00		9/5/2018	
Trevor	Dues	Fee1819	Dues for the 2018-2019 Club Year	\$15.50	\$9.50	\$6.00		8/29/2018	
Trevor	Uniform	95931	T&T Uniform (Green) - Youth large 14	\$16.00	\$16.00	\$0.00		8/29/2018	



Review automatically created fees. Use the **New Fee** button to add additional items. Post payments, then print a [Household Account Statement](#) or a [Household Registration Form](#). The registration form includes an option to "**Display a summary of Fees and Payments in the Office Use area**" to use as a receipt of payment or a bill.

<u>Icon</u>	<u>Action</u>	<u>Description</u>
	<b>Save and Close</b>	Saves the changes and then closes the Registration window.
	<b>Print the Household Account Statement</b>	Opens the <a href="#">Household Account Statement</a> report dialog for the selected household.
	<b>Print the Household Registration Form</b>	Opens the <a href="#">Registration Form</a> report dialog for the selected household.
	<b>Refresh</b>	Refreshes the data in the grid. If there is a concern about viewing the latest data, simply click this button.
	<b>Stay on Top</b>	Toggles whether or not the window stays on top of the main window.

### 4.2.3 Assigning Handbooks

 Each active and visiting clubber should have at least one handbook assigned. (Visitors should be assigned an entrance booklet.) When initially adding clubbers to the database, assign completed handbooks for historical purposes and mark each as **Done**. See the Member Window's [Handbooks page](#) for more details on managing handbooks.

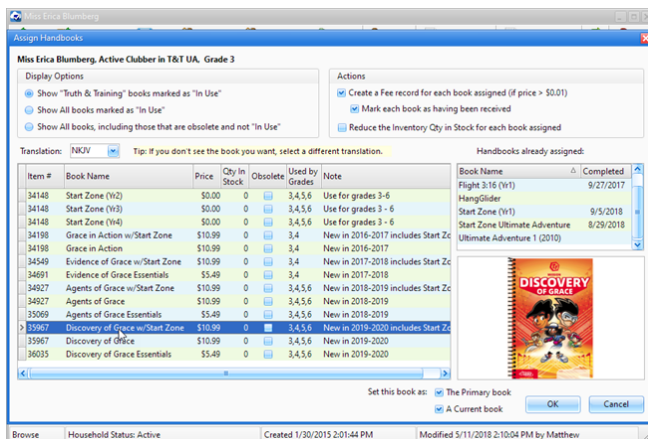
The Assign Handbooks dialog can be invoked as follows:

- Member Window > [Handbooks tab](#) toolbar: **Assign Handbook** button
- [Clubbers Module](#) grid: right click pop-up menu option to **Assign Handbook**



Use the [multi-select ability](#) on the clubber or check-in grid to assign books to up to 20 members at once.

- [Check-in Module](#): toolbar's **Assign Handbook** button or right click pop-up menu option
- [Registration Window](#), Step 1 grid toolbar: **Assign Handbook** button



**Display Options** - filter selections for the list shown in the grid. By default, only books used by the current club and marked as In Use in the [Inventory Item Window](#) are displayed.

**Translation** - further filters the list of handbooks in the grid based on the translation. This defaults to the individual's **Preferred Translation**.



Set the default translation under [Admin > System Settings > Options > Misc](#). The default is used when a new member is created. Change an individual's **Preferred Translation** on the [Misc](#) tab of the Member Window. The individual preference is used on the Assign Handbooks dialog.



While most handbooks are available in all of the translations, there are some exceptions. If the book isn't initially displayed, try selecting the **(All)** option.

**Actions** - determine additional steps taken when assigning this handbook.

- **Create a Fee record for each book assigned**
- **Mark each book as having been received** (if a fee is created)
- **Reduce the Inventory Qty in Stock for each book assigned** (do NOT check when entering historical data)



Change the default settings for the actions under [Admin > System Settings > Options > Misc.](#)

**Handbooks already assigned** - for reference only; the list of handbooks to select for assignment will not include books already assigned.

**Set this book as: The Primary book or A Current book** - choose the status of the book.

- **Primary** - the main book a clubber is working in. This will be shown in the Clubbers or Check-in grids. Some reports may only include the primary book.
- **Current** - any book a clubber is working in. All current books will be displayed in the handbooks section. Most reports can be run for all current books.



This can be helpful at the beginning of the year when assigning both an entrance book and a main handbook. The entrance book can start as the Primary and the main handbook as a current book. Once the entrance book is completed, the main handbook can become the primary book.

**OK** - adds the book to the member's [Handbook](#) list and completes any selected actions.

**Cancel** - exits the handbook assignment dialog without saving.

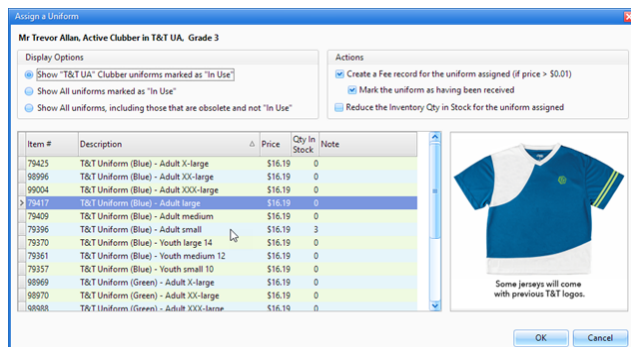
## 4.2.4 Assigning Uniforms



When a clubber completes an entrance booklet, a "reminder award" is triggered indicating the clubber is eligible for a handbook and a uniform (if applicable).

The Assign Uniform dialog can be invoked in the following ways:

- [Clubbers Module](#) grid: right click pop-up menu option to Assign Uniform
- [Check-in Module](#): toolbar's Assign Uniform button or right click pop-up menu option
- [Registration Window](#), Step 1 grid toolbar: Assign Uniform button
- [Roles dialog](#): Assign Uniform button (under Registration Info section)



**Display Options** - filter selections for the list shown in the grid. By default, only uniforms used by the current club and marked as In Use in the [Inventory Item Window](#) are displayed. With the first option, the list is further filtered based on the associated role type (leader or clubber).

**Actions** - determine additional steps taken when assigning this uniform.

- **Create a Fee record for each uniform assigned**
- **Mark each uniform as having been received** (if a fee is created)
- **Reduce the Inventory Qty in Stock for each uniform assigned** (do NOT use for historical data)



Set default options for the actions under [Admin > System settings > Options > Misc.](#)

**OK** - checks the **Has Uniform** box on the Member's [Role record](#) and fills in the description.

**Cancel** - exits the uniform assignment dialog without saving.

## 4.2.5 Assigning to a Team



All clubs organize clubbers by specific Club Name. To group clubbers into smaller groups, assign a Team Color and/or a Team Name.

**Color** - includes the common Awana® Clubs International team colors: Red, Yellow, Green and Blue. The following colors are also included: Purple, Silver, Aqua, Orange, Pink, Gold, Gray and Brown

**Name** - custom team names can be created under [Admin > System Setting > Generic Lookups](#). After creating team names, members can be assigned to a team.



Historical team names can't be deleted. To remove a team name from the current drop-down selections, uncheck the 'in use' box.

Assign Team Colors and/or Team Names as follows:

- [Clubbers](#), [Leaders](#), or [Check-in](#) module grid: from the right click pop-up menu, select **Set Role Team Color** or **Set Role Team Name**
- Member's [Role record](#): **Team Name** or **Team Color** field
  - If team colors are changed each week, use the [Check-in](#) module's right click pop-up menu to **Clear all Team Colors for this week** and **Reset all Team Colors for this week**.
  - Changing the Team Color or Team Name changes the member's [Role record](#) and updates the [Attendance](#) (session) record for the Current Club Date and all future dates. Past dates are not changed to maintain historical accuracy.
  - Quickly set Team Color or Team Name for multiple members from the [Clubbers](#), [Leaders](#) or [Check-in](#) module. [Work with the grid](#) and [select multiple rows](#), then use **Set Role Team Color** / **Name** from the right click pop-up menu to update all selected members' records.

## 4.2.6 Managing Member Photos

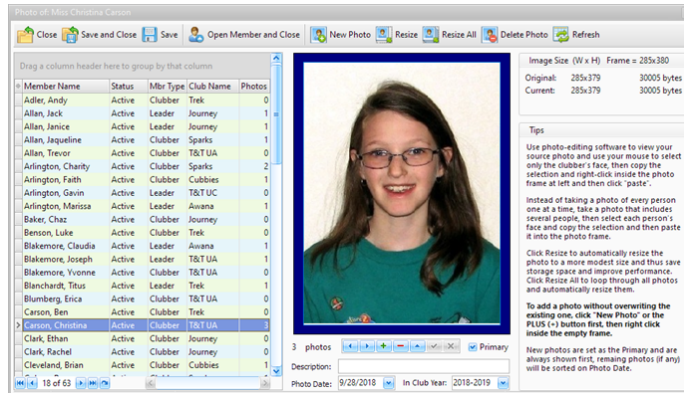



Photos are helpful to easily identify members. Several reports use the photos and they are displayed in the [Member Window](#). Easily review and load photos using the Photo Manager. Open it from the:










- Main Window's [Tools](#) menu: Manage Photos menu item
- [Member Window](#): Double click on the photo
- [Clubbers](#) or [Leaders](#) module toolbar: View/Edit the Photo(s) button



Each module also has a right click pop-up menu that includes **View/Edit the Photo(s)**.



- Select a member's name in the grid on the left. If a Photo exists, it is displayed in the frame.
  -  Manipulate this grid as explained in [Working with Grids](#).
- Multiple photos can be saved for each member. Normally there would be one for each year, but there is nothing to prevent more. Select the photo to display in the Member Window by marking it as **Primary**. If there are multiple photos for a member, click the left and right arrows beneath the photo to see all of the photos, sorted by the photo's date.
- To add a new photo: click **Plus (+)** beneath the photo. This puts an empty placeholder in the photo frame, then use one of the following:
  - Right click on the empty frame and select **Load...** from the pop-up menu. Locate and select the photo file for the selected clubber, then click **Open**. This works well if you have photos of each clubber (such as "head shots") in external files.
  - if you have a photo of a group of clubbers, open it in photo editing software. Select and **copy** the clubber's face, then right click and select **Paste** from the pop-up menu.

<u>Icon</u>	<u>Action</u>	<u>Description</u>
	<b>Close</b>	Closes the Photo Manager without saving current changes.
	<b>Save and Close</b>	Saves the changes and then closes the Photo Manager.
	<b>Save</b>	Saves the changes and leaves the Photo Manager open.
	<b>Open Member and Close</b>	Opens the <a href="#">Member Window</a> for the selected member and closes the Photo Manager.
	<b>New Photo</b>	Adds a new photo to the selected member. [Functions the same as the <b>Plus (+)</b> button beneath the photo.]
	<b>Resize</b>	Resizes the member's photo if it is larger than the frame. This saves storage space and improves performance.
	<b>Resize All</b>	Resizes all of the photos as needed.
	<b>Delete Photo</b>	Removes the current photo. [Functions the same as the <b>Minus (-)</b> button beneath the photo.]
	<b>Refresh Grid</b>	Refreshes the data in the grid. If there is a concern about viewing the latest data, simply click this button.

### 4.3 Basic Check-In

The Check-in Module includes functionality commonly used during club time. It has three sections: [Attendance](#), [Handbooks](#), and [Totals](#). It handles data entry for attendance, dues, and handbook sections; calculates points; triggers awards and provides valuable summary information. This section covers basic check-in information. For more details, see [The Check-in Module](#).

To begin, make sure the **Club Date** is set correctly on the [Main Window](#).

On the Attendance tab, select a member's row. Check the boxes for items related to Attendance, Other Items, Offering, and Misc. Points.



For quicker data entry, [select multiple members](#) and use the right click pop-up menu to **Set Attendance > Present/Not Present** for the group. ([Filter](#), [sort](#) and/or [group](#) records to help with selections.)



**Speed Check** (double check mark icon on the toolbar) marks additional items when attendance is marked. Set preferences under [Admin > System Settings > Options > Check-In](#).

Person Info		Session Info		Attend						Dues		Misc. Points		
Filing Name	Grade	Club Name	Team Color	Club	Uniform	Bible	Book	Bonus	Visitors	Dues Pd	Amt Pd	Game Pts	Other Pts	Spent Pts
Adler, Andy	8	Trek	Red	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Allan, Jacqueline	K	Sparks	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.50	0	0	0
Allan, Trevor	3	T&T Boys	Green	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.50	0	0	0
Arlington, Charity	1	Sparks	Blue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.50	0	0	0
Arlington, Faith	P2	Cubbies	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.50	0	0	0
Baker, Chaz	11	Journey	Red	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Blakemore, Yvonne	3	T&T Girls	Blue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Blumberg, Erica	3	T&T Girls	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.50	0	0	0
Carson, Ben	8	Trek	Green	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Carson, Christina	4	T&T Girls	Green	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Clark, Ethan	11	Journey	Blue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Clark, Rachel	9	Journey	Red	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Cleveland, Brian	P1	Cubbies	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Colson, Ryan	2	Sparks	Green	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.50	0	0	0
Delemeter, Deasana	4	T&T Girls	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Douglas, Janetta	12	Journey	Green	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.50	0	0	0
Easton, Lucas	5	T&T Boys	Green	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.50	0	0	0

**Attend - Club and Church** (Sunday School) attendance; **Excuse Club / Church Absence**

**Dues** - dues were **Paid**. **Amt Pd** defaults to the weekly [dues](#) amount, but can be changed.



This should only be money for DUES since a cash payment is created for the DUES FEE on the Household Ledger. For other payments, enter the amount in the [Household Ledger](#).

**Other Items** - a member wore a **uniform**, brought a **Bible** or **handbook**, or earned the **bonus** (such as participating in theme night). The **Note** field can be used for additional information; for example, details related to 'Other' points.



Two additional check boxes can be customized using the "Edit Custom Fields" button on the toolbar under [Admin > Club Setup > Club Names, Logos, Dues and Points](#).



**Visitors** - includes visitors added for the selected member using the [Add a Visitor](#) process.

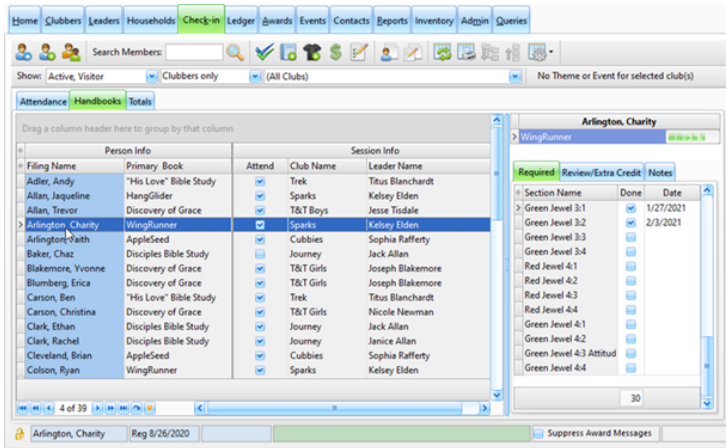
**Offering - Amount** given that is not for dues or other fees. Offerings are credited to the designated Offering Fund for the selected week and club. Set designations under [Admin > Club Setup > Club Calendars](#).

**Misc. Points** - points earned from **Games** or **Other** reasons. Positive or negative numbers can be used. **Spent** points reflect deductions for Club Store purchases.

**Status bar** - located below the grid. Check the box to "**Suppress Award Messages**".



For more information about suppression of award messages, see the section on [creating and assigning Awards](#).



On the **Handbooks** tab, click on a member's row to display the current handbooks in the [handbook sections grid](#). When the **Done** box is checked, the **Date** of completion defaults to the Current Cub Date but can be changed. Awards are triggered and a message is displayed.

For clubs that work on the same section (Cubbies or T&T), [group](#) records by Primary book and [filter](#) for Attend = True. [Select multiple members](#) and mark a section completed. Selected member's handbooks will be updated.

The **Totals** tab provides read-only summary information for the current club date:

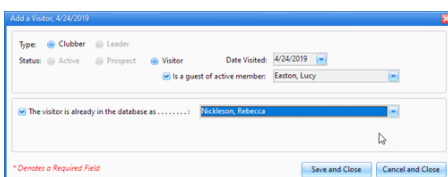
- **Sections - required sections** count, **required points**, **extra credit sections** count, and **extra credit points**
- **Subtotal** - summary of points: from **sections**, **general** categories (attendance, book, etc.), and **spent**
- **Total** - summary of **Section**, **Points** for the club date, and **Net Points**

## 4.4 Adding a Visitor

Visitors can be added to the database by clicking the Add a Visitor button on the [Check-in Module](#) toolbar or by selecting a status of Visitor on the [New Member dialog](#).

To give a clubber credit for bringing a guest (visitor) a second time, the **Add a Visitor** button must be used. Since the visitor is already in the database, the New Member dialog can't be used.

Using the **Add a Visitor** button opens the Add a Visitor dialog:



The first section is read-only with the following items set: **Type** - Clubber; **Status** - Visitor; **Date Visited** - the Current Club Date; **Is a guest of active member** - checked and the member selected when the dialog was invoked is listed.

To add a visitor not brought by a member, use the **New Member** button and select a **Status** of 'Visitor'.

The second section may be edited as follows:

**The visitor is already in the database as...** - defaults to checked.

- If this is true, select the clubber's name in the drop-down list. **Save and Close** the dialog.
- If the visitor is not already in the database, uncheck the box. The dialog expands to show the fields from the [New Member dialog](#). Complete the fields the same as when entering a new member.

## 4.5 Working with Dues

Details and settings for working with dues are found throughout the Windows App. This section provides an overview of how to set dues amounts, mark dues as paid, and record payments for annual dues fees.

### Assigning Dues Amounts

The Windows App can accommodate a variety of dues situations. Dues amounts can be different for each Club. Also, clubbers might pay dues once for the entire year or pay a little each week.

To assign the amount of money each clubber should pay for dues:

1. On the Main Window, click [Admin > Club Setup > Club Names, Logos, Dues and Points](#) and locate the "Dues" header band.

General		Session Info			Dues		Attend Club	Attend Church	Uniform	Bible	Bc
Club Name	Logo	Meeting Day	Starting Date	Ending Date	# of Weeks	Weekly Amount	Annual Amount				
Awana		Wednesday	8/31/2022	5/17/2023	38	\$0.00	\$0.00	0	0	0	0
Cubbies		Wednesday	8/31/2022	5/17/2023	38	\$0.50	\$16.00	10	10	5	5
Sparks		Wednesday	8/31/2022	5/17/2023	38	\$0.50	\$16.00	10	10	5	5
T&T Girls		Wednesday	8/31/2022	5/17/2023	38	\$0.50	\$16.00	10	10	5	5

2. Enter the **Weekly Dues Amount** and the **Annual Dues Amount** for each club.

- The weekly dues amount is used when the **Dues Pd** check box is marked on the [Check-in grid](#).
- The annual dues amount is used to create the dues fee when a clubber is [registered](#) (or a weekly dues payment is made).



Try to use values that make mathematical sense. For example, if weekly dues are \$1.00 and there are 32 weeks, then the annual dues should be \$32.00.

### Marking the Weekly Dues as Paid


The easiest way to mark weekly dues as paid is to use the [Check-in Module](#) as follows:

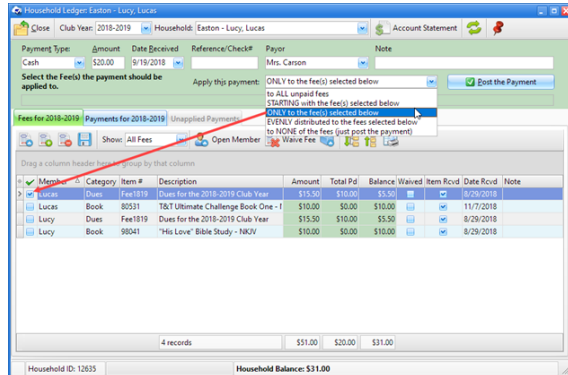
Club Name	Paid	Amt Pd	Unifo.
	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>	\$0.50	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>	\$0.50	<input checked="" type="checkbox"/>



1. Make sure the Current Club Date is set correctly.
2. Check the **Paid** box. A CASH payment is created for the clubber in the [Household Ledger](#).
3. The **Amt Pd** defaults to the amount set for weekly dues under [Admin > Club Setup > Club Names, Logos, Dues and Points](#) but can be changed by typing over the amount.

## Making a Payment on the Annual Dues Fee

 The method described above enters a CASH payment exclusively for dues for the selected clubber. If a payment is received to cover dues for more than one clubber, and/or it is not only for dues but also for books and uniforms, then the payment must be entered through the Household Ledger as follows:



1. Open the relevant family's [Household Ledger](#).
2. Select the **Payment Type** (cash, check, etc), then enter the **Amount**, **Date Received** (defaults to current club date), **Reference/Check#**, **Payor**, and **Note** (if desired).
3. From the **Apply this payment** drop-down list, select "**ONLY to the fee(s) selected below**".



If more money is received than the amount needed to cover the cost of dues, select "**STARTING with the fee(s) selected below**" so the remaining money goes towards other fees.

4. On the **Fees** tab, check the box next to the dues fee(s) to which the payment should be applied.
5. Click **Post the Payment** to apply the payment.



The **Post the Payment** button is enabled only after selecting one or more of the fee check boxes.

## 4.6 Working with Points

### Initial Setup

Setup point values for attendance related items as well as required and extra credit handbook sections under [Admin > Club Setup > Club Names, Logos, Dues and Points](#).

### Total Points

After attendance and other items are marked and completed handbook sections are recorded, the total points for each clubber can be reviewed or compared.

The [Achievement](#) report and the [Point List and Worksheet](#) provide information about member's points. The Check-in module's [Totals Grid](#) can also be used to analyze points. [Sorting](#), [filtering](#) and [grouping](#) the data in the grid can identify the clubber with the highest total points within a group or which Team had the highest points all at a glance without using a calculator! The example below shows grouping by Team Color. The highlighted row shows statistics for the group.

Person Info	Session Info	Attend	Dues	Sections	Subtotal	Total										
Filing Name	Club Name	Leader Name	Club	Paid	Armt Pd	Required Count	Required Points	Extra Count	Extra Points	Section Points	General Points	Spent Points	Section Count	Points Today	Net Points	
<b>Team Color : Blue (4 present, Total Points: 140, Avg: 35.0, Total Sections: 4, Avg: 1.0)</b>																
Blakemore, Yvonne	T&T Girls	Joseph Blakemo				\$0.00	1	10	0	0	10	25	0	1	35	1245
Farmer, Marjorie	T&T Girls	Marie Newman				\$0.00	1	10	0	0	10	25	0	1	35	635
Selden, Sawyer	T&T Boys	Jesse Tisdale				\$0.50	1	10	0	0	10	25	0	1	35	595
Uppenheim, Jared	T&T Boys	Alexander Smith				\$0.50	1	10	0	0	10	25	0	1	35	1245
			4	4	\$1.00		4	40	0	0			4		140	
<b>Team Color : Green (4 present, Total Points: 140, Avg: 35.0, Total Sections: 4, Avg: 1.0)</b>																
Allan, Trevor	T&T Boys	Jesse Tisdale				\$0.50	1	10	0	0	10	25	0	1	35	1080
Carson, Christina	T&T Girls	Nicole Newman				\$0.00	1	10	0	0	10	25	0	1	35	1010

## 4.7 Working with Awards

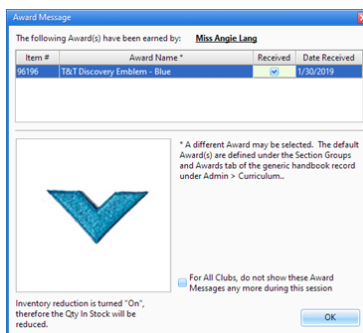
Most awards are generated automatically as handbook sections are marked. Awards for completion of a section, or a group of sections, are determined by records on the **Section Groups and Awards** tab of each [Generic Handbook](#) record. Awards for completion of a book are determined by records under [Admin > System Settings > Awards > Book Awards](#).

Award descriptions and photos come from corresponding [Inventory Items](#). For an item to be listed as an award option, **Use this item as a choice in any AWARD related drop-down list** must be marked on the [Club Usage](#) tab of the Inventory Item window. The database uses section and book awards recommended by Awana Clubs International. However, the database allows changes or adding items to the Inventory to use as awards.

This section covers the basic information related to awards. See the [Awards Module](#) for more details.

### Creating and Assigning Awards

When sections are marked as completed, either from the [Check-in Module](#) or the Member Window's [Handbooks](#) tab, awards are automatically created and assigned to a member. When a section or book is completed that triggers an award, the Award Message dialog opens.




**Award Name** - description from the Inventory record. A different award can be selected.


**Received** - indicates the award was given to the clubber; the default is determined by [Admin > System Settings > Options > Misc](#), but can be changed.



If the award is pulled and either given to the clubber or labeled for the clubber, mark it as received. If awards are pulled at a later time, don't mark it as received. For book awards that are handed out at the end of the year, leave them as not received. The [Award List](#) report can be run or the Awards grid [filtered](#) to show all awards that are not yet received to easily identify those that still need to be given out. These are suggestions. We recommend establishing a system that is meaningful and can be implemented consistently.

**For All Clubs, do not show these Award Messages any more during this session** - allows suppression of all award dialog messages. When Cubbies awards are triggered, there are additional options that apply to Cubbies only.

 Suppression of the award messages can also be done from the [Check-in Module](#). In the Status bar below the grid, check the box to "**Suppress Award Messages**".

 Suppression of the award messages does not affect the automatic triggering of the award and creation of the award record.






## Marking Awards as Received

If an award was not marked as received at the time it was generated, the easiest way to mark it afterward is from the [Awards Module](#) grid. Select the desired record(s), then click the **Rcvd** button (or use the right click pop-up menu item). **When marking awards Received, set Date Rcvd to date** field defaults to the current club date, but can be changed if needed before clicking the **Rcvd** button.

 Mark multiple award records as received all at once by [multi-selecting records](#).

## 4.8 Working with Grids

Grids are found throughout the Windows App. They are very powerful. Data entry can be conducted more efficiently and data can be quickly and easily analyzed by [sorting](#), [selecting which columns are visible](#), [filtering](#), [grouping](#), and [searching](#), as well as [printing](#), and [exporting](#) data. It is important to understand how to customize a grid to maximize the use of all of the grids in the Windows App. The following grid related buttons and menu items appear on many toolbars throughout the Windows App:

<b>Icon</b>	<b>Action</b>	<b>Description</b>
	<b>Refresh Grid</b>	Refreshes the data in the grid. If there is a concern about viewing the latest data, simply click this button.
	<b>Print Preview Grid</b>	Displays a preview screen of the data currently in the grid. This then allows <a href="#">printing the grid data</a> .
	<b>Expand All Rows</b>	Expands all of the rows when a grid is grouped or has multiple levels of information.
	<b>Collapse All Rows</b>	Collapses all of the rows when a grid is grouped or has multiple levels of information.
	<b>Grid Options</b>	Access to other grid related options by a drop-down <a href="#">menu</a> .

### Selecting multiple records

Many grids allow selecting multiple rows before performing an action. Once the rows are selected, choosing an action item from the right click pop-up menu or a button on the toolbar will apply to all selected rows. Use the following to select multiple records:

- **Contiguous rows**: click on a row, then use SHIFT+Click on another row. All of the rows in between will be selected.
- **Non-contiguous rows**: click on a row, then use CTRL+Click on any other row(s). The additional rows will be added to the selection.
- **All rows**: click on a row, then use CTRL+A. All of the rows in the grid will be selected.

## 4.8.1 Sorting

Clicking on a column header sorts the data in the grid based on that column. One click sorts in ascending order. Clicking again on the same column sorts it in descending order. A triangle appears in the column header to indicate it is sorted and the sort order (up for ascending and down for descending).

Name	Role Status	Club Name	Team Color	Total Points	Net Points	Book Name	% Completed	After
Filing Name	Active	Sparks	Blue	855	855	HangGlider	100%	20 of
Elliot, Caleb	Active	Sparks	Blue	830	830	WingRunner	100%	21 of
Arlington, Charity	Active	Sparks	Blue	900	900	SkyStorner	100%	22 of
Uppenheim, James	Active	Sparks	Green	770	770	WingRunner	100%	17 of
Colson, Ryan	Active	Sparks	Green	875	875	HangGlider	100%	21 of
Allan, Jacqueline	Active	Sparks	Red	750	750	WingRunner	100%	17 of
Fuller, Duncan	Active	Sparks	Red	660	660	SkyStorner	100%	16 of
Messner, Katie	Active	T&T UA	Blue	775	775	Evidence of Grace	100%	16 of
Blumberg, Erica	Active	T&T UA	Blue	845	845	Evidence of Grace	100%	17 of
Selden, Sawyer	Active	T&T UA	Blue	745	745	Evidence of Grace	100%	17 of

Data can be sorted on more than one column at a time. To create an additional sort, hold down the Shift key while clicking in a second column header. For example, to see how the Sparks Teams are progressing in their handbooks: on the [Clubbers grid](#), click the **Club Name** column header, then hold down the Shift key and click the **Team Color** column header and then the **% Completed** header. Each Sparks team is together ordered by the % completed in the handbook.



Sorting leaves all the rows of data in the grid. To limit the records in the grid, [apply a filter](#).



If you always sort the same way, [save the grid layout](#) with the sorting options.

## 4.8.2 Customizing Visible Columns

Choosing which columns are visible helps reduce or eliminate horizontal scrolling and removes visual clutter so only the desired data is shown.



[Save the layout](#) with the preferred columns so the Windows App uses that selection as the default. Temporarily hide columns for an ad-hoc report; then when finished, restore the last saved layout.

## Setting a Column's Visibility


Some grids have two header rows, such as the [Clubbers](#) and [Check-in](#) grids. The top one is a header **band**. It is a parent container for individual **columns** below it.

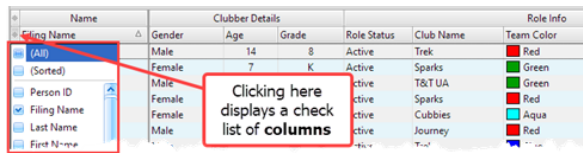
Name	Gender	Birthdate	Age	Grade	Club Name	Team Color	Role Info
Peter, Andy	Male	4/28/2005	14	8	Trek	Red	Titus Blanchard
Allan, Jacqueline	Female	11/19/2012	7	K	Sparks	Green	Kelsey Elden
Arki		3/15/2010	9	3	T&T UA	Green	Jesse Tisdale
Arki		6/21/2012	7	3	Wingrunner	Green	Jesse Tisdale
Baker, Luke		3/12/2014	5		Wingrunner	Green	Jesse Tisdale
Baker, Luke		10/21/2001	18		Wingrunner	Green	Jesse Tisdale
Benson, Luke	Male	9/30/2005	14		Wingrunner	Green	Jesse Tisdale
Blakemore, Viviane	Female	6/9/2010	9		Wingrunner	Green	Jesse Tisdale
Blumberg, Erica	Female	9/7/2010	9		Wingrunner	Green	Jesse Tisdale
Carson, Ben	Male	9/16/2005	14		Wingrunner	Green	Jesse Tisdale
Carson, Christina	Female	7/17/2009	10	4	T&T UA	Green	Nicole Neuman
Clark, Ethan	Male	12/30/2001	17	11	Journey	Blue	Jack Allan
Cleveland, Brian	Male	7/2/2004	15	9	Journey	Red	Janice Allan
Cleveland, Brian	Male	1/28/2015	4	P1	Cubbies	Aqua	Sootha Rafferty

There are two ways to update the visibility of a column:

1. Set the visibility of a **Column Header Band** associated to a column. Click the button to the far left of the header bands. In the list, check the box to show a header band. Clear the box to hide it. Example: in the Clubbers Module, the **Age** and **Grade** columns are associated with the **Member Details** header band. Hiding the **Member Details** header band also hides the associated columns.

Name	Gender	Age	Grade	Role Status	Club Name	Role Info
(All)	Male	14	8	Active	Trek	Red
(Sorted)	Female			Active	Sparks	Green
Name	Male			Active	T&T UA	Green
Registration	Female			Active	Sparks	Red
Clubber Details	Female			Active	Cubbies	Aqua
Role Info						

- Set the visibility of the **Column Header** (the label above each column.) Click the  button to the far left of the headers. In the list, check the box to show a column. Clear the box to hide it.



Filing Name	Gender	Age	Grade	Role Status	Club Name	Team Color
(All)	Male	14	8	Active	Trek	Red
(Sorted)	Female	7	K	Active	Sparks	Green
Person ID	Male			Active	T&T UA	Green
Filing Name	Female			Active	Sparks	Red
Last Name	Female			Active	Cubbies	Acqua
First Name	Male			Active	Journey	Red



Check the **(Sorted)** box for the list to show in alphabetical order to quickly find a column name.

## Moving Visible Bands and Columns

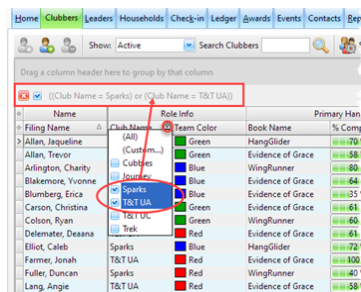
Besides controlling which columns are visible, columns can be rearranged. An entire band can be moved, or a column can be moved within the band. Drag a column header or header band to the desired location and drop it when the green arrows appear showing it is a valid drop location.

The width of header bands and columns can also be adjusted. Drag the right side of a header band or a column header to adjust the width. When adjusting the width of a column, the width of the header band might need to be adjusted first.

### 4.8.3 Applying a Filter

Filters selectively limit the rows that are displayed in the grid. Narrowing down the data helps in viewing pertinent information at a glance while disregarding more peripheral data. To apply a filter to a grid:

- Hover over a column header. A **filter menu** button appears on its right side. Click on the button. A check list of the unique values for the column is displayed.
- Select one or more check boxes to indicate which records to display. Example: selecting "Sparks" shows only clubbers in Sparks. Clicking "Sparks" and "T&T UA" shows clubbers in either club.
- When finished, click out of the check list drop-down. The filter is displayed above the grid and the rows of data showing in the grid are adjusted.
- To remove the filter, click the red **'X'** button next to the filter display above the grid.



Name	Club Name	Role Info	Primary Han
Filing Name	Club Name	Team Color	Book Name
Allan, Jaqueline	(Custom...)	Green	HangGlider
Allan, Trevor	Cubbies	Green	Evidence of Grace
Arlington, Charity	Journeys	Blue	WingRunner
Blakemore, Yvonne	Sparks	Blue	Evidence of Grace
Blumberg, Erica	T&T UA	Blue	Evidence of Grace
Carson, Christina	T&T UA	Green	Evidence of Grace
Colson, Ryan	T&T UA	Green	WingRunner
Delemater, Deana	Trek	Red	Evidence of Grace
Elliot, Caleb	Sparks	Blue	HangGlider
Farmer, Jonah	T&T UA	Red	Evidence of Grace
Fuller, Duncan	Sparks	Red	WingRunner
Lang, Angie	T&T UA	Red	Evidence of Grace

- Additional filters can be added by selecting another column value. For example, to see a list of only the Female clubbers in Sparks and T&T UA, click on the filter button in the **Gender** column header, then use the drop-down check list to select "Female".
- To temporarily disable the filter, click the check box toggle next to the filter display above the grid.
- To [customize the filter](#) beyond the header drop-down menu options, click the **Customize...** button found on the right side of the area above the grid (with a filter already in use).



Some filters are common within a Module so are included as Show drop-down menus above the grid. For example, in the [Check-in Module](#), select to show Clubbers, Leaders, or Clubbers & Leaders. These Show menus are for convenience but work the same as the column header filters.

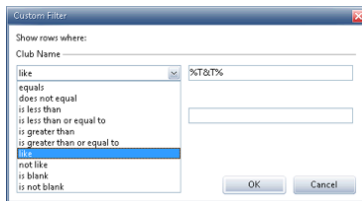
## 4.8.4 Customizing a Filter

Any column header with **(Custom...)** in a drop-down menu can be customized beyond the options in the check list. This provides great power in filtering the grid to show only select rows of data. When initially creating the filter, one or two simple conditions can be specified.

To add more conditions, or to make changes to an existing filter, use the more advanced Filter Builder tool. Filters can also be saved to use again. To open the Filter Builder tool, click the **Grid** button in the toolbar and select **Custom Filter Dialog**. (Refer to **Changing a Customized Filter** below.)

### Creating a Customized Filter

Select the column to filter by and click the filter button to view the drop-down menu. Select **(Custom...)** to open a Custom Filter window.



1. Select the operator for the condition from the top left drop-down list. In the field to the right of the operator, if applicable, type the value for the condition.
2. To set more than one condition for the filter, select the **AND** or **OR** radio button. Then select the operator and value for the second condition.



Using AND for the conditions will show only rows of data that meet both conditions. Using OR for the conditions will show all rows that meet either the first condition or the second condition.

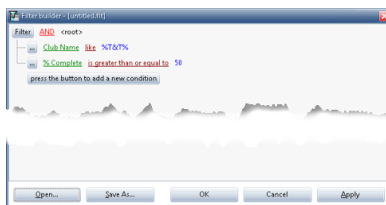
3. Click **OK**. The filter conditions are shown above the grid and the data shown in the grid is adjusted.

Name	Club Name	Team Color	Book Name	% Complete	Award Set	trans	Attended	First Attend	Last Attend	Joined	Y/N	Description
Jalan, Trevor	T&T UA	Green	Evidence of Grace	58%	UCI Emblem NKIV	20 of 32	8/31/2016	4/24/2019				T&T Uniform
Blakemore, Yvonne	T&T UA	Blue	Evidence of Grace	64%	Emblems NKIV	21 of 32	8/31/2016	2/6/2019				T&T Uniform
Carson, Christina	T&T UA	Green	Evidence of Grace	61%	Emblems NKIV	19 of 32	8/31/2016	2/6/2019				T&T Uniform
Delemater, Deana	T&T UA	Red	Evidence of Grace	69%	Emblems NKIV	17 of 32	1/24/2018	1/30/2019				T&T Uniform

### Changing a Customized Filter



To make further changes to a customized filter, click **Customize...** in the right hand corner above the grid or select **Custom Filter Dialog** from [the Grid menu](#) to open the Filter Builder window.





- To remove a filter condition, click the '...' button and select **Remove Row** from the drop-down menu.
- To add a new filter condition, either click the '...' button and select **Add Condition** from the drop-down menu, or click **press the button to add a new condition**.
  - The new row will contain a default condition that, in most cases, should be modified
  - Click on each piece of the condition to modify it.

- Either click **OK** to apply the filter and close the window, or click **Apply** to check the results.
- To save the customized filter, click **Save As...** and select where to save the filter.
- To open/reuse a saved filter, after opening the Filter Builder window, click **Open...** and select a saved filter.

## 4.8.5 Applying a Grouping

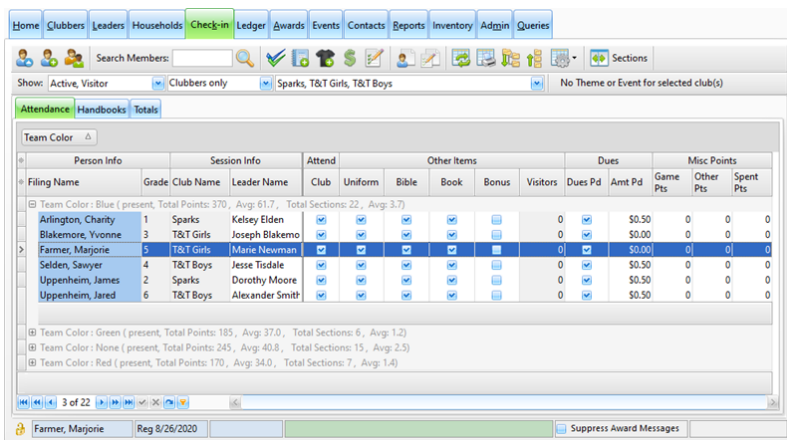
Another powerful tool for organizing and analyzing data within grids is grouping. Grouping records can be done using a single column or multiple columns. It is especially useful for getting record counts for individual groups. For example: How many Sparks are in your club? How many of each gender are in each grade? Using the grouping operation provides these answers in seconds!

 To save a small amount of screen space when not using the grouping feature, go to the [Grid Menu](#) and uncheck the option to **Show Group By Box**.



 If grouping is possible for a grid, the area above the grid will say "Drag a column header here to group by that column". If that is not showing, check the **Grid** drop-down menu to see if it has been hidden.


Drag a column header to use for grouping (the [Check-in > Attendance](#) grid's Team Color, for example) and drop it in the area above the grid. The data in the grid will then be grouped according to the column header.

 If a desired column is not currently displayed in the grid, learn how to [make it visible](#).





Person Info		Session Info		Attend		Other Items				Dues		Misc Points		
Filing Name	Grade	Club Name	Leader Name	Club	Uniform	Bible	Book	Bonus	Visitors	Dues Pd	Armt Pd	Game Pts	Other Pts	Spent Pts
Team Color: Blue ( present, Total Points: 370, Avg: 61.7, Total Sections: 22, Avg: 3.7)														
Arlington, Charity	3	Sparks	Kelsey Elden	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.50	0	0	0
Blakemore, Yvonne	3	T&T Girls	Joseph Blakemo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Farmer, Marjorie	5	T&T Girls	Marie Newman	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Selden, Sawyer	4	T&T Boys	Jesse Tisdale	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.50	0	0	0
Uppenheim, James	2	Sparks	Dorothy Moore	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.50	0	0	0
Uppenheim, Jared	6	T&T Boys	Alexander Smith	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.50	0	0	0
Team Color: Green ( present, Total Points: 185, Avg: 37.0, Total Sections: 6, Avg: 1.2)														
Team Color: None ( present, Total Points: 245, Avg: 40.8, Total Sections: 15, Avg: 2.5)														
Team Color: Red ( present, Total Points: 170, Avg: 34.0, Total Sections: 7, Avg: 1.4)														

- To view the individual members within the groups, click the  toggle to the left of the group to **Expand** the records. Click the  toggle to **Collapse** the details of the group.
- To add a grouping within a grouping, drag another column header up to the grouping area. (For example, putting the **Gender** column under the **Team Color** column shows how many of each gender are in each color group.)
- To disable a grouping, drag the column header anywhere outside the grouping area. When a large black **X** is shown, then drop it. The column will reappear at its original location within the grid.

 Dropping the column header on top of other column headers in the grid will insert the column at that location (which might or might not be desired!)

## 4.8.6 Searching for Records

 There are two methods that can be used to search records within a grid: the Search tool (available within certain Modules) and the Incremental Search (available within certain columns of certain grids).

 To search the entire database, use the Search tool on the [Main Window's Toolbar](#).

## Using a Module's Search Tool

There are five modules with **Search** tools: [Clubbers](#), [Leaders](#), [Households](#), [Check-in](#) and [Inventory](#). The **Search** tool allows easy filtering of the grid to show only rows that match the Search field. In the Clubbers, Leaders, and Check-in Modules, the filter applies to the **First**, **Last**, or **Preferred** name. In the Households Module, it applies to the Household Filing Name. In the Inventory Module's Item grid, it applies to the **Item #** or **Description**. To use the tool:

1. Type the text to search for in the **Search** field.



When searching for a clubber, type the surname (last), then the first name (i.e. Uppenheim, Kim). The search will not work if the first name then the surname is entered. (i.e. Kim Uppenheim).

2. Press **Enter** or click the **Perform the Search** button. All matching rows are displayed in the grid.

3. To restore the grid, clear the text from the **Search** box and press **Enter** or click the **Perform the Search** button.

## Doing an Incremental Search

Many grids allow quickly jumping to a record by typing while in the grid. The [Clubbers](#), [Leaders](#), [Households](#), [Ledger](#), and [Awards](#) grids allow incremental searching by **Last Name** (but not **First Name**). The [Check-in](#) grid allows incremental searching by **Last Name** or **First Name** based on which column has focus. The [Inventory](#) grid allows incremental searching by **Item #**. To do an incremental search:

1. Click anywhere in a grid that has incremental searching capabilities.



On the Check-in List grid, click in the **First Name** column or the **Last Name** column.

2. Start typing either a name or item number, depending on the grid. The grid will scroll to the first row that matches and select the row.

3. To start a different incremental search, press the **Esc** key before typing again.

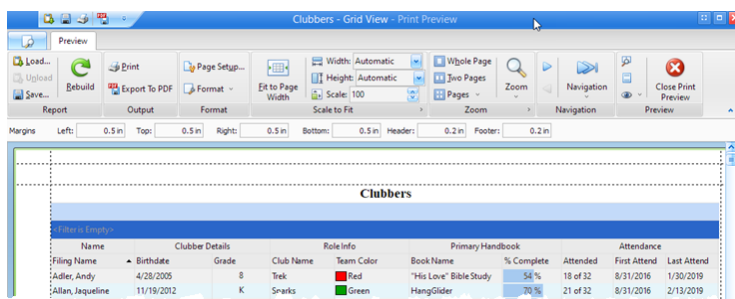
## 4.8.7 Printing Grids



The [Reports Module](#) includes many useful reports. However, something different than what the formal reports provide might be needed. In this case, the powerful features of the major grids provide access to additional data analysis and output. To print data from a grid as an ad-hoc report:

1. [Sort](#), [customize visible columns](#), and apply [filters](#) or [groupings](#) to the grid. Only records visible in expanded nodes will be printed.

2. Click the **Print Preview** button in the toolbar to open the Print Preview dialog.



3. Use the **Format** button to add a **Report Title**, **Footnotes**, **Page Numbering**, etc. The toolbar also has other typical tools for managing the printer and page settings before printing.

4. After making the desired selections, click the **Print** button or use the **Export to PDF** button to create an external file to attach to an e-mail.



## 4.8.8 Exporting Data from Grids

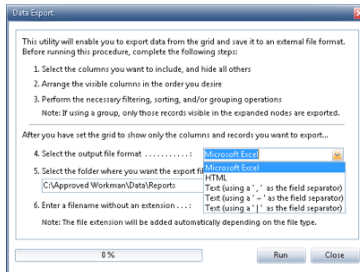


Save a grid's data to an external file format by exporting the data. The following formats are supported: Microsoft Excel, HTML, and Text files with '~', '|', or ',' used as field separators. Exported data could be used for a mail-merge, importing data into another application or generating a specific report. To export a grid:

1. [Sort](#), [customize visible columns](#), and apply [filters](#) or [groupings](#) to the grid, then select **Export...** from the [Grid menu](#) to open the Data Export dialog:



If groupings are applied, only those records visible in the expanded nodes will be exported.



2. Select the **output file format** from the drop-down menu.
3. Select the **folder** where the exported file will be saved.
4. Either accept the default **filename** or enter a preferred filename to use when saving the file.



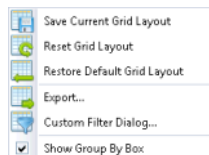
Do not add an extension to the filename since the Windows App will do that.

5. Click **Run**. The grid's data is exported to a file with the specified name in the specified folder.

## 4.8.9 The Grid Menu



This menu provides additional items related to the grid.



## Working with Grid Layouts

Once a preferred grid setup is created, save the layout so those customizations do not have to be repeated each time that grid is used.



Grid layouts are saved per [user](#). Each person should have a unique user account.

From the **Grid** menu, use the following options to maintain the grid layouts:

- **Save Current Grid Layout** - for the grid layout view that is typically used. When the Windows App starts, the grid defaults to this layout.
- **Reset Grid Layout** - return to the normal/saved layout after the grid is temporarily adjusted for a specific task.
- **Restore Default Grid Layout** - return to the original layout set for the grid by the Windows App.


## Other Menu Items

- **Custom Filter Dialog...** opens the Filter Builder dialog to [create, modify, or open customized filters](#).
- **Export...** starts the process of [exporting a grid's data](#) to an external file.

## Grid Display

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These options affect how the grid is displayed:

- **Show Group By Box** - show/hide the grouping area displayed above the grid.
  - **Use Alternate Grouping Style** - alternate between two styles available for displaying grids with groupings.
  - **Use Alternate Color Scheme for Rows** - use a different color for alternating rows in the grid
-  Use **Alternate Grouping Style** and **Alternate Color Scheme** options are only available for the "Native" [Style](#).

# **Chapter**

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**5**

## 5 Beyond the Basics

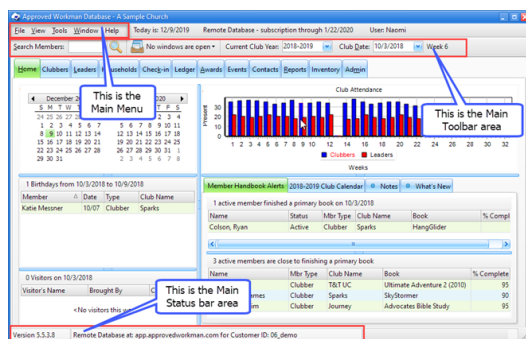
Besides tracking the basics like member attendance, handbooks, sections, and points, the Windows App can track a variety of other items. This section assumes understanding of the topics covered under [learning the basics](#) to explore additional features of the Windows App.

1. Record [service history](#) and [training](#) events for leaders. The Windows App can [evaluate attendance requirements](#) to determine if a leader has attended enough weeks to count towards a year of service.
2. Track Inventory by [entering current inventory counts](#). The Quantity in Stock values are automatically decreased as awards are earned and books are assigned and increased as items on an Order are marked as Received.
3. Manage [orders](#) placed with Awana Clubs International including which items have been received or back-ordered. Although the Windows App does not make a connection to place the order, the completed order form makes phoning, mailing or entering the order on the website very simple.
4. [Post payments](#) for dues, uniforms, books, etc. to the applicable fees and track which items have been received. By sorting and filtering the [Ledger Module](#) grids, totals for [received payments](#), amounts still outstanding, or the total amount of waived fees can be determined.
5. Periodically print [Household Account Statements](#) to remind members of an outstanding balance. The statement is customizable, so information can be give about contacting the church or possible scholarships. Statements can be printed directly from any family's [Household Ledger](#).
6. Use the Offering field of the [Check-in](#) grid to keep track of offering money. The names of the accounts to which offerings can be credited can be customized.
7. Enter a record in the [Contacts Module](#) when a leader sends a postcard, makes a phone call, or otherwise contacts a clubber.
8. Use the [Events Module](#) to track members who attended events and if an award was earned. This is handy for Bible Quizzing and Awana Games participation.

There are often multiple ways to perform the same action. For example, to open a record: double click a row in a grid; select a row and use the **Open** button on a toolbar, the right click pop-up menu option, or press **Enter** or **Ctrl +O**. It is not important to know ALL of the ways to perform an action, just the one that works for you!

### 5.1 The Main Window

The functionality of the Windows App is organized into modules which are accessible by clicking the Main Window's tabs (Clubbers, Leaders, Households, etc.). This makes it easy to navigate from one area of functionality to another. The Main Window also contains the Main Menu bar, Toolbar, and Status bar which can be accessed from any module.



#### The Menu Bar

- Provides access to common menu functions such as [File](#), [View](#), [Tools](#), [Window](#), and [Help](#).
- Displays the **Current Date**, **Subscription** information and the **Current User**.

## The Toolbar




- Provides quick access to any Member record from the [Search Members](#) field.
- Displays a count of Open Windows. Switch to any open window using the drop-down list.
- Displays **Current Club Year** and **Current Club Date** with drop-down lists to change selections.
- Displays the **Current Week Number** (and "last week of quarter", if applicable).

## The Status Bar

- Displays **Version** information, the **Customer ID**, and a progress bar when needed.












### 5.1.1 The File Menu

The following items are included in the Main Window's **File** menu:


<u>Icon</u>	<u>Action</u>	<u>Description</u>
	<b>Close All</b>	Closes all open windows.
	<b>Switch Users</b>	Logs out the current user and provides a log-in screen for another user to log in without exiting the database.
	<b>Exit</b> (Ctrl+Q)	Shuts down the database.

### 5.1.2 The Tools Menu

The following items are included in the Main Window's Tools menu.

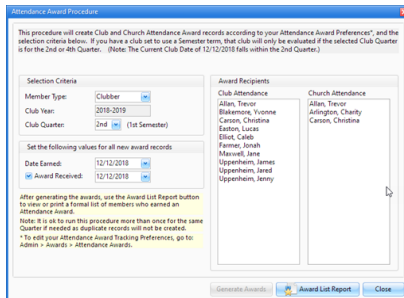
<u>Icon</u>	<u>Action</u>	<u>Description</u>
	<a href="#">Attendance Awards</a>	Generates church and club attendance awards.
	<a href="#">Club Store</a>	Provides a tool to manage Club Store tasks such as looking up accumulated points and entering points spent.
	<a href="#">Gather E-mail Addresses...</a>	Collects e-mail addresses or textible phone numbers based on selection criteria.
	<a href="#">Inventory Quick Reference</a>	Provides a resource to quickly search for an inventory item that is "In Use".
	<a href="#">Manage Photos</a>	Provides a way to work with the photos for all members.
	<b>Show Users..</b>	Displays a list of all users that are currently logged in to the database.
	<a href="#">Data Import</a>	Imports data from an external file for either an initial data load or for updating records from online registration.
	<a href="#">SQL Workbench</a>	Provides an interface for querying the database using SQL statements.
	<b>New Year Setup</b>	Not available. A message is provided with instructions to setup a new year using the Web App.
	<b>Change Password</b>	Allows the current password to be changed to a new one.
	<b>Show OS Version</b>	Displays the version number of the computer's Operating System.

### 5.1.2.1 Attendance Awards

 On the last week of each quarter or semester, a reminder to generate Club and SS/Church Attendance Awards is triggered. Use the Attendance Awards procedure to easily do this, as follows:

 Set criteria under [Admin > System Settings > Awards > Attendance Awards](#).

1. Select **Tools > Attendance Awards** from the Main Window's Menu bar.



The screenshot shows the 'Attendance Award Procedure' dialog box. It contains the following information:

- Selection Criteria:** Member Type: Clubber; Club Year: 2018-2019; Club Quarter: 2nd (1st Semester).
- Award Recipients:**
  - Club Attendance: Allan, Trevor; Blakemore, Yvonne; Carson, Christina; Easton, Lucas; Elliot, Caleb; Farmer, Joseph; Maxwell, Jane; Uppenheim, James; Uppenheim, Jared; Uppenheim, Jerry.
  - Church Attendance: Allan, Trevor; Arlington, Charly; Carson, Christina.
- Set the following values for all new award records:** Date Earned: 12/12/2018; Award Received:  12/12/2018.
- Buttons:** Generate Awards, Award List Report, Close.

2. Set the **Selection Criteria** - select values for: **Member Type**, and **Club Quarter**. The **Club Year** shows the **Current Club Year** from the Main Toolbar and is read-only.

3. Set the following values for all new records:

- **Date Earned** - defaults to the current week, but can be changed.
- **Award Received** - indicates if awards should be marked as Received by members when the award is created. Checking the box enables the date **Received** field.



If not marking awards as received, easily mark them as received later from the [Awards module](#).

4. Click **Generate Awards**. Awards are created for members that meet the criteria. Names are shown under **Award Recipients**. Message dialogs indicate the number of recipients and number of records created.



The procedure will not generate duplicate awards even if it is run multiple times.



**Excused absences:** To review a member's attendance, open the Member record and go to the [Attendance](#) tab. To excuse an absence, make Attend Excused and SS Attend Excused [columns visible](#) (they are normally hidden). Check the box to excuse attendance, then rerun the procedure. Attendance can also be excused from the [Check-in grid](#).

5. Click **Award List Report** if a formal report is desired and **Close** when finished.

### 5.1.2.2 Club Store

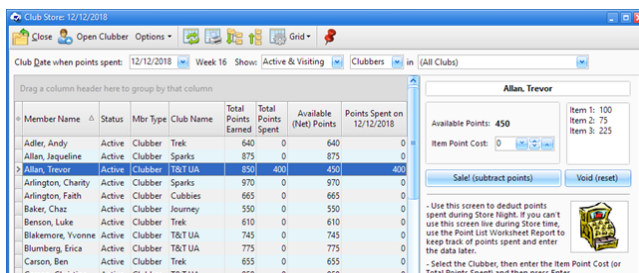


Use this tool to see how many points a clubber has to spend and to deduct spent points, as follows:



Use the [Point List and Worksheet](#) as a reference and to track points spent for later data entry.

1. Select **Tools > Club Store** from the Main Window's Menu bar.



The screenshot shows the 'Club Store' application window for 12/12/2018. It displays a table of members with columns for Member Name, Status, Mbr Type, Club Name, Total Points Earned, Total Points Spent, Available (Net) Points, and Points Spent on 12/12/2018. A pop-up window for 'Allan, Trevor' shows Available Points: 450 and Item Point Cost: 100.


Member Name	Status	Mbr Type	Club Name	Total Points Earned	Total Points Spent	Available (Net) Points	Points Spent on 12/12/2018
Adler, Andy	Active	Clubber	Trek	640	0	640	0
Allan, Jacqueline	Active	Clubber	Sparks	875	0	875	0
Allan, Trevor	Active	Clubber	T&T UA	550	400	450	400
Arlington, Charly	Active	Clubber	Sparks	970	0	970	0
Arlington, Faith	Active	Clubber	Cubbies	665	0	665	0
Baker, Chaz	Active	Clubber	Journey	550	0	550	0
Benson, Luke	Active	Clubber	Trek	610	0	610	0
Blakemore, Yvonne	Active	Clubber	T&T UA	745	0	745	0
Blumberg, Erica	Active	Clubber	T&T UA	775	0	775	0
Carson, Ben	Active	Clubber	Trek	655	0	655	0
Carson, Christina	Active	Clubber	T&T UA	950	0	950	0

2. Set the **Club Date when points spent**. It defaults to the current club date, but can be changed.
3. Use the **Show:** drop-down lists to filter by **Status**, **Role Type** and/or **Club**. The grid can also be manipulated as explained in [working with grids](#).
4. Select a clubber in the grid on the left. The clubber's information will be shown on the right.
5. Enter the **Item Point Cost** (or total points spent) for the items purchased.
6. Press **Enter** or click **Sale**. The clubber's **Net Points** are decreased and **Points Spent** are increased. Click **Void (reset)** to revert to the original **Net Points** with zero **Points Spent**.

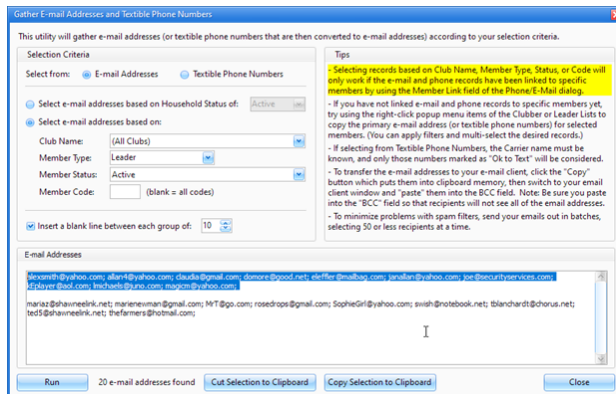
The following common functions can be accessed using buttons on the window's toolbar:

- **Open Clubber** - opens the [Member Window](#) for the selected clubber to get more details
- **Options** - choose to **Set focus to Item Point Cost after selecting clubber**, and/or **Set focus back to the grid after pressing Enter**
- **Stay On Top** - a toggle button that is either selected or not. When it is selected, the Club Store window remains in front of the Main Window. When not selected, use the **Window** menu or the Window Manager list in the Main Window's toolbar to return the hidden window to the front.

### 5.1.2.3 Gather E-mail Addresses and Textible Phone Numbers

 Use this tool to gather e-mail addresses or textible phone numbers (that are converted to e-mail addresses). The carrier domain name is appended to each textible phone number. The results can be copied to clipboard memory, then pasted into the BCC field of an e-mail client. To use the tool:

1. Select **Tools > Gather E-Mail Addresses.....** from the Main Window's Menu bar.



2. Set the **Selection Criteria:**
  - **E-mail Addresses** or **Textible Phone Numbers**
    - If selecting from Textible Phone Numbers, the Carrier name must be known and only numbers marked as "Ok to Text" are considered. See the [E-Contacts dialog](#) for more details.
  - **Household Status** or **Club Name**, **Member Type**, **Member Status**, and/or **Member Code**
    - For selection based on Club Name, etc, a **Member Link** must exist on the [Phone/E-mail dialog](#).
  - Choose to **Insert a blank line** and set the number to include in each group.
3. Click **Run**. The results are displayed in the **E-mail Addresses/Textible Phone Numbers** area.
4. Choose **Copy All to Clipboard** or select a group and choose **Cut Selection to Clipboard** or **Copy Selection to Clipboard**. Switch to an e-mail client and **Paste**.



Do NOT paste all the addresses into the **To:** field; instead, paste them into the **BCC:** field.



The preferred type of e-mail separator can be set for each user under [Admin > Users](#).

5. Click **Close** when finished.

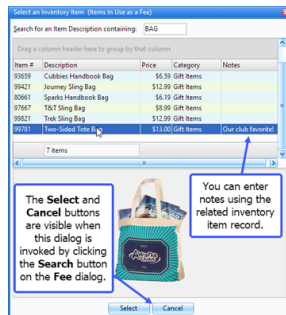


E-mail addresses or textible phone numbers can also be collected from the [Clubbers](#) or [Leaders](#) grids. [Filter](#) and [multi-select rows](#), then use the right click pop-up menu and choose one of the options to copy phone numbers or email addresses.

### 5.1.2.4 Inventory Quick Reference



Use this tool to quickly find an Inventory Item. Open the dialog by selecting Tools > Inventory Quick Reference on the Main Window's Menu bar.



1. In the Search box, type a few characters from the **Description**, such as "unif" for uniforms, or "bag" for handbook bags. Matching records are listed. Add a **Note** (like "club favorite!") to the [Inventory Item](#) records to aid selection.
2. Once the particular item is located, use the right click pop-up menu to **Copy the Item Number**, **Copy the Description** or **Open the Inventory Item**



The Inventory Quick Reference dialog can be re-sized so it is narrow. Also, it is not modal, so it can be moved over to the side and left open while continuing to work on other screens.



When opened from the Fee dialog's **Search** button, **Select** and **Cancel** buttons are also displayed.

### 5.1.2.5 Data Import



Use this utility to import data from an external file for either of the following two scenarios:

1. **Initial Data Load:** bring data into a new (empty) database
2. **Online Registration:** add or update existing records with a data file from an online registration website. (For existing users of the database.)



Run the [New Year Setup](#) before importing registration data.



For first time users of the Data Import, contact support and request a backup, then wait for confirmation before continuing.

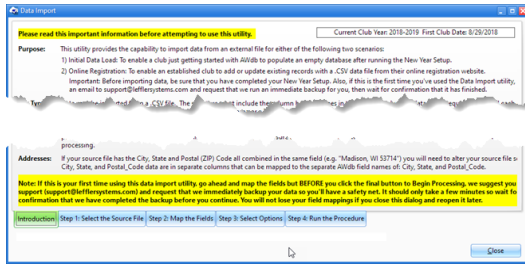
#### Introduction

The Introduction page provides important information about **File Types**, **Limitations** and **Club Names**, as well as tips **For Best Results** and format information for **Addresses**.



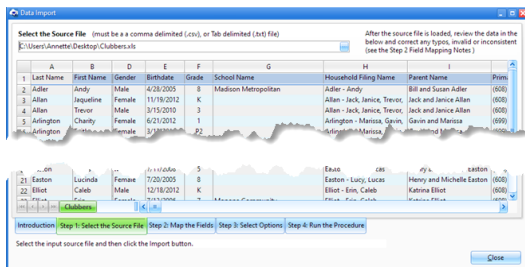
Please read this page carefully! Not reading the instructions could result in problems with your data.





### Step 1 - Select the Source File

Identify the source file to be imported. After the file is loaded, review the data in the grid and correct any typos and invalid or inconsistent values. See the **Field Mapping Notes** in Step 2 for specific requirements of each field. Return to Step 1 to edit data as needed.

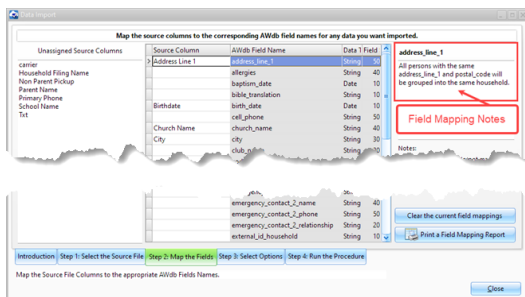


### Step 2 - Map the Fields

Map the source columns to the corresponding database field names. On the left is a list of the **Unassigned Source Columns**. In the grid, identify the **Source Column** for a database **Field Name**. Information about **Data Type** and **Field Size** are given as well as specific information about mapping the source data to that field.

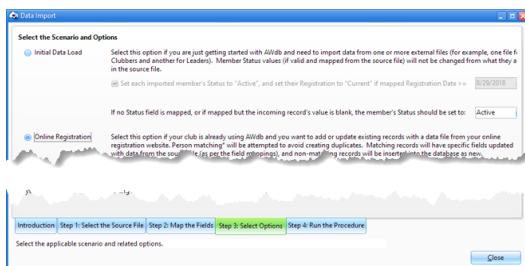


Please read the mapping notes carefully to assure data is formatted correctly and you understand how each field is used.



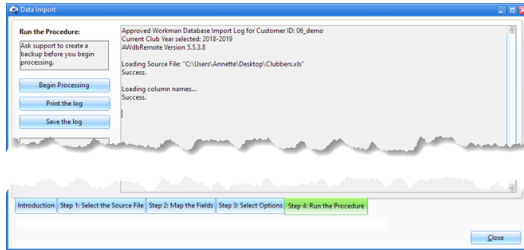
### Step 3 - Select Options

Choose from an **Initial Data Load** or **Online Registration** scenario. Detailed descriptions are included as well as **Important Notes**.



## Step 4 - Run the Procedure

Once the setup is complete, run the Data Import Procedure.



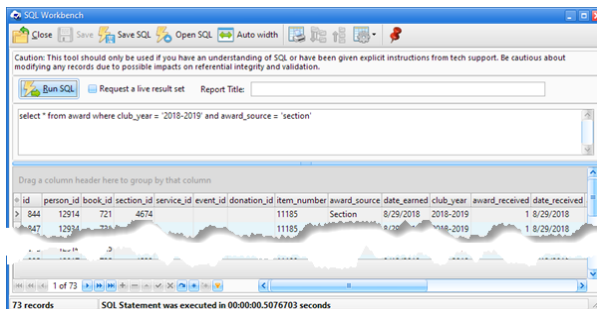
- Read reminders and heed any warnings, then click **Begin Processing**. A log is generated.
- When complete, review the log for items that need attention. **Print** or **Save the log** for reference.
- Click **Close** when finished.

### 5.1.2.6 SQL Workbench

Even though the Windows App provides many ways to view and analyze data, there might be times when data is needed in a different way. The SQL Workbench allows querying the database using SQL statements. To see examples of this feature, visit the [Approved Workman Forum](#).



Only use this tool with knowledge of SQL or with explicit instructions from Customer Support.



Icon	Action	Description
	<b>Close</b>	Closes the SQL Workbench without saving current changes.
	<b>Save</b>	Saves any changes made in the "live result set". The <b>Save</b> button is only enabled if the <b>Request a live result set</b> is selected.
	<b>Save SQL</b>	Saves the SQL statement that is currently displayed to a file to easily open it and run it again at a later time.
	<b>Open SQL</b>	Opens a SQL statement that was previously saved to a file.
	<b>Auto Width</b>	Automatically resizes the grid's columns to best fit the data that is displayed.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.
	<b>Stay On Top</b>	Toggles whether or not the window stays on top of the main window.
	<b>Run SQL</b>	Runs the current SQL statement and displays the results in the grid.

- To edit the data, check the **Request a live result set** box then click **Run SQL** again. This allows changes to be made in the grid and enables the Save button to keep the changes.



Again, be cautious about modifying any records due to possible impacts on referential integrity and validation.

- If the grid's data is going to be printed, specify a **Report Title** to be used.

### 5.1.2.7 New Year Setup








The New Year Setup procedure (NYS) prepares the database for a new club year. There is no formal process or work to do to close out the prior year.

The New Year Setup procedure must be run in the Web App:

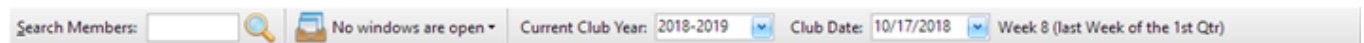
- Open a web browser (we recommend Chrome) and go to: [app.approvedworkman.com](http://app.approvedworkman.com).
- After logging in, click on the Club Year at the top to access the drop-down menu and select "Setup New Year".
- Additional details can be found on the [Web App support page](#)

### 5.1.3 The Help Menu

The following items are included in the Main Window's Help menu.

Icon	Action	Description
	<b>Online User Guide</b>	Links to the online User Guide. An internet connection is needed.
	<b>License Info</b>	Opens the license information including Customer ID, expiration date and number of users.
	<b>Approved Workman Forum</b>	Links to the <a href="#">Forum</a> which is an excellent place to get questions answered and see how others use the database.
	<b>Approved Workman Website</b>	Links to the home page of the <a href="#">Approved Workman website</a> .
	<b>About...</b>	Provides a bit of information about the Approved Workman database.

### 5.1.4 The Toolbar

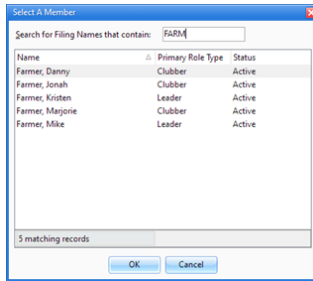


#### Search Members



Use this tool to quickly locate and open a member from anywhere in the Windows App. It is on the left side of the Main toolbar and is available from any module. To use **Search Members**:

1. Type a few characters of the first OR last name of any member in the **Search Members** text box.
2. Press **Enter** or click the **Perform Search** button. If a single member matches the criteria, that member's record is opened in the Member window. If there are multiple matches, the Select A Member dialog opens showing all members whose first or last names contain the entered text.



- If the desired member is listed, open the member record by double clicking or selecting the name and clicking OK. If there are still many names displayed, narrow the list by continuing to type in the **Search for Filing Names that contain:** field. The list will update as characters are typed.
- Click **Cancel** to discontinue the search without selecting a member.

## Window Manager



The following records open in separate windows and can remain open while using the Windows App: Members, Household Ledgers, Items and Orders. The windows are sometimes hidden by other windows. The Window Manager helps with navigation. It shows **No files are open** or **[#] windows are open** and lists each one in the drop-down menu. Select a window to bring it to the front.



The Main Menu bar's **Window** menu also provides organizing options: Cascade All, Minimize All, Restore All.

## Current Club Year

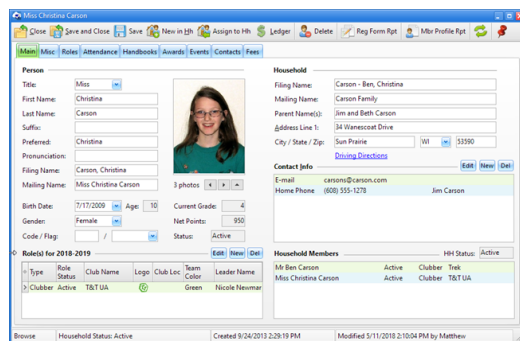
The **Current Club Year** indicates the year for viewing or creating data. Only data for that year is displayed throughout the database. This is normally the current club year, but to view or modify historical data, switch to a prior club year.

## Club Date

The **Club Date** indicates the current date for entering data. Change the date to view a date in the past. This is the default date used in many modules where a date is a required field. For example, in the Check-in Module when a handbook section is completed.

## 5.2 The Member Window

The Member Window provides a way to view and modify all a member's data in a single window. Multiple Member Windows can be open at one time. Easily switch between them using the Main Window [toolbar](#) or **Window** menu. **Stay on Top** (the red push pin) keeps a window on top of the Main Window.



There is a lot of information packed into this one window, so it is divided into tabbed pages:

- Main** - basic information such as person, role, household, contact, and household members
- Misc** - other information such as permissions, visit records, medical info, and notes

- [Roles](#) - overview of all roles; includes details about teams, registration, and uniform
- [Attendance](#) - all attendance related information for each club date such as attendance and points
- [Handbooks](#) - all handbooks assigned to the member. Manage books and mark sections completed
- [Awards](#) - all awards earned by the member. Open, delete, or create awards (most awards are created automatically when marking sections complete) as well as set the received status.
- [Events](#) - all events attended by the member. Open, delete, or create new event records.
- [Contacts](#) - all records of contacts made with the member. Open, delete, or create contact records.
- [Fees](#) - all fees for the member. Open, delete, or create new fee records. ([Fees for Dues](#) are created automatically when [Registration is set to "Current"](#). Fees can be set to be created automatically when [assigning a book](#) or [a uniform](#).)

### 5.2.1 The Toolbar

The Member Window's main toolbar provides buttons for the most common functionality. Other toolbars might appear in the tabbed pages for additional functionality for the selected page.



The table below describes what each button on the toolbar does.

<b>Icon</b>	<b>Action</b>	<b>Description</b>
	<b>Close</b>	Closes the Member window without saving current changes.
	<b>Save and Close</b>	Saves the changes and then closes the Member window.
	<b>Save</b>	Saves the changes and leaves the Member window open.
	<b>New in Hh</b>	Opens the <a href="#">Member Window</a> with some pre-filled values to create a new member (clubber or leader) in the selected household. This is the most efficient way to add members to an existing household.
	<b>Assign to Hh</b>	Assigns the selected member to a different household based on selection from a list of all households.
	<b>Open Hh Ledger</b>	Opens the Household Ledger for the selected member's family to <a href="#">manage fees and payments</a> .
	<b>Delete Member</b>	Removes the current member and closes the window. This process requires a confirmation.
	<b>Print Reg, Form</b>	Opens the Registration Form report dialog to print a <a href="#">registration form</a> for the selected member's family.
	<b>Print Member Profile</b>	Opens the Member Profile report dialog to print a <a href="#">member profile</a> for the current member.
	<b>Refresh</b>	Refreshes the data in the grid. If there is a concern about viewing the latest data, simply click this button.
	<b>Stay on Top</b>	Toggles whether or not the window stays on top of the main window.

## 5.2.2 Main

The **Main** tab of the Member Window tracks basic Member, Household, and Contact information and provides a list of Household Members.

### Member section

- **(Optional) Member External ID** - ten character text field to reference an ID from an external source (i.e. other software used to track church members). To make it visible, choose "**Show the external ID fields on the Member form**" under [Admin > System Settings > Options > Members](#)



The external IDs can be printed using the [Household and Member ID List](#) report. They can also be included on the [Household List - Contact Information](#) report. The individual external IDs can be shown on the main [Clubbers](#) and [Leaders](#) grids by [making the column visible](#).

- **Title** - selection options are determined by [Admin > System Settings > Generic Lookups > Titles](#). Selecting a gender specific title automatically sets the **Gender** field.
- **First Name, Last Name, Suffix, Preferred** - self explanatory!
- **Pronunciation** - text box for a phonetic spelling of a difficult-to-pronounce name.
- **Mailing Name** - filled automatically as other name fields are completed, but can be edited. Choose "**Use a member's Title when deriving the Mailing Name**" under [Admin > System Settings > Options > Members](#)
- **Photo** - displays the primary photo. Multiple photos can be kept for a member. Use the navigation buttons below the frame to view other photos or add a photo.



Double click the frame to open the [Photo Manager](#) for more photo options.

- **Birth Date - Age** and **Current Grade** will be calculated and are read-only.



The Grade can be changed in the [Role](#) if needed.

- **Gender** - set automatically if a gender specific title is used, but can be selected manually.
- **Net Points** - read-only field derived by calculating all of a members points for attendance, visitors, sections, etc. Spent points (entered through the [Club Store](#)) are deducted from the running total.
- **Code** - five character text field to discretely categorize or tag members. Any unique codes can be used, but it is important for leaders to know what they mean. For example:

"M" to indicate there are medical issues

"B" to represent clubbers who come with the bus ministry

"L" to represent a leader in law enforcement that could be called on for a security concern



In addition to being a column on the main Clubber grid, it is used on many Report dialogs to enhance selection criteria. It can optionally be printed on the Name Tags.

- **Flag** - 6 color options. This is a custom way to categorize or "flag" particular members. Like the **Code** field, this provides a discreet way to identify members. For example, a Red Flag could identify clubbers from a broken home where there might be a security concern. A Blue Flag could identify clubbers with a learning disability or behavioral problem. Members who need a new name tag printed or who owe money could be flagged. Note: unlike the Code field, this field is not used on report dialogs to enhance selection criteria. The Flag [column can be made visible](#) on the Clubber, Leader or Check-in grids.



Set flags for [multiple members at once](#) using the right click pop-up menu option on the Clubber or Leader grids.

- **Status** - read-only. A person's status is determined automatically based on the status of the roles in the current club year. Statuses include: **Active, Archived, Graduated, Inactive, Prospect** or **Visitor**.

### Role(s) for the Current Club Year

- The roles grid is read-only and provides summary information about role(s) in the current club year. Use the Member's [Roles tab](#) to see all roles as well as additional information for each role.
- To change a role record, select the record and then click the **Edit** button or double-click a row in the grid. This opens [the Roles dialog](#) which allows changes to the role.
- To add a role, click the **New** button.
- To remove a role, select the record and then click the **Delete** button.



When a role is deleted, all of the data associated to the role (attendance, team assignments, etc) are also deleted. Before deleting a role, first consider editing it.



There is also a right-click pop-up menu available in the grid to Edit, Add or Delete roles.

### Household

- **(Optional) Household External ID** - ten character text field to reference an ID from an external source (i.e. other software used to track church members). To make it visible, choose "**Show the external ID fields on the Member form**" under [Admin > System Settings > Options > Members](#).



The external IDs can be printed using the [Household and Member ID List](#) report. They can also be included on the [Household List - Contact Information](#) report. The household external IDs can be shown on the main [Households](#) grid by [making the column visible](#).

- **Filing Name, Mailing Name, Parent Name(s)** - filled automatically using the following defaults, but can be edited.
  - **Household Filing Name - Last Name** followed by a dash and a list of all **Preferred (First) Names**. Example: "Green - Sandy, Michael, Tina". In households where persons have different last names, the last names are listed in alphabetical order, separated by "/". Example: for Rebecca Brown, Chad Smith, and David Smith - "Brown/Smith - Rebecca, Chad, David".



To re-derive the Household Filing Name, delete the current value and TAB out of the field.

- **Mailing Name - Last Name** + "Family".
- **Parent Name(s)** - Mr. and Mrs. + **Last Name**.
- **Address Line 1** - street address.
- **City, State, Zip** - defaults to the City, State and Zip of your church, but can be modified.



To turn off this default, go to [Admin > System Settings > Options > Members](#). Uncheck the box for "**Use the Church's City, State and Postal Code as the default values when creating new members**".



Also under **Admin > System Settings > Options > Members**, choose to "**Overwrite City and State values when the Postal code changes and a match is found in the lookup table**". If City, State, and Postal Code values are specified under **Admin > System Settings > Generic Lookups > City, State, Zip**, skip City and State fields and type a zip code. City and State values are filled in. To make this the default, choose "**When tabbing through the address fields, skip the City and State and go directly to the Postal Code field**".

- **Driving Directions** - opens a dialog with a text box to track directions. Click **Print Preview** for a formatted report that includes contact information. This can be useful for a bus ministry.

### Contact Info

- The contact grid is read-only and provides summary information about the household's contact records.
- To change a contact record, double click a row in the grid or select a row in the grid and then click the **Edit** button. This opens the **E-Contacts dialog** which allows changes to the contact records.
- To add a contact record, click the **New** button.
- To remove a contact record, select the record and then click the **Delete** button.



Use the right-click pop-up menu in the grid to Open the E-Contacts dialog or Delete contact records.

### Household Members

- This grid lists any other members in the database associated to the household.
- To open another member's record, double click a name in the grid or use the right click pop-up menu.
- To add a new Household Member, use the **New in Hh** button in the toolbar.

## 5.2.3 Misc

The **Misc** tab of the Member Window tracks other useful information about the member such as Permissions, Medical and Visitor information, Notes, and Other miscellaneous items.

### Permissions

Indicate consent has been given to:

- participate in **Activities** (such as Game Time)
- **Travel**
- use a **Photo**
- **Release Medical** information
- **Other** - tracks a custom permission related item. When checked, a description can be entered.



## Medical Information

- **Special Needs** - enter additional details in the memo field under the medical information section.
- **Last Tetanus Shot** - tracks the date.
- **Include on Medical List report** - lists medical information along with contact information for the member when generating the formal report.
- **Allergic To** - text field. Enter additional information related to allergies or other medical information in the memo field directly below the listed allergy.
- **Doctor, Dentist and Insurance** - text fields for doctor and dentist contact information as well as insurance company and policy number.



Combo boxes are populated with known data to make it easy to select existing values when adding additional members to a household.



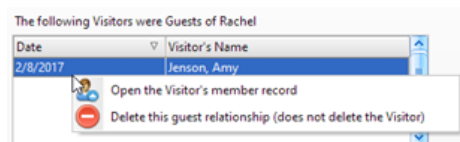
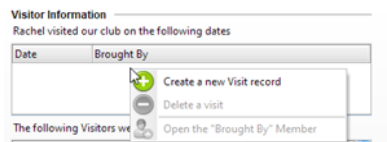
If the doctor, dentist or insurance info is updated for a member of the household, there will be an option to update the same information for all members of the household.

## Other

- **School Name** - selection options are determined by [Admin > System Settings > Generic Lookups > School Names](#). Select <new> to add a new value without switching to the Admin Module.
- **1st Language, 2nd Language** - selection options are determined by [Admin > System Settings > Generic Lookups > Languages](#).
- **Date Joined** - tracks when a clubber first **joined**. A member's **Status** can change from time to time, and the **Registration Date** changes for each club year; but this field doesn't change, so it allows tracking how long a member has been involved in the club.
- **Preferred Bible Translation - ESV, KJV, NIV, NKJV, Spanish**; used to filter the selection list when [assigning a handbook](#) to the member.
- **Christian** - when checked, the **Re-Birth Date** and **Baptism Date** fields are enabled.

## Visitor Information

This section has two grids: one for when this member **visited** and one for when this member **brought visitors**. To record data, right click in a grid and select from the pop-up menu.



These grids are intended for viewing visitor/visiting history or editing existing data. To [create a visitor record](#), click the **Add Visitor** button in the Check-in Module.

## Household Misc

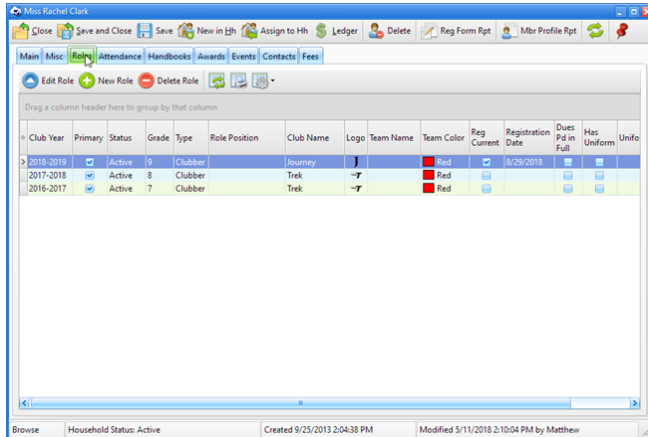
- **Family Church** - selection options are determined by [Admin > System Settings > Generic Lookups > Church Names](#). It defaults to your church. Selecting <new> invokes a dialog to add a new value.
- Select to not "Use our Church Name as the default Church Name value when creating new members" under [Admin > System Settings > Options > Members](#).
- **Persons authorized to pick up the children** - name(s) of person(s) authorized to pick up the clubber(s) from Awana. This field is only visible if the Role Type is Clubber.

## Notes

This section provides a memo field to track any additional information for the member.

## 5.2.4 Roles

The **Roles** tab provides an overview of all of a member's roles. It includes **Type** (clubber or leader) as well as **Club Name**. For leaders, it includes **Role position** (such as game director or listener). It also stores **Team (Color and/or Name)** information, **Grade** and **Leader** assignment (for clubbers), **Registration** and **Uniform** information.



As with most grids in the Windows App, this [grid is customizable](#).

### Toolbar

Besides the Member Window toolbar, there is another toolbar that is specific to the **Roles** page.

<b>Icon</b>	<b>Action</b>	<b>Description</b>
	<b>Edit Role</b>	Opens the selected role in the <a href="#">Roles dialog</a> . (Pressing the <b>Enter</b> key with a row selected or double clicking the row also opens the role record.)
	<b>New Role</b>	Opens the <a href="#">Roles dialog</a> with blank/default values to create a new role.
	<b>Delete Role</b>	Removes the selected role.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.


### 5.2.4.1 The Roles Dialog







Opening or creating a role record opens the Roles dialog to view, modify, or enter details of a member's role.



When role information changes, Attendance (session) records are also updated. Changes only apply to the records for the Current Club date and future dates to preserve historical data. This applies to **Status, Club Name, Team Name, Team Color, and Leader Name**. As an example, to change a member from the Red Team to the Blue Team on week 13, update the Role's Team Color. Attendance records for weeks 1-12 keep the team color as red. Attendance records for week 13 and all additional weeks will have the new team color of blue.

- **Club Year** - shows the current club year.
- **Primary** - when there are two roles in the same club year, this indicates which one is primary.
- **Status - Active, Archived, Inactive, Prospect or Visitor.** Setting a member's status is useful when [filtering grids](#) to show only selected members.
- **Type - Clubber or Leader.** If the type is Leader, the **Position** field is enabled to select a specific position. The selection options are determined by records under [Admin > System Settings > Generic Lookups > Roles](#).
  -  A person can only have one Clubber role. If a second role is added, the type will default to Leader with a position of Student Leader.
- **School Grade** - calculated based on age, but can be selected manually or changed.
- **Club Name** - automatically assigned based on grade and gender, but can be selected manually. Selection options are determined by [Admin > Club Setup > Club Names, Logos, Dues and Points](#).
- **Team Name** - selection options are determined by [Admin > Systems Settings > Generic Lookups > Team Names](#).
- **Team Color** - twelve colors are provided (or select None to indicate no team color).
- **Leader Name** (clubbers only) - selection options are based on active leaders. Selection list shows the leader's Club Name to facilitate leader assignments.

### Registration Info

- **Registration is current** - when checked, the date field is enabled. (It defaults to the current club date, but can be changed.)
  -  When the member record is saved after setting the registration to current, the database sets the member's status to "Active" and creates a fee record for annual dues, if applicable.
  -  The **Registration is current** checkbox is marked automatically when using the [Register and Post Payment dialog](#) or the [Registration Window dialog](#). To choose which permission related check boxes are set automatically when the registration is set to current, go to [Admin > System Settings > Options > Registration Form and Reports > Permission Defaults](#).
- **Dues are paid in full** - indicates all of the dues have been paid for the year.
  -  If this box is checked, all of the Dues Pd checkboxes in the (weekly) Attendance records will also be checked.
- **Has uniform** - if the uniform has not been earned yet, the description field can still be used to track the size for future use. Using the **Assign Uniform** button opens the [Assign Uniform dialog](#) to assist in creating a uniform fee. It will also set the Has Uniform fields.
  -  Updating a uniform fee's description also updates the **Has Uniform** text field. Also, deleting the fee clears the **Has Uniform** check box and text field.

## 5.2.5 Attendance

The **Attendance** tab provides an overview of the member's club attendance (and other attendance related items), handbook sections completed, and points for each week. The attendance and other categories are usually entered through the [Check-in grid](#), but can also be entered or edited here. For easier data entry, maximize the window.

Member	Club Dates	Team	Attend	Dues	Misc	Pt											
Club Name	Week	Date	Club	Church	Uniform	Bible	Book	Bonus	#Visitors	Game							
T&T UA	1	8/29/2018	Green	Team B	Newman, Nicc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>	0						
T&T UA	2	9/5/2018	Green	Team B	Newman, Nicc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>	0						
T&T UA	3	9/12/2018	Green	Team B	Newman, Nicc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>	0						
T&T UA	4	9/19/2018	Green	Team B	Newman, Nicc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>	0						
T&T UA	5	9/26/2018	Green	Team B	Newman, Nicc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>	0						
T&T UA	6	10/3/2018	Green	Team B	Newman, Nicc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>	0						
T&T UA	7	10/10/2018	Green	Team B	Newman, Nicc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>	0						
T&T UA	8	10/17/2018	Green	Team B	Newman, Nicc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>	0						
T&T UA	9	10/24/2018	Green	Team B	Newman, Nicc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>	0						
T&T UA	10	10/31/2018	Green	Team B	Newman, Nicc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>	0						
T&T UA	11	11/7/2018	Green	Team B	Newman, Nicc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>	0						
T&T UA	12	11/14/2018	Green	Team B	Newman, Nicc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>	0						
T&T UA	13	11/21/2018	Green	Team B	Newman, Nicc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>	0						
T&T UA	14	11/28/2018	Green	Team B	Newman, Nicc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>	0						
T&T UA	15	12/5/2018	Green	Team B	Newman, Nicc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>	0						
T&T UA	16	12/12/2018	Green	Team B	Newman, Nicc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>	0						
T&T UA	17	1/2/2019	Green	Team B	Newman, Nicc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>	0						
T&T UA	18	1/9/2019	Green	Team B	Newman, Nicc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	<input checked="" type="checkbox"/>	0						
32 weeks										20	14	31	\$0.00	19	19	0	0



As with most grids in the Windows App, this [grid is customizable](#).

When a checkbox is marked, the **Total Points** field for the selected week is adjusted according to the points assigned under [Admin > Club Setup > Clubs, Logos, Dues and Points](#).

This grid provides a big picture view of a clubber's entire club year. It shows the complete history of attendance and all other categories including sections completed and points spent. There are totals for most columns in the grid footer. Use the **Preview/Print** button to get a hard copy.

## 5.2.6 Handbooks

The **Handbooks** tab provides an overview of all a member's handbooks. Marking completed sections is usually done from the [Check-in grid](#); however, this page is useful to enter historical information such as handbooks completed in a prior club year or sections completed on a prior club date.

Current	Primary	Name	Base Club	Award Set	Done	% Complete	Date Completed	Note
<input checked="" type="checkbox"/>		Flight 3:16 (Yr1)	Sparks	Jewels	<input checked="" type="checkbox"/>	100%	9/4/2013	
<input checked="" type="checkbox"/>		HangGlider	Sparks	Jewels	<input checked="" type="checkbox"/>	100%	3/25/2015	
<input checked="" type="checkbox"/>		WingRunner	Sparks	Jewels	<input checked="" type="checkbox"/>	100%	9/7/2016	
<input checked="" type="checkbox"/>		SkyStormer	Sparks	Jewels	<input checked="" type="checkbox"/>	100%	1/18/2017	
<input checked="" type="checkbox"/>		SkyStormer Frequent Flyer	Sparks	Jewels	<input checked="" type="checkbox"/>	100%	4/12/2017	
<input checked="" type="checkbox"/>		Start Zone Ultimate Adventure	Truth & Tri	Seals	<input checked="" type="checkbox"/>	100%	8/30/2017	
<input checked="" type="checkbox"/>		Ultimate Adventure 1 (2010)	Truth & Tri	Emblems	<input checked="" type="checkbox"/>	100%	10/31/2018	
<input checked="" type="checkbox"/>		Start Zone (Yr1)	Truth & Tri	Emblems	<input checked="" type="checkbox"/>	100%	9/5/2018	
<input checked="" type="checkbox"/>		Evidence of Grace	Truth & Tri	Emblems	<input checked="" type="checkbox"/>	100%		

Click 'Calculate' to view stats for the selected handbook

Number of required sections completed This Year / Total:  /






Average number of sections completed per week this year:

Estimated completion date based on current average:

Average needed to finish this club year ending 4/24/2019:

## Toolbar

Besides the Member Window toolbar, there is another toolbar that is specific to the **Handbooks** page.

<u>Icon</u>	<u>Action</u>	<u>Description</u>
	<b>Assign Handbook</b>	Opens the Assign Handbook dialog to <a href="#">assign a new handbook</a> to the selected member.
	<b>Open Handbook</b>	Opens the <a href="#">generic handbook window</a> for the selected handbook to show details about the book and the award triggers.
	<b>Delete Handbook</b>	Removes the selected handbook from this member's records.
	<b>Open Inventory Item</b>	Opens the selected handbook's related inventory item in the <a href="#">Inventory Item Window</a> .
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.

- **Entry Mode** - controls what happens as sections are marked.
  - **Normal** - points are tallied as sections are marked. If an award is earned upon completion of a section, it is automatically created.
  - **History** - no point calculations and only book level awards are generated. Completed sections must be marked one at a time. Use this to enter historical data for a small number of sections done prior to the current club year.
  - **Speed** - no point calculations and only book level awards are generated. Sections do not need to be marked one at a time. Instead, simply mark the last completed section and ALL of the prior sections are marked automatically. Use this when entering historical data for a large number of sections completed prior to the current club year when actual completion dates are not significant.
- **use date of** - date used when a section is marked. It defaults to the current club date, but can be modified when marking sections from a different date.

## Handbooks Grid

All handbooks that have been assigned to the clubber are shown along with the following information:


- **Current** - indicates the clubber is actively working in the handbook. There can be more than one current book (for example, a clubber might still be working on Review or Extra Credit work in another book, or completing an unfinished book from a previous club.) All current books are available as a choice in the [Check-in Module's Sections Grid](#) for marking sections.
- **Primary** - indicates the clubber's main handbook. This book is displayed in the Primary Book column of the [Clubbers](#) and [Check-in](#) grids.
- **Name** - of the handbook.
- **Award Set** - available award sets for books where more than one type of award can be earned. This determines the type of award to trigger (for example, to use up an inventory of old awards instead of a new set to be associated with the book).
- **Done** - indicates a book is completed.



A handbook is normally marked as **Done** automatically when the last required section is completed. Manually select this check box only when entering historical data. Doing so requires a confirmation to continue and asks for a **Completion Date** which is used for all blank required sections of the book.



When entering historical data for BOOKS that were completed PRIOR to the current club year, do NOT tediously mark all of the sections completed. Instead, use the **Done** check box to indicate the book was completed. If the actual Completion Date is known, enter it. If not, enter a date that is PRIOR to the current club year. Otherwise, the clubber will get credit for completing the book in the current club year. If the exact date of completion is not known, a good rule of thumb is to select the last date of the prior club year.

- **% Complete** - shows the percent of required sections completed in the handbook.
  - **Date** - of completion. This defaults to the current club date when the **Done** check box is marked, but can be modified. For the clubber to get credit for completing the book during the current club year, select a valid club date in the current club year. (See Tip under "Sections Grid" below.)
  - **Calculate** button - fills in the statistics below the grid for the selected handbook. This is especially useful near the end of the club year to estimate if the clubber will be able to complete a handbook on time.
-  To view this information for multiple clubbers, use the formal report "[Current Handbook Status](#)" and select the "Summary" type. This will help in planning an end of year award supply order.

## Sections Grid

The right side of the Handbook page contains a **Sections Grid** which displays the sections applicable to the selected handbook. The [Sections Completed Grid](#) of the Check-in module is generally used to enter sections completed, but they can also be entered here.

- **Handbook** - displays the handbook currently selected in the main grid and percent completed
- **Required**, and **Review/Extra Credit** tabs - Sections in the **required** group must be completed to get a book award. Sections in the **review** or **extra credit** group are optional. Click on the desired tab to show the relevant **Sections Grid**:
  - **Section Name** - description matching the section in the handbook
  - **Done** - indicates a section has been completed
  - **Date** - of section completion (defaults to **use date of**: selection in the toolbar, but can be modified)
- **Notes** tab - tracks any additional details pertaining to the specific handbook for this member

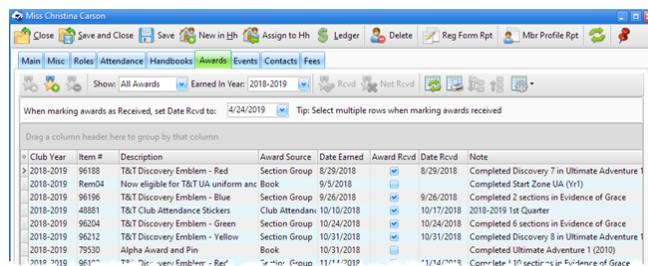


When entering historical data for SECTIONS (in an incomplete book) completed PRIOR to the current club year, the **Completion Date** should be PRIOR to the current club year. Otherwise, the clubber will get credit for the completed sections in the current club year. If the exact date of completion is not known, use the last date of the prior club year.

## 5.2.7 Awards



The **Awards** tab provides an overview of a clubber's awards. It is helpful for reviewing and managing the awards for the specific member. See the [Awards Module](#) for details.



Club Year	Item #	Description	Award Source	Date Earned	Award Rcvd	Date Rcvd	Note
2018-2019	96188	T&T Discovery Emblem - Red	Section Group	8/29/2018	<input checked="" type="checkbox"/>	8/29/2018	Completed Discovery 7 in Ultimate Adventure 1
2018-2019	Rem04	Now eligible for T&T UA uniform anc	Book	9/3/2018	<input checked="" type="checkbox"/>		Completed Start Zone UA (Yr1)
2018-2019	96196	T&T Discovery Emblem - Blue	Section Group	9/26/2018	<input checked="" type="checkbox"/>	9/26/2018	Completed 2 sections in Evidence of Grace
2018-2019	48881	T&T Club Attendance Stickers	Club Attendance	10/10/2018	<input checked="" type="checkbox"/>	10/17/2018	2018-2019 1st Quarter
2018-2019	96204	T&T Discovery Emblem - Green	Section Group	10/24/2018	<input checked="" type="checkbox"/>	10/24/2018	Completed 6 sections in Evidence of Grace
2018-2019	96212	T&T Discovery Emblem - Yellow	Section Group	10/31/2018	<input checked="" type="checkbox"/>	10/31/2018	Completed Discovery 8 in Ultimate Adventure 1
2018-2019	79530	Alpha Award and Pin	Book	10/31/2018	<input checked="" type="checkbox"/>		Completed Ultimate Adventure 1 (2010)
2019-2020	96111	T&T Discovery Emblem - Red	Section Group	11/11/2019	<input checked="" type="checkbox"/>	11/16/2019	Completed 1st section in Evidence of Grace

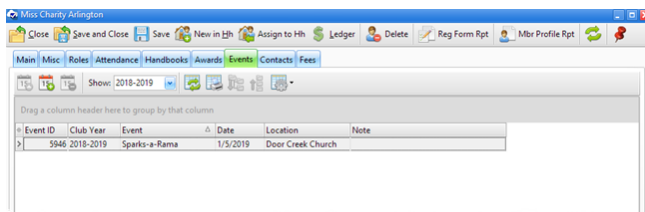
## Toolbar

Besides the Member Window toolbar, there is another toolbar that is specific to the **Awards** page.

Icon	Action	Description
	<b>Open Award</b>	Opens the selected award in the <a href="#">Award dialog</a> . (Pressing the <b>Enter</b> key with a row selected or double clicking the row also opens the award.)
	<b>New Award</b>	Opens the <a href="#">Award dialog</a> with blank/default values to create a new award.
	<b>Delete Award</b>	Removes the selected award.
	<b>Show</b>	Filters the data in the grid. Choose to show <b>All Awards</b> , <b>Not Received</b> or <b>Received</b> awards. <b>Earned in Year</b> limits records to awards earned in the selected club year.
	<b>Rcvd</b>	Marks the selected award(s) as having been received by the member. <b>When marking awards Received</b> , set <b>Date Rcvd to:</b> defaults to the current club date. When working with awards received on a different date, change the date before clicking the <b>Rcvd</b> button.
	<b>Not Rcvd</b>	Marks the selected award(s) as <i>not</i> being received by the member yet.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.

## 5.2.8 Events

The **Events** tab provides an overview of events a clubber attended. See the [Events Module](#) for details.



## Toolbar

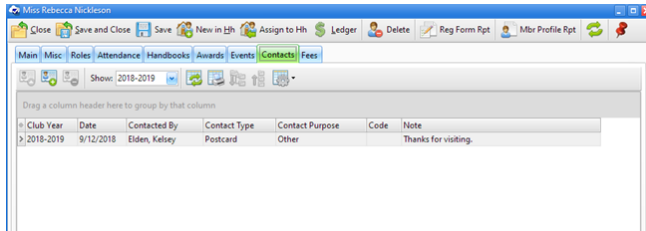
Besides the Member Window toolbar, there is another toolbar that is specific to the **Events** page.

Icon	Action	Description
	<b>Open Event</b>	Opens the selected event in the <a href="#">Event dialog</a> . (Pressing the <b>Enter</b> key with a row selected or double clicking the row also opens the event.)
	<b>New Event</b>	Opens the <a href="#">Event dialog</a> with blank/default values to create a new event.
	<b>Delete Event</b>	Removes the selected event.
	<b>Show</b>	Filters the data in the grid based on Club Year. Defaults to the current club year but can be changed.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.

## 5.2.9 Contacts



The **Contacts** tab provides an overview of leader contacts with the clubber outside of club sessions. See the [Contacts Module](#) for details.



### Toolbar

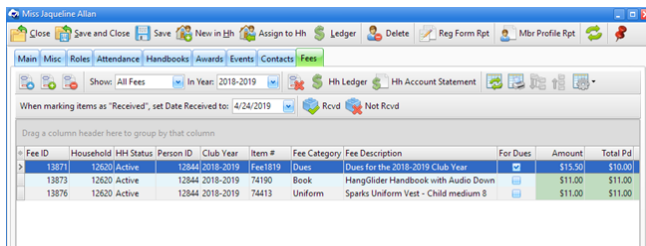
Besides the Member Window toolbar, there is another toolbar that is specific to the **Contacts** page.

<u>Icon</u>	<u>Action</u>	<u>Description</u>
	<b>Open Contact</b>	Opens the selected contact in the <a href="#">Contact dialog</a> . (Pressing the <b>Enter</b> key with a row selected or double clicking the row also opens the contact.)
	<b>New Contact</b>	Opens the <a href="#">Contact dialog</a> with blank/default values to create a new contact.
	<b>Delete Contact</b>	Removes the selected contact.
	<b>Show</b>	Filters the data in the grid based on Club Year. Defaults to the current club year but can be changed.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.

## 5.2.10 Fees












The **Fees** tab provides an overview of a member's fees. See the [Ledger Module](#) for details.





## Toolbar

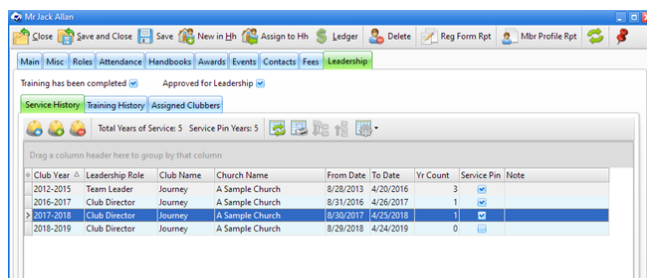
Besides the Member Window toolbar, there is another toolbar that is specific to the **Fees** page.

Icon	Action	Description
	<b>Open Fee</b>	Opens the selected fee in the <a href="#">Fee dialog</a> . (Pressing the <b>Enter</b> key with a row selected or double clicking the row also opens the fee.)
	<b>New Fee</b>	Opens the <a href="#">Fee dialog</a> with blank/default values to create a new fee for this member.
	<b>Delete Fee</b>	Removes the selected fee. This process requires a confirmation.
	<b>Show</b>	Filters the data in the grid. Choose to show <b>All Fees, Paid Fees, or Unpaid Fees. In Year:</b> limits records to fees in the selected club year.
	<b>Waive Fee(s)</b>	Waives any balance on the selected Fee(s). This creates a payment record of type "Waived" and lists your club name as the Payor.
	<b>Open Hh Ledger</b>	Opens the Household Ledger for the selected member's family to <a href="#">manage fees and payments</a> .
	<b>Hh Acct. Statement</b>	Opens the <a href="#">Household Account Statement</a> report dialog. The selection criteria defaults to the member's household.
	<b>Rcvd</b>	Marks the selected fee item(s) as having been received by the member. <b>Set Date Received to:</b> defaults to the current club date. For items received on a different date, change the date before clicking the <b>Rcvd</b> button.
	<b>Not Rcvd</b>	Marks the selected fee item(s) as <i>not</i> having been received by the member yet.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.

## 5.2.11 Leadership



This tab is only visible if there is a role with a **Type** of **Leader**. It tracks the details of a leader's service and training, as well as listing clubbers assigned to the leader.







Club Year	Leadership Role	Club Name	Church Name	From Date	To Date	Yr Count	Service Pin	Note
2012-2015	Team Leader	Journey	A Sample Church	8/28/2013	4/20/2016	3	<input checked="" type="checkbox"/>	
2016-2017	Club Director	Journey	A Sample Church	8/31/2016	4/26/2017	1	<input checked="" type="checkbox"/>	
2017-2018	Club Director	Journey	A Sample Church	8/30/2017	4/25/2018	1	<input checked="" type="checkbox"/>	
2018-2019	Club Director	Journey	A Sample Church	8/29/2018	4/24/2019	0	<input checked="" type="checkbox"/>	

At the top are check boxes to indicate: the **Training has been completed** and the leader has been **Approved for Leadership**.

### Service History

[Service History records](#) are created automatically as leader records are created and roles are assigned.





<u>Icon</u>	<u>Action</u>	<u>Description</u>
	<b>Open Service Record</b>	Opens the selected service record in the <a href="#">Service dialog</a> . (Pressing the <b>Enter</b> key with a row selected or double clicking the row also opens the service record.)
	<b>New Service Record</b>	Opens the <a href="#">Service dialog</a> with blank/default values to create a new service record.
	<b>Delete Service Record</b>	Removes the selected service record.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.



Credit for service (for year counts) are triggered based on the attendance requirement set under [Admin > System Settings > Awards > Leadership Service Awards](#).

### Training History

The Windows App can automatically create user-defined Training records when adding a new leader based on settings under [Admin > System Settings > Generic Lookups > Leadership Training](#).

<u>Icon</u>	<u>Action</u>	<u>Description</u>
	<b>Open Training Record</b>	Opens the selected training record in the <a href="#">Training dialog</a> . (Pressing the <b>Enter</b> key with a row selected or double clicking the row also opens the training record.)
	<b>New Training Record</b>	Opens the <a href="#">Training dialog</a> with blank/default values to create a new training record.
	<b>Delete Training Record</b>	Removes the selected training record.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.

### Assigned Clubbers

If clubbers have been assigned to a leader, either from the [Clubbers Module](#) pop-up menu or the Member's Role record, all of the assigned clubbers are listed in this grid.

## 5.3 Working with Inventory

The Inventory module contains all items in the Awana Ministry Supply Catalog. It helps track the quantity of items in stock. The [Order form](#) makes it easy to build and track supply orders. When a shipment is received, marking the items as received in the Order form replenishes the Inventory Quantities in Stock. Below are examples with links to related topics. See additional information in the [Inventory Module](#).

### Examples

When an award is triggered, the award item's Quantity in Stock is reduced. When a new handbook or uniform is assigned, the quantity in stock can be reduced if the option is selected on the dialog.

To view items that need to be ordered, on the Inventory grid, select to **Show:** "Items we use and need to order" to display items that have a Qty in Stock less than the set Re-Order level. [Select all the desired rows](#) and choose 'Add the selected items to an Order' from the Action dropdown or the right click pop-up menu.

Open and review an Order under **Inventory > Orders**. Add additional items and adjust quantities if needed. [Place the order](#) with Awana Clubs International through the Online Store. Then, change the Order Status to Submitted so it can no longer be modified.

When an order arrives, open the Order and set the status to Received. Check boxes will be shown in the Line Items grid. Mark each item as received as the shipment is verified. The item's Quantity in Stock will be increased by the appropriate amount. After all items are marked as received, the Awana Order Number and Invoice fields can be updated. When all work on the Order is complete, change the Status to Closed.

### 5.3.1 Initial Inventory Setup

For Inventory Tracking to work correctly, the database inventory needs to match your current inventory and be set up with your preferences.

In the Inventory Module, select the [Items](#) tab, then:

1. Limit the number of items in the grid by indicating which items you use as follows:

- Select **Show: Items we use**. For items you DON'T use, select the record(s) and choose **Mark the selected record(s) as Not In Use** from the **Action** menu or the right click pop-up menu.
- Select **Show: Items we don't use**. For items you DO use, select the record(s) and choose **Mark the selected record(s) as In Use**.



To speed up the process, [manipulate the records in the grid](#) in ways that limit the records, then select multiple records at once before marking as in use or not in use.



We recommend that inventory items NOT be deleted. Simply set them to 'not in use' so they do not initially show in the grid.

2. Add additional items to the inventory that you use that are not in the Awana Catalog.

3. Modify the **Sell Prices**. This is the price you charge for items. It may differ from the Awana Catalog price (for example, rounding up to cover shipping costs). The Sell Price is used when [creating a fee](#).

4. Enter how many of each item you have on hand in the **Quantity in Stock** field.

5. Set the [Inventory Tracking](#) preferences.

With all of this set correctly, as awards and fees are created and orders are received, the inventory quantities are adjusted automatically and accurately!

### 5.3.2 Inventory Tracking

The Inventory Tracking preferences determine how the inventory quantities are managed.

1. Under [Admin > System Settings > Options > Inventory and Ordering](#), all of the following preferences are set and can't be edited:

- a. Automatically reduce the Inventory count of related items when a new Award or a Fee is created



Awards are triggered automatically. With this set, the **Quantity in Stock** will be adjusted.

- b. Automatically increase the Inventory "**Quantity in Stock**" when orders are marked as "**Received**" and the line items are checked in

- c. Automatically add line items to an open supply order when the Inventory Item's **Order Level Quantity** is reached



This feature is not available in the Windows App.

- d. When adding new Line Items to an Order, display the **Expense Category** column and populate it with the default value as set in the related Inventory record

2. Under **Admin > System Settings > Options > Misc**, choose default values to use to **Reduce the Inventory Qty in Stock** when a handbook or uniform is assigned.



In addition to reducing the Qty in Stock, choose default settings to automatically **Create a Fee** for each book or uniform assigned (if the Inventory Sell Price is more than one cent), and to **Mark each book or uniform as having been received**.

### 5.3.3 Placing an Order

To create an order, click the **New Order** button above the [Orders grid](#) in the [Inventory Module](#). Here is an overview of the process:

- Open** - the default **Status** when an order is created. Each item to be ordered should have a line item entry in the grid in the lower section. To add items to the order:
  - Click the **New Line Item** button above the grid. A new row will be displayed.
  - Either select from the drop-down menu or type an **Item Number** or **Description**.
  - Update the **Qty Ordered** if needed. **Line #**, **Pkg Qty**, **Cost**, and **Extension** are filled automatically.

Comments entered here will appear on the printed order form.

Comments entered here will not appear on the printed order form. They are for your internal use only.

Line #	Base Club	Item Number	Description	Expense Category	Pkg Qty	Qty Ordered	Cost	Extension
17	Sparks	74892	Sparky Award Plaque and Award Pin	General	1	7	\$10.99	\$76.93
18	Truth_Trst	48339	T&T Church Attendance Stickers	Designated	28	2	\$1.99	\$3.98
19	Truth_Trst	80331	T&T Ultimate Challenge Book One - NKJV	Designated	1	3	\$15.75	\$47.25
20	Cubbies	11075	AppleSeed Trail Emblem	Designated	5	1	\$6.99	\$6.99
21	Sparks	77861	WingRunner Handbook with Audio Download - NKJV	Designated	1	1	\$10.99	\$10.99
							\$132.76	\$412.97

- Submitted** - use when the order has been placed as desired with Awana (via internet, phone, e-mail, etc.).

Here is an example of a printed Order form:

Customer # 123456789	Awana - Supply Order P.O. Box 987 Streamwood, IL 60107-0987	Phone: 1-866-292-6227 Fax: 1-877-292-6232 Online: www.awana.org/store E-mail: awanaservice@awana.org	Order # (office use only)			
Church Name A Sample Church 4917 Example Street Madison, WI 53714	Contact Janice Allan 608-608-6088 jallen10@hotmail.com	Ship To Janice Allan 876 Worth Ave Madison, WI 53714	Shipping Method UPS Residential			
Church Purchase Order		Comments				
Line #	Item Number	Qty	Item Description	Pkg Qty	Price	Extension
1	47108	1	Awana Grand Prix Trophy Design Plates	3	\$1.99	\$1.99
2	95165	1	Awana Grand Prix Participation Certificate	10	\$3.29	\$3.29
3	95174	1	Awana Grand Prix Poster Set	3	\$4.99	\$4.99
Subtotal:						\$10.27
Tax:						
Shipping/Handling:						
Order Total:						\$10.27

3. **Received** - use when the order arrives. The **Rcvd**, **Qty Rcvd** and **Qty B/O** columns show in the grid. As the **Rcvd** box is marked, the **Qty Rcvd** defaults to the total Qty Ordered and Qty B/O defaults to zero. Update these values as needed to reflect the correct quantities received.

The order is Received. Rcvd, Qty Rcvd, and Cost fields may be edited.

Line #	Base Club	Item Number	Description	Expense Category	Pkg Qty	Rcvd	Qty Ordered	Qty Rcvd	Qty on B/O	Cost	Extension
16	Avana	79556	Excellence Award and Pin	General	1	<input checked="" type="checkbox"/>	13	13	0	\$10.59	\$137.67
17	Sparks	74392	Sparky Award Plaque and Award Pin	General	1	<input checked="" type="checkbox"/>	7	7	0	\$10.99	\$76.93
18	Truth, T.	48899	T&T Church Attendance Stickers	Designated	25	<input checked="" type="checkbox"/>	2	2	0	\$1.99	\$3.98
19	Truth, T.	80531	T&T Ultimate Challenge Book One - NKV	Designated	1	<input checked="" type="checkbox"/>	3	0	3	\$15.75	\$47.25
20	Cubbies	11075	AppleSeed Trail Emblem	Designated	5	<input checked="" type="checkbox"/>	1	0	1	\$6.99	\$6.99
21	Sparks	77981	WingRunner Handbook with Audio Download	Designated	1	<input checked="" type="checkbox"/>	1	0	1	\$10.99	\$10.99
										\$132.76	\$412.97

Notes:

You will not have to manually update your inventory records when you receive your supply order because as you mark each line item as received, your inventory Qty in Stock values are automatically increased by the Qty received.

Sales Tax: \$0.00  
Shipping/Handling: \$0.00  
Total: \$460.98

4. **Closed** - use after the **invoice paid** check box is marked and the corresponding **Paid Invoice #** is entered.

## 5.4 Working with the Ledger

The [Ledger Module](#) shows the big picture of the financial records. Use the flexibility of its Fees and Payments grids to [filter](#) or [group](#) the records to view relevant data and totals.



To view financial records for a single household, use the [Household Ledger](#). To view financial records for a single member, use the Member Window's [Fees](#) tab.

Records in the ledger track fees and payments. Having accurate records of purchases and payments helps instill confidence in parents that the program is run well. This section explains the basics of maintaining these records and points to other sections for more details.

### Fees

Besides fees for dues, a fee should be created whenever a member receives an item for which payment is expected. Fees for dues, handbooks, and uniforms can be automatically created. Fees for items such as handbags need to be created manually. Fees for awards are generally not necessary since they are given to clubbers free of charge, but if a clubber repeatedly loses his award badges, a Fee record can be created. Fees can be created or opened from the [Ledger Module](#) or the [Household Ledger](#).



A fee can be created for any item in the Inventory Module. The fee amount is determined by the item's **Sell Price**. If the item is not in the Fee Dialog's item list, [open the item](#) and click the [Club Usage](#) tab. Ensure the item is marked as 'in use' and that it should be displayed as a **choice in any Fee list**.

### Payments

As members pay for dues or purchased items, post the payments and apply the payments to applicable fees. If an over-payment occurs, part of the payment is "unapplied" as a credit on the account. When another Fee record is created, "apply" the unapplied payment amount to the new Fee.



During registration it can be common to receive payments but not have fee records yet. Post the payment in the Household Ledger. It is tracked as an "Unapplied" payment that can be applied later.



Payments can be *viewed* in the [Ledger Module](#) or [Household Ledger](#), but the Household Ledger must be used to [create/post payments](#).

## Waiving a Fee

Most Awana programs allow kids to attend who are unable to pay for dues, books, or uniforms. Even if a fee is not expected to be paid, create the fee record anyway so the inventory is maintained as well as accounting for where items were used. Zero-out the household balance by waiving the fee. This helps track expenses the club has to cover and determine how much money is needed for the Scholarship Fund. Totals can be viewed in the [Ledger > Fees](#) and [Ledger > Payments](#) grid footers.

When an entire fee is waived, a payment record is created of **Type** "Waived" with your club name as the **Payor**. If a partial amount is waived, a payment record is created of **Type** "Account Credit". From the Ledger tab's Fees grid, waive a fee by [selecting one or more](#) records. Use the **Waive** button in the toolbar or right click and select **Waive** from the pop-up menu. Confirm by clicking **Yes**.

From the Household Ledger, there are two different ways to waive a fee balance:

- Select "**Waived**" as the **Payment Type**. Checkboxes appear in the first column of the Fees grid to select which fee records to waive. As Fees are selected, the **Total** amount of the waived payment is calculated. When finished, click **Post the Payment**.
- Select the fee record to be waived. Use the **Waive Fee** button above the grid, or right click and select **Waive Fee** from the pop-up menu. Confirm by clicking **Yes**.

## Example Scenario

A child receives a new book and the parent says, "If you tell me how much I owe, I'll bring the money next week." You reply, "A book costs \$15.00, but let me check your balance." You are in the [Check-in Module](#) so you type a few characters of the last name in the **Search** field and press **Enter**. This hides all other records except that family. You click on the Household Ledger button in the toolbar. The **Household Balance** shows \$11.00. You explain there was extra money received from a uniform payment. (The unapplied payment of \$4.00 was then applied to the book fee.) Using the button in the toolbar, you print a [Household Account Statement](#) as a reminder.

The parent is surprised and impressed that you keep such accurate records and decides to pay \$15. The next week the clubber brings the money with the Account Statement which has a note to donate the extra money to the scholarship fund. In the household ledger, you [post a payment](#) for \$15.00, applying it to the book fee. This results in a \$4.00 unapplied payment. On the Unapplied Payments tab, select the \$4.00 payment and click the "Apply this amount as a donation" button to zero out the household balance.

## 5.5 Using the Windows App in Kiosk mode

The Windows App can be set up to handle basic check-in of members at a kiosk. Kiosk mode opens a simplified check-in dialog in full-screen mode. There are three simple steps to checking in members:

**Step 1: Search for the family:** type a few characters of a family name or the last 4 digits of the primary phone number, then press **Enter** or click **Search**. Matching family records are displayed for selection.

7/30

**Step 2: Select a family:** click a row to select the family with members to check-in; click **Next**.



If only one family meets the criteria, the database will use that family's information and go to Step 3.

**Step 3: Select the family members who are present on the Current Club Date.** Click **Back** to return to the previous screen if needed. Click **Done** when finished.

Welcome to A Sample Church. Please check in. Current Club Date: 4/24/2019

Use this field to display instructions and/or announcements at the top of the screen

Step 3: Select the family members who are present on 4/24/2019

Present	Name	Status	Mbr Type	Club Name
<input checked="" type="checkbox"/>	Yvonne	Active	Clubber	T&T UA
<input checked="" type="checkbox"/>	Claudia	Active	Leader	Awana
<input checked="" type="checkbox"/>	Joseph	Active	Leader	T&T UA

Step 4: Click "Done" to complete the check-in.

< Back Done

## Setting up Kiosk mode

In order for kiosk mode to be launched, there must be a [User](#) record with an **Account Type** of "Kiosk". The user record can be for a person authorized to set up the kiosk, or for a specific computer used as the kiosk. (For example, user name "Lobby" or "Lobby 1").

When [logging in](#) with an account type of "kiosk", the kiosk dialog opens full-screen. Once logged in, preferences can be set by using the menu button in the upper right corner and selecting **Admin Options** from the drop-down.



To access admin options, the name and password of either an Admin or Kiosk user must be provided.

Welcome to A Sample Church. Please check in. Current Club Date: 4/24/2019

Use this field to display instructions and/or announcements at the top of the screen

Enter any Instructions and/or Announcements you want to show at the top of the kiosk screen. Tip: If you want to change the font style and color, type your Instructions and/or Announcements in WordPad and then copy and paste the text into the field

Use this field to display instructions and/or announcements at the top of the screen

Color Theme Style: Blue The Color Theme Style affects the appearance of the Kiosk Screen. This value is saved for each Kiosk User Account.

Number of Seconds Before Automatic Reset: 30 If a kiosk user starts the check-in process but does not finish and just walks away, the automatic reset will return to Step 1 and clear the search field.

Print Nametags for Clubbers Nametag Label Size: 2.4" x 3.5" If you have a label printer attached to the Kiosk computer, select this option to print a nametag for each child marked as "present". You also have the option to print a separate security tag to be used by any person picking up the children.

Print a Security Pickup Tag 2.25" x 4.0"

Important: Be sure you have the label printer set as the DEFAULT printer for this workstation. If you change the default printer AFTER you have launched this Kiosk, you will need to exit and restart AWB kiosk so it will recognize the new default printer.

Close Admin Options

The following items can be customized:

**Instructions/Announcements** - the text that will be displayed at the top of the kiosk screen

**Color Theme Style** - this value is saved for each Kiosk User account

**Number of seconds before automatic reset** - after the set number of seconds of inactivity, the screen is reset to Step 1, clearing any other data from the screen

**Print Name tags for Clubbers** - check the box to enable printing, then select a **Name tag Label Size** in the box. A separate label will print for each clubber and will include **First** and **Last** name, **Club Name**, **club location**, and primary phone number (including the contact person's name) along with a security pickup code and a current date and time stamp.

**Print a Security Pickup Tag** - if clubber name tags are printed, a parent pickup label can optionally be printed as well. The parent label lists all clubbers in attendance along with the security pickup code.



Be sure the label printer is set as the DEFAULT printer for the workstation. If the default printer is changed after launching the Kiosk mode, exit and log in again in order for the Windows App to recognize the new default printer.

### **Exiting Kiosk mode**

Exit kiosk mode by using the menu button in the top right corner and selecting one of the following:

**Exit Kiosk mode and Switch Users** - exits kiosk mode and launches the log-in dialog to allow log in as a non-kiosk user

**Exit the application** - closes the kiosk dialog and shuts down the database



To prevent the database from being shut down by an unauthorized person while in kiosk mode, a user name and password must be provided from an Admin or a Kiosk user to exit.



# **Chapter**

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## 6 The Log-in Dialog

The Log-in dialog checks credentials before allowing access to the database. Each person that is allowed to access the database should have a separate user account.



Do not create generic accounts with generic passwords that everyone knows! Multiple user accounts can be created under [Admin > Users](#). Subscriptions are based on number of users logged in at once. There may be more user accounts than the subscription tier limit.

This section explains details of the Log-in dialog. For an overview, see [Logging in to the Windows App](#).

- **Customer ID** - assigned customer number for your database
- **User Name / Password** - credentials that allow access for a [user](#). An admin user can add users and assign passwords.
  -  Having unique user accounts allows each person to have customize grid layouts and [select a theme/skin](#). When records are added or modified, the timestamp and user ID will be more accurate. Also, some users should have [limited permissions](#) while others should have full Administrator access.
- **Log In** - verifies the **Customer ID**, **User Name** and **Password** are valid. If a user is already logged in to the database and attempts to log in again, a warning message appears asking to reset the account (thus closing the program that is already running).
  -  If the maximum number of users (based on subscription tier) are already logged in, a message will be displayed. If the database thinks YOU are already logged in, a different message will be displayed and provide an option to reset the account. Only use this option if you are certain no one else is using your account. In that case it is OK to reset your account, otherwise click **No** and exit the Log-in dialog.
 

Note: If the database was not able to shut down and log a user out properly (for example, there was an error message that forced a shutdown), this message will appear. In this case, reset the account and continue with the log in.
- **Exit** - closes the Windows Ap application without attempting to log in.
- **Version Number** - updates are periodically released to fix defects and add features. When an update is applied, a newer version number will be displayed.
- **Notifications** - messages regarding updates or maintenance will be displayed in the cloud.

# **Chapter**

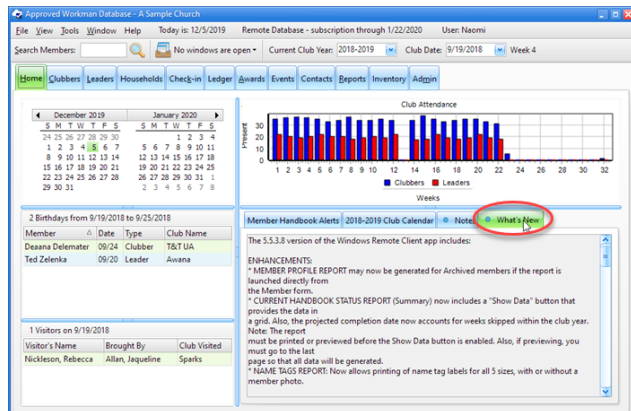
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**7**


## 7 The Home Page

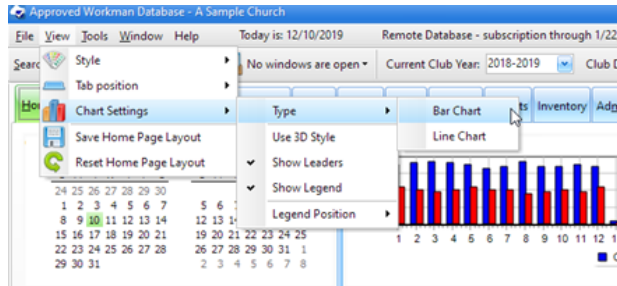
The Home Page is initially selected in the Main Window after logging in. It provides useful summary information for the current club year and current club date. It is divided into panels that can be resized by dragging the splitter that separates them. Once the panels are resized and the preferred layout setup, including which tab to display by default, save the selections by going to the Main Window's Menu bar and choosing **View > Save Home Page Layout**. To return to the original layout, from the Main Window's Menu bar select **View > Reset Home Page Layout**.



- **Calendar** - defaults to the current Club Date / Year. Use the arrows to scroll to the previous or next month(s). The calendar panel can be resized by dragging the splitter at the right side or bottom. The number of months that are shown adjusts depending on the available space.
- **Birthdays** - lists which members have birthdays during the upcoming week.
  -  The date range used in the Birthday section is the current club date through the next scheduled club date. If a week or two is skipped, such as for Christmas break, a two or three week span will be used so birthdays that fall during the break are not missed.
  -  For a printed list of birthdays, use the [Birthday List](#) report in the Report Module.
- **Visitors** - lists visitors on the selected club date, including number of visitors, name of the visitor, who brought the visitor and what club was visited.
- **Club Attendance Chart** - displays attendance totals. Display options are available. See [Customizing the Attendance Chart](#) for more details.
- **Clubber Handbook Alerts** - lists members who completed a handbook on the selected Club Date and those who are close to completing a book. This is a great tool for checking inventory for the next handbooks those clubbers will need and making sure any needed awards/prizes are available.
- **Club Calendar** - provides a summary of each club on each club date. Learn more in [The Club Calendar](#) section. Statistics are displayed in the status bar beneath the Club Calendar, including: Low, High, and Average attendance numbers for clubbers and leaders as well as a Clubber to Leader ratio.
- **Notes** - provides an area to keep notes. Instead of jotting something down on a sticky note, jot it down in the Note tab instead, so that it doesn't get lost!
  -  The same notes are available no matter which Club Year or Date is selected and are not reset during the New Year Setup.
- **What's New** - a list of enhancements and bug fixes for each new version that is released.

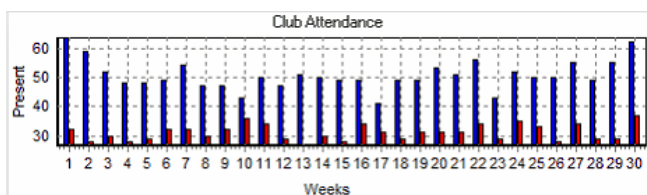
## 7.1 Customizing the Attendance Chart

 There are several options available to customize the Chart on the Home Page. These are available either by selecting **View > Chart Settings** from the Main Window's Menu bar or by right clicking the **Attendance** panel on the Home Page and using the right click pop-up menu.

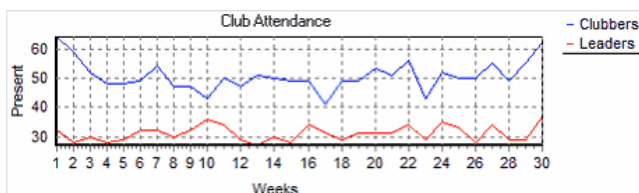


Choose from the following:

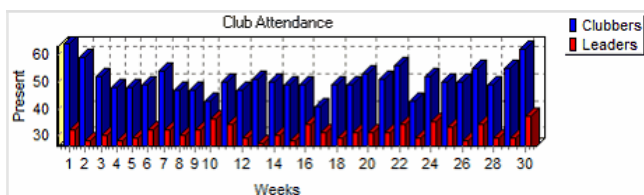
- **Type** - select from:
  - **Bar Chart** (default) -



- **Line Chart**



- **Use 3D Style** - applies to bars or lines within the chart



- **Show Leaders** - hide or show the leader statistics on the chart
- **Show Legend** - hide or show the Legend for Clubber and Leader representation
- **Legend Position** - select from: Top, Bottom, Left or Right

## 7.2 The Club Calendar

The Club Calendar tab includes a summary of each of the clubs on each club date for the Current Club Year. Statistics are displayed in the Status bar beneath the Club Calendar. These include Low, High, and Average attendance numbers for both clubbers and leaders, and also a Clubber to Leader Ratio.

Club Name	Meeting Day	Week	Qtr	Clubbers	Leaders	Visitors	Total Theme
<b>Session Date: 9/26/2018 (9 Clubs, 32 Leaders, Visitors: 57 Total)</b>							
Awana	Wednesday	5 1st		0	7	0	7
Cubbies	Wednesday	5 1st		3	2	0	5
Sparks	Wednesday	5 1st		7	3	0	10
T&T UA	Wednesday	5 1st		8	3	0	11
T&T UC	Wednesday	5 1st		4	3	0	7
Trek	Wednesday	5 1st		6	2	0	8
Journey	Wednesday	5 1st		7	2	0	9

Clubbers: Low 1 High 38 Avg 30      Leaders: Low 17 High 22 Avg 19      Clubbers/Leader: 1.6/1

Preview/Print the grid and/or manipulate it as explained in [working with grids](#). This grid is probably most useful when grouped by the **Date** column, so all of the clubs are grouped together for each club date. This shows the number of Clubbers, Leaders, Visitors, and Sections not only broken down by club, but also totaled in the group's footer.



Using this grid is the easiest way to determine in which Quarter a given club night falls. With the grid grouped by **Date**, expand the row of a given date to see the value in the **Qtr** column for a particular club. (Because different clubs could start and end on different dates, the Quarters could differ per week.)



The records shown in the Club Calendar are read-only. Admin users can edit the records under [Admin > Club Setup > Club Calendars](#). **Themes** and **Notes** can also be added/edited there.


# **Chapter**


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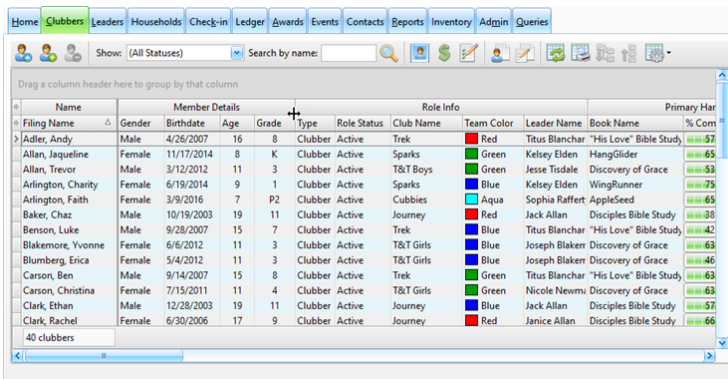
## 8 The Clubbers Module

 The Clubbers Module provides a very flexible high level view of all the clubbers. Initially, the grid displays only clubbers with a Role Status of "Active", but other status values can be selected, such as "Inactive" and "Visitor". The toolbar buttons or right click pop-up menu items provide a wide range of actions such as setting a clubber's Role Status, setting Registration to Current, setting Team Color or Team Name, or Assigning a Leader.







 Only clubbers with a role in the current club year will be displayed. To locate a person without a role, use Search Members in the [Main Toolbar](#) or use the [Households](#) module to locate the family and select the individual.

Ad-hoc reports can be created to analyze club data by using the powerful features of the grid. Records can be [filtered](#), [sorted](#), and [grouped](#). [Hide](#) bands and/or columns and [print](#) or [export](#) the data.

















 Most actions on this grid, including opening member records, opening household ledgers, printing Member Profile reports and printing Registration Forms, can be applied to multiple clubbers (up to 10) at one time using the [multi-select ability](#).








Name		Member Details				Role Info				Primary Har	
Filing Name	Gender	Birthdate	Age	Grade	Type	Role Status	Club Name	Team Color	Leader Name	Book Name	% Com
Adler, Andy	Male	4/26/2007	16	8	Clubber	Active	Trek	Red	Titus Blanchar	"His Love" Bible Study	57
Allan, Jaqueline	Female	11/17/2014	8	K	Clubber	Active	Sparks	Green	Kelsey Elden	HangGlider	65
Allan, Trevor	Male	3/12/2012	11	3	Clubber	Active	T&T Boys	Green	Jesse Tisdale	Discovery of Grace	53
Arlington, Charity	Female	6/19/2014	9	1	Clubber	Active	Sparks	Blue	Kelsey Elden	WingRunner	75
Arlington, Faith	Female	3/9/2016	7	P2	Clubber	Active	Cubbies	Aqua	Sophia Raffert	AppleSeed	65
Baker, Chaz	Male	10/19/2003	19	11	Clubber	Active	Journey	Red	Jack Allan	Disciples Bible Study	58
Benson, Luke	Male	9/28/2007	15	7	Clubber	Active	Trek	Blue	Titus Blanchar	"His Love" Bible Study	42
Blakemore, Yvonne	Female	6/6/2012	11	3	Clubber	Active	T&T Girls	Blue	Joseph Blakem	Discovery of Grace	69
Blumberg, Erica	Female	5/4/2012	11	3	Clubber	Active	T&T Girls	Blue	Joseph Blakem	Discovery of Grace	46
Carson, Ben	Male	9/14/2007	15	8	Clubber	Active	Trek	Green	Titus Blanchar	"His Love" Bible Study	63
Carson, Christina	Female	7/15/2011	11	4	Clubber	Active	T&T Girls	Green	Nicole Newmi	Discovery of Grace	63
Clark, Ethan	Male	12/28/2003	19	11	Clubber	Active	Journey	Blue	Jack Allan	Disciples Bible Study	57
Clark, Rachel	Female	6/30/2006	17	9	Clubber	Active	Journey	Red	Janice Allan	Disciples Bible Study	66

Icon	Action	Description
	<b>Open Member</b>	Opens the selected clubber(s) whose individual data is then displayed in the <a href="#">Member Window</a> . (Pressing the <b>Enter</b> key or double clicking the row also opens the member record.)
	<b>New Member</b> (Ctrl-N)	Opens the <a href="#">Member Window</a> with blank/default values to create a new clubber.
	<b>Delete Member(s)</b> (Ctrl-D)	Removes the currently selected clubber(s). This process requires a confirmation. An option is also given to Archive the Member instead.
	<b>Show</b>	Filters the data in the grid based on Status. Select the boxes in the drop-down list to indicate the status(es) to display.
	<b>Search by Name</b>	Filters the grid to show only the clubbers whose names match the search criteria entered in the text field. (Pressing the Enter key also performs the search/filter.)
	<b>View/Edit Photos</b>	Opens the Photo dialog to <a href="#">manage photos</a> . Defaults to the selected member.
	<b>Open Hh Ledger</b>	Opens the Household Ledger for the selected clubber's family to <a href="#">manage fees and payments</a> .



<b>Icon</b>	<b>Action</b>	<b>Description</b>
	<b>Begin Registration Process</b>	Opens the Registration Window Dialog for the clubber's family to <a href="#">manage registration</a> related events.
	<b>Print Member Profile</b>	Opens the Member Profile report dialog to print a <a href="#">member profile</a> for the selected clubber(s).
	<b>Print Registration Form</b>	Opens the Registration Form report dialog to print a <a href="#">registration form</a> for the selected clubber's family.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.
	<b>Set Flag*</b>	Sets a colored Flag for the selected clubber(s).
	<b>Assign Handbook*</b>	Opens the Assign Handbook dialog to <a href="#">assign a new handbook</a> to the selected clubber(s).
	<b>Open Role Record*</b>	Opens the selected role in the <a href="#">Roles Dialog</a> .
	<b>Set Role Status*</b>	Sets the role status of the selected clubber(s) to one of the following: Active, Archived, Inactive, Prospect, Visitor. The weekly records will also be updated for the current club date and all following weeks.
	<b>Set Role Team Color*</b>	Sets the Team Color for the selected clubber(s). The weekly records will also be updated for the current club date and all following weeks.
	<b>Set Role Team Name*</b>	Sets the Team Name for the selected clubber(s). The weekly records will also be updated for the current club date and all following weeks.
	<b>Set Role Leader Assignment*</b>	Opens a dialog to assign a leader to the selected clubber(s). (The weekly records will also be updated for the current club date and future dates.)
	<b>Assign Uniform*</b>	Opens the Assign Uniform dialog to <a href="#">assign a new uniform</a> to the selected clubber(s).
	<b>Copy Member's Linked E-mail Address*</b>	Copies the <a href="#">linked e-mail address</a> for all selected rows into clipboard memory for pasting into an e-mail client. The addresses are separated by either semicolons or commas as indicated under <a href="#">Admin &gt; Users</a> .  Don't paste e-mail addresses into the usual "To:" field; instead, use the "Bcc" (blind) field so that every recipient doesn't get a list of all addresses.
	<b>Copy Member's Linked Textible Phone Number*</b>	Copies the <a href="#">linked textible phone number</a> (that is then converted to an e-mail address) for all selected rows into clipboard memory for pasting into an e-mail client. The addresses are separated by either semicolons or commas as indicated under <a href="#">Admin &gt; Users</a> .  Don't paste e-mail addresses into the usual "To:" field; instead, use the "Bcc" (blind) field so that every recipient doesn't get a list of all addresses.

<u>Icon</u>	<u>Action</u>	<u>Description</u>
	<b>Copy Household's Primary E-mail Address*</b>	<p>Copies the household's primary email address for all selected rows into clipboard memory for pasting into an e-mail client. The addresses are separated by either semicolons or commas as indicated under <a href="#">Admin &gt; Users</a>.</p> <p> Don't paste e-mail addresses into the usual "To:" field; instead, use the "Bcc" (blind) field so that every recipient doesn't get a list of all addresses.</p>
	<b>Copy Household's Primary Textible Phone Number*</b>	<p>Copies the household's primary phone number (that is then converted to an e-mail address) for all selected rows into clipboard memory for pasting into an e-mail client. The addresses are separated by either semicolons or commas as indicated under <a href="#">Admin &gt; Users</a>.</p> <p> Don't paste e-mail addresses into the usual "To:" field; instead, use the "Bcc" (blind) field so that every recipient doesn't get a list of all addresses.</p>
	<b>Register and Post Payment*</b>	<p>Opens the Register and Post Payment Dialog to <a href="#">mark the Registration as current</a> for the selected clubber(s).</p>


\* These items are not available directly from the toolbar, but are available from the grid's right click pop-up menu.

# **Chapter**

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9

## 9 The Leaders Module

 The Leaders Module provides a flexible high level view of volunteers. Initially the grid displays only leaders with a Status of "Active", but other status values can be selected, such as "Inactive", or "Prospect". The toolbar buttons or right click pop-up menu items provide a wide range of actions such as setting a leader's Role Status, Team Color, or Team Name as well as approving the volunteer for leadership or marking training completed.


Ad-hoc reports can be created to analyze club data by using the powerful features of the grid. Records can be [filtered](#), [sorted](#), and [grouped](#). [Hide](#) bands and/or columns and [print](#) or [export](#) the data.

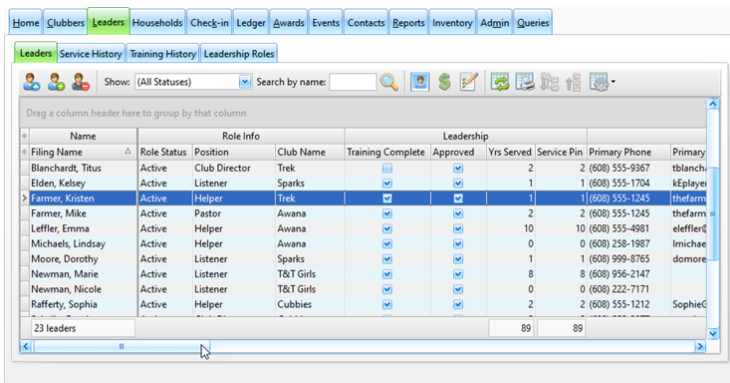
While the Leaders Module works much like the Clubbers Module, there are a few differences. For example, the Leaders Module contains more than one grid, each displaying a different set of leader information such as Service and Training History, as well as Leadership Roles.









Most actions on this grid can be applied to multiple members using the [multi-select ability](#).
















### Leaders




 The **Leaders** page is displayed by default and provides general information about the leaders.



The screenshot shows the 'Leaders' page in the application. At the top, there are navigation tabs: Home, Clubbers, Leaders (selected), Households, Check-in, Ledger, Awards, Events, Contacts, Reports, Inventory, Admin, and Queries. Below the tabs, there are sub-tabs: Leaders, Service History, Training History, and Leadership Roles. A search bar is present with a dropdown for 'Show: (All Statuses)' and a 'Search by name:' field. The main area contains a data grid with columns: Name, Role Status, Position, Role Info, Club Name, Training Complete, Leadership (Approved, Yrs Served, Service Pin), Primary Phone, and Primary. The grid lists several leaders, with 'Farmer, Kristen' selected. At the bottom, it shows '23 leaders' and '89' in two columns.

Icon	Action	Description
	<b>Open Member</b>	Opens the selected leader whose individual data is then displayed in the <a href="#">Member Window</a> . (Pressing the <b>Enter</b> key or double clicking the row also opens the member record.)
	<b>New Member</b> (Ctrl-N)	Opens the <a href="#">Member Window</a> with blank/default values to create a new leader.
	<b>Delete Leader(s)</b> (Ctrl-D)	Removes the currently selected leader(s). This process requires a confirmation.
	<b>Show</b>	Filters the data in the grid based on Status. Select the boxes in the drop-down list to indicate the status(es) of leaders to display.
	<b>Search by Name</b>	Filters the grid to show only the leaders whose names match the search criteria entered in the text field. (Pressing the Enter key also performs the search/filter.)
	<b>View/Edit Photos</b>	Opens the Photo dialog to <a href="#">manage photos</a> . Defaults to the current member.
	<b>Open Household Ledger</b>	Opens the Household Ledger for the selected leader's family to <a href="#">manage fees and payments</a> .

<u>Icon</u>	<u>Action</u>	<u>Description</u>
	<b>Begin Registration Process</b>	Opens the Registration Window Dialog for the clubber's family to <a href="#">manage registration</a> related events.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.
	<b>Set Flag*</b>	Sets a colored Flag for the selected leader(s).
	<b>Open Role Record*</b>	Opens the selected role in the <a href="#">Roles dialog</a> .
	<b>Set Role Status*</b>	Sets the status of the selected leader(s) to one of the following: Active, Archived, Inactive, Prospect, Visitor. The weekly records will also be updated for the current club date and all following weeks.
	<b>Set Role Team Color*</b>	Sets the Team Color for the selected leader(s). The weekly records will also be updated for the current club date and all following weeks.
	<b>Set Role Team Name*</b>	Sets the Team Name for the selected leader(s). The weekly records will also be updated for the current club date and all following weeks.
	<b>Set Training*</b>	Sets "training has been completed" for the selected leader(s) to <b>Completed</b> or <b>Not Completed</b> .
	<b>Set Approved for Leadership*</b>	Sets "approved for leadership" for the selected leaders(s) to <b>Approved</b> or <b>Not Approved</b> .
	<b>Add Leadership Training Record*</b>	Opens a dialog to select an item to add to the Training Record for the selected leader(s).  Manage Leadership Training selections under <a href="#">Admin &gt; System Settings &gt; Generic Lookups</a> .
	<b>Copy Member's Linked E-mail Address*</b>	Copies the <a href="#">linked e-mail address</a> for all selected rows into clipboard memory for pasting into an e-mail client. The addresses are separated by either semicolons or commas as indicated under <a href="#">Admin &gt; Users</a> .  Don't paste e-mail addresses into the "To:" field. Use the "Bcc" (blind) field so that every recipient doesn't get a list of all addresses.
	<b>Copy Member's Linked Textible Phone Number*</b>	Copies the <a href="#">linked textible phone number</a> (that is then converted to an e-mail address) for all selected rows into clipboard memory for pasting into an e-mail client. The addresses are separated by either semicolons or commas as indicated under <a href="#">Admin &gt; Users</a> .  Don't paste e-mail addresses into the "To:" field. Use the "Bcc" (blind) field so that every recipient doesn't get a list of all addresses.
	<b>Copy Household's Primary E-mail Address*</b>	Copies the household's primary email address for all selected rows into clipboard memory for pasting into an e-mail client. The addresses are separated by either semicolons or commas as indicated under <a href="#">Admin &gt; Users</a> .  Don't paste e-mail addresses into the "To:" field. Use the "Bcc" (blind) field so that every recipient doesn't get a list of all addresses.

<u>Icon</u>	<u>Action</u>	<u>Description</u>
	<b>Copy Household's Primary Textible Phone Number*</b>	Copies the household's primary phone number (that is then converted to an e-mail address) for all selected rows into clipboard memory for pasting into an e-mail client. The addresses are separated by either semicolons or commas as indicated under <a href="#">Admin &gt; Users</a> .   Don't paste e-mail addresses into the "To:" field. Use the "Bcc" (blind) field so that every recipient doesn't get a list of all addresses.
	<b>Register and Post Payment*</b>	Opens the Register and Post Payment Dialog to <a href="#">mark the Registration as current</a> for the selected leader(s).

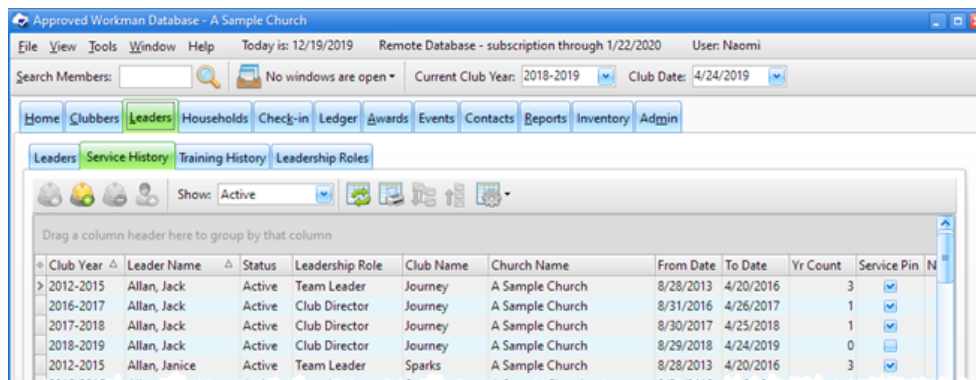
\* These items are not available directly from the toolbar, but are available from the grid's right click pop-up menu.

### Service History



The **Service History** tab displays the service history details of each leader.

- Service History records are created automatically as leaders are created and assigned roles.
- [Enter historical records](#) for leaders to have an accurate count of total years served by using the **New Service** button on the toolbar.
- The most common roles are provided. The list of options can be customized under [Admin > System Settings > Generic Lookups > Roles](#).



Club Year	Leader Name	Status	Leadership Role	Club Name	Church Name	From Date	To Date	Yr Count	Service Pin
2012-2015	Allan, Jack	Active	Team Leader	Journey	A Sample Church	8/28/2013	4/20/2016	3	<input checked="" type="checkbox"/>
2016-2017	Allan, Jack	Active	Club Director	Journey	A Sample Church	8/31/2016	4/26/2017	1	<input checked="" type="checkbox"/>
2017-2018	Allan, Jack	Active	Club Director	Journey	A Sample Church	8/30/2017	4/25/2018	1	<input checked="" type="checkbox"/>
2018-2019	Allan, Jack	Active	Club Director	Journey	A Sample Church	8/29/2018	4/24/2019	0	<input type="checkbox"/>
2012-2015	Allan, Janice	Active	Team Leader	Sparks	A Sample Church	8/28/2013	4/20/2016	3	<input checked="" type="checkbox"/>

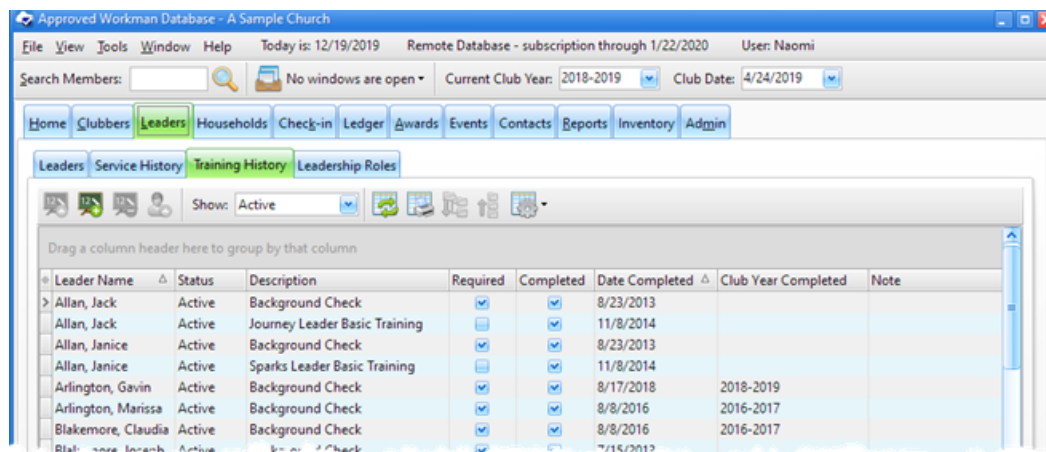
<u>Icon</u>	<u>Action</u>	<u>Description</u>
	<b>Open Service Record</b>	Opens the selected service record in the <a href="#">Service dialog</a> . (Pressing the <b>Enter</b> key or double clicking the row also opens the record.)
	<b>New Service Record (Ctrl-N)</b>	Opens the <a href="#">Service dialog</a> with blank/default values to create a new service record.
	<b>Delete Service Record (Ctrl-D)</b>	Removes the selected service record(s). This process requires a confirmation.
	<b>Open Member</b>	Opens the member record associated with the selected service record.
	<b>Show</b>	Filters the data in the grid based on Status. Select the boxes in the drop-down list to indicate the status(es) of leaders to display.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.






**Training History**

The **Training History** tab displays the training history details of each leader. It is easy to see which leaders have completed (or not completed) the required basic training and background checks.

- Enter Historical records for prior club years using the **New Leader Training** button on the toolbar.
- Some common training descriptions are provided. The list of options can be customized under [Admin > System Settings > Generic Lookups > Leadership Training](#).
- Choose to "**Automatically Add**" selected training items when a leader record is saved. Training items can also be set as **Required**. Set preferences under [Admin > System Settings > Generic Lookups > Leadership Training](#).

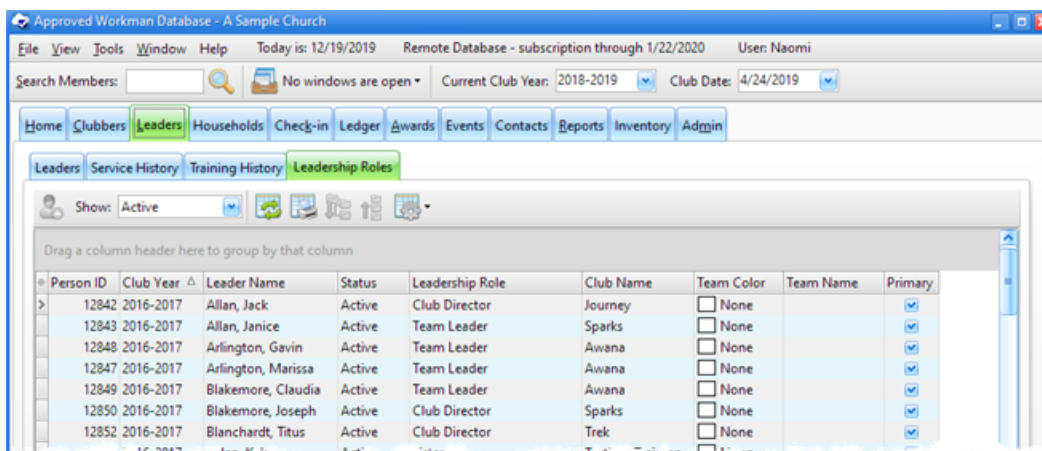
[Customize the grid](#) for ad-hoc reports.





<b>Icon</b>	<b>Action</b>	<b>Description</b>
	<b>Open Training Record</b>	Opens the selected training record in the <a href="#">Training dialog</a> . (Pressing the <b>Enter</b> key or double clicking the row also opens the record.)
	<b>New Training Record (Ctrl-N)</b>	Opens the <a href="#">Training dialog</a> with blank/default values to create a new training record.
	<b>Delete Training Record (Ctrl-D)</b>	Removes the selected training record(s). This process requires a confirmation.
	<b>Open Member</b>	Opens the member record associated with the selected training record.
	<b>Show</b>	Filters the data in the grid based on Status. Select the boxes in the drop-down list to indicate the status(es) of leaders to display.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.

### Leadership Roles

The Leadership Roles tab displays all role records for each leader.



Person ID	Club Year	Leader Name	Status	Leadership Role	Club Name	Team Color	Team Name	Primary
12842	2016-2017	Allan, Jack	Active	Club Director	Journey	<input type="checkbox"/> None		<input checked="" type="checkbox"/>
12843	2016-2017	Allan, Janice	Active	Team Leader	Sparks	<input type="checkbox"/> None		<input checked="" type="checkbox"/>
12848	2016-2017	Arlington, Gavin	Active	Team Leader	Awana	<input type="checkbox"/> None		<input checked="" type="checkbox"/>
12847	2016-2017	Arlington, Marissa	Active	Team Leader	Awana	<input type="checkbox"/> None		<input checked="" type="checkbox"/>
12849	2016-2017	Blakemore, Claudia	Active	Team Leader	Awana	<input type="checkbox"/> None		<input checked="" type="checkbox"/>
12850	2016-2017	Blakemore, Joseph	Active	Club Director	Sparks	<input type="checkbox"/> None		<input checked="" type="checkbox"/>
12852	2016-2017	Blanchardt, Titus	Active	Club Director	Trek	<input type="checkbox"/> None		<input checked="" type="checkbox"/>

<b>Icon</b>	<b>Action</b>	<b>Description</b>
	<b>Open Member</b>	Opens the member record associated with the selected role record.
	<b>Show</b>	Filters the data in the grid based on Status. Select the boxes in the drop-down list to indicate the status(es) of leaders to display.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.

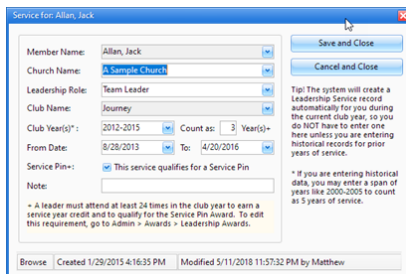


## 9.1 The Service Dialog

 Opening or creating a service record opens the Service dialog to view, modify or enter details of a leader's service history.

 [Service history records](#) are created automatically for current roles.

 To speed the process of entering past **service history**, instead of selecting a specific club year from the drop-down list, type in a span of club years such as "2010-2018" to represent 8 years of service.



Service for Allan, Jack

Member Name: Allan, Jack

Church Name: Sample Church

Leadership Role: Team Leader

Club Name: Journey

Club Year(s): 2012-2015 Count as: 3 Year(s)

From Date: 8/28/2013 To: 4/20/2016

Service Pin:  This service qualifies for a Service Pin

Note:


- A leader must attend at least 24 times in the club year to earn a service year credit and to qualify for the Service Pin Award. To edit this requirement, go to Admin > Awards > Leadership Awards.

Tip: The system will create a Leadership Service record automatically for you during the current club year, so you do NOT have to enter one here unless you are entering historical records for prior years of service.

\* If you are entering historical data, you may enter a span of years like 2000-2005 to count as 5 years of service.

Browse | Created 1/29/2015 4:16:35 PM | Modified 5/11/2018 11:57:32 PM by Matthew

- **Member Name** - the leader who served
- **Church Name** - where the service was completed. Use **<New>** to add additional entries.
- **Leadership Role** - selection options are determined by [Admin > System Settings > Generic Lookups > Roles](#).
- **Club Name** - if the actual club name the leader served in is not listed, the generic "Awana" club may be used and a note added to the record with the specific club name.
- **Club Years** - a range of years may be entered. Examine **Count as # Year(s)** to be sure it is calculated correctly.
- **From Date - To Date** - specific dates (optional).
- **Service Pin** - indicates if **This service qualifies for a Service Pin**.


 Each time attendance is recorded for a leader, the database checks the attendance criteria ([Admin > System Settings > Awards > Leadership Service Awards](#)). When the criteria is met, the Service record is updated.

- **Note** - any additional information related to the service record.

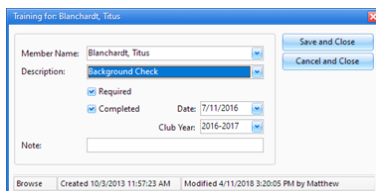
### Actions

- **Save and Close** - saves the record and closes the dialog.
- **Cancel and Close** - exits without creating a new record or saving changes to an existing one.

## 9.2 The Training Dialog

 Opening or creating a new training record opens the Training dialog to view, modify or enter details of a leader's training history.

 [Training history records](#) can be created automatically.



Training for Blanchard, Titus

Member Name: Blanchard, Titus

Description: Background Check

Required

Completed Date: 7/11/2016

Club Year: 2016-2017

Note:

Browse | Created 10/3/2013 11:57:23 AM | Modified 4/11/2018 3:20:05 PM by Matthew

- **Member Name** - the leader who received training

- **Description** - selection options are determined by records under [Admin > System Settings > Generic Lookups > Leadership Training](#)
- **Required** - indicates if a leader must have the training
- **Completed** - indicates if the leader has finished the training
- **Date Completed** - when **Completed** is checked, the **Date** field is enabled. Examine the **Club Year** to be sure it is correct.
- **Note** - any additional information related to the training record

#### Actions


- **Save and Close** - saves the record and closes the dialog.
- **Cancel and Close** - exits without creating a new record or saving changes to an existing one.

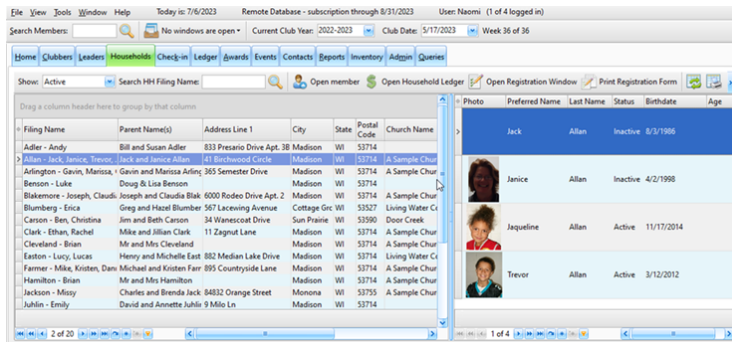
# **Chapter**







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**10**

## 10 The Households Module

 The Households Module provides a main grid with a view of all households and a smaller grid on the right with details for the individuals in each household.



Icon	Action	Description
	<b>Show</b>	Filters the data in the grid based on Status. Select the boxes in the drop-down list to indicate the status(es) of households to display.
	<b>Search HH Filing Name</b>	Filters the grid to show only households whose names match the criteria entered in the text field. (Pressing the Enter key also performs the search.)
	<b>Open Member</b>	When a member is selected in the individual section, opens the member in the <a href="#">Member Window</a> .
	<b>Open Household Ledger</b>	Opens the Household Ledger for the selected family to <a href="#">manage fees and payments</a> .
	<b>Open Registration Window</b>	Opens the Registration Window Dialog for the selected family to <a href="#">manage registration</a> related events.
	<b>Print Registration Form</b>	Opens the Registration Form report dialog to print a <a href="#">registration form</a> for the selected clubber's family.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.



Many of the actions are also available through the right click pop-up menu.



The right click pop-up menu provides an option to "Rederive the Household Filing Name". It is derived from the **Last Name** followed by a dash and a list of all **Preferred Names** in the household. Example: "Green - Sandy, Michael, Tina". In households that have persons with different last names, the last names are listed in alphabetical order, separated by "/". For example, for Rebecca Brown, Chad Smith and David Smith: "Brown/Smith - Rebecca, Chad, David".

# **Chapter**

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**11**

## 11 The Check-in Module

✓ The Check-in Module provides a way to quickly and easily track Attendance, Dues, Offerings, and other categories such as Uniform, Bible, Book, and Bonus, as well as add Visitors and mark completed Handbook sections. With each click, the section counts and point totals are updated and awards are automatically triggered. The Check-in module efficiently handles the weekly recordkeeping tasks that would otherwise be a very tedious and time consuming job.

Details on the Check-in Module are divided into four sections: [The Toolbar](#), [The Attendance Grid](#), [The Handbooks Grid](#), and [The Totals Grid](#).


Filing Name	Grade	Club Name	Team Color	Attend					Dues		Misc Points			
				Club	Uniform	Bible	Book	Bonus	Visitors	Dues Pd	Amt Pd	Game Pts	Other Pts	Spent Pts
Adler, Andy	8	Trek	Red	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Allan, Jacqueline	K	Sparks	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.50	0	0	0
Allan, Trevor	3	T&T Boys	Green	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.50	0	0	0
Arlington, Charity	1	Sparks	Blue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.50	0	0	0
Arlington, Faith	P2	Cubbies	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Baker, Chaz	11	Journey	Red	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Blakemore, Yvonne	3	T&T Girls	Blue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Blumberg, Erica	3	T&T Girls	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.50	0	0	0
Carson, Ben	8	Trek	Green	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Carson, Christina	4	T&T Girls	Green	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Clark, Ethan	11	Journey	Blue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Clark, Rachel	9	Journey	Red	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Cleveland, Brian	P1	Cubbies	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Colson, Ryan	2	Sparks	Green	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.50	0	0	0
Delemater, Deana	4	T&T Girls	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.00	0	0	0
Douglas, Janetta	12	Journey	Green	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.50	0	0	0
Easton, Lucas	5	T&T Boys	Green	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	\$0.50	0	0	0

### Customizing the Check-in Grid


The Check-in grid can be customized to meet different needs of Awana Programs and maximize productivity.

#### One-time customizations:

1. Start by [showing or hiding the columns](#) based on what is used. For example, if Church Attendance is not tracked, hide the "**Attend Church**" column header. If weekly Dues payments aren't tracked, hide the "**Dues**" header band so all dues-related columns are hidden.

 When choosing to hide columns, be sure to understand the difference between a **header band** and a **column header**. In the above graphic, one header band is labeled **Other Items**. Beneath this header band are column headers for **Uniform**, **Bible**, **Book**, etc. Hiding a header band causes all its column headers to also be hidden.


2. To use the **Custom1** and **Custom2** check box columns, set the point values and customize the Display Names under [Admin > Club Setup > Club Names, Logos, Dues and Points](#).
3. Resize column widths by dragging a column header or a header band's right edge to the left or right. For example, if the **Church Attendance** column is hidden, the **Attend** header band can be resized so it is more narrow.
4. Save the custom settings! After making adjustments, click the [Grid](#) button in the toolbar and select **Save the current grid layout** to ensure the grid is set-up the same way after the next log in.

 The customized grid settings are saved per user. Each user can (and should) set preferred grid layouts. Each person using the database should have an individual [User Account](#) with a unique name and password.


#### Weekly customizations:

Additional customizations can be made each week to accomplish specific tasks. Here are some examples:

1. When entering data from worksheets that are organized by Club Name, use the toolbar's **Show:** club name drop-down check list to limit records to one club at a time. For example: To record attendance and handbook sections only for Sparks clubbers, select "Clubbers" and "Sparks" in the **Show:** drop-down lists. Once data entry for Sparks is completed, select another club name, like T&T, to continue data entry for the next group.

 If you always limit the records displayed to a single club, hide the Club Name column to reduce horizontal scrolling.

2. When entering data from worksheets that are organized by Team Color for a single Club, after selecting the specific club to Show, [group the records](#) by Team Color.

 Grouping by Team Color makes it easy to enter Game Points (if those are tracked). Also, statistics are shown for each node (in this case, each Team Color).











3. When entering data from worksheets for handbook section completion, [filter the grid](#) to show a selected Primary Handbook (like Grace in Action, or Appleseed). Further filter the grid to show those who attended on the given club date (Attend = true). This makes it it easy to [multi-select records](#) and mark the same handbook section for all members at once.














When the specific task is completed, use the [Grid](#) button's **Reset Grid Layout** to return to your custom grid settings.

## 11.1 The Toolbar

The toolbar in the Check-in Module provides functionality that is generally needed during check-in time.



<b>Icon</b>	<b>Action</b>	<b>Description</b>
	<b>Open Member</b>	Opens the selected member whose individual data is then displayed in the <a href="#">Member Window</a> . (Pressing the <b>Enter</b> key or double clicking the row also opens the member record.)
	<b>New Member</b> (Ctrl-N)	Opens the Add Member dialog with blank/default values to <a href="#">create a new member</a> .
	<b>Add a Visitor</b>	Opens the Add a Visitor dialog to <a href="#">add a visitor</a> brought by the selected member.
	<b>Perform Search</b>	Filters the grid to show only those members whose names match the search criteria entered in the text field. (Pressing the <b>Enter</b> key also performs the search/filter.)
	<b>Speed Check</b>	This is a toggle button that can be turned on or off. When on, other check boxes are automatically selected when a member's Club Attendance is marked. Set preferences under <a href="#">Admin &gt; System Settings &gt; Options &gt; Check-In</a> .
	<b>Assign Handbook</b>	Opens the Assign Handbook dialog to <a href="#">assign a new handbook</a> to the selected member(s).
	<b>Assign Uniform</b>	Opens the Assign Uniform dialog to <a href="#">assign a new uniform</a> to the selected member(s).
	<b>Open Household Ledger</b>	Opens the Household Ledger for the selected member's family to <a href="#">manage fees and payments</a> .
	<b>Begin Registration Process</b>	Opens the Registration Window Dialog for the member's family to <a href="#">manage registration</a> related events.
	<b>Print Member Profile</b>	Opens the Member Profile report dialog to print a <a href="#">member profile</a> for the current member.

	<b>Print Registration Form</b>	Opens the Registration Form report dialog to print a <a href="#">registration form</a> for the selected member's family.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.
	<b>Show/Hide Handbook Sections</b>	This is a toggle button that can be turned on or off to show the Handbook Sections grid next to the Attendance grid. (Re-size the panel by grabbing and dragging the edge.) Note: this is the same grid that is used in the Handbooks tab.
	<b>Show</b>	Filters the data in the grid based on Status, Member Type and/or Club Name. Select the boxes in each of the drop-down lists to indicate the status(es), member type(s) and/or club(s) to be displayed in the grid.
	<b>Theme</b>	Displays the theme if a particular Theme is set in the club session records for the current club date (under <a href="#">Admin &gt; Club Setup &gt; Club Calendars.</a> )
	<b>Set Flag*</b>	Sets a colored Flag for the selected member(s).
	<b>Set Attendance*</b>	<b>Present</b> - marks the attendance check box for the selected member(s). <b>Not present</b> - clears the attendance check box for the selected member(s).  Use this with the <a href="#">multi-select ability</a> of the grid to quickly mark (or clear) attendance for multiple members at one time.
	<b>Excuse*</b>	Marks the club and/or church attendance for the selected member, or all members, as excused. If a club night is canceled, the date can be deleted (under <a href="#">Admin &gt; Club Setup &gt; Club Calendars</a> ) instead.
	<b>Clear excused*</b>	Sets the club and/or church attendance for the selected member, or all members, as not excused.
	<b>Clear all Team Colors for this week*</b>	Clears all the Team Color values in preparation to reassign new ones. When using Team Colors to group clubbers only for games (and not handbook time), this helps keep track of who has/has not been re-assigned.
	<b>Reset all Team Colors for this week*</b>	Resets all current Team Color values according to each member's base color (from the Member's <a href="#">Role</a> record.)
	<b>Open Role Record*</b>	Opens the <a href="#">Roles dialog</a> for the selected role.
	<b>Set Role Status*</b>	Sets the role status of the selected member(s) to one of the following: Active, Archived, Inactive, Prospect, Visitor. The weekly records will also be updated for the current club date and all following weeks.
	<b>Set Role Team Color*</b>	Sets the Team Color in the Role record for the selected clubber(s). The weekly records will also be updated for the current club date and all following weeks.
	<b>Set Role Team Name*</b>	Sets the Team Name for the selected member(s). The weekly records will also be updated for the current club date and all following weeks.
	<b>Set Role Leader Assignment*</b>	Opens a dialog to assign a leader to the selected clubber(s). The weekly records will also be updated for the current club date and future dates.

\* These items are not directly available from the toolbar, but are available from the grid's right click pop-up menu.



## 11.2 The Attendance Grid

Use the Check-in grid to perform data entry tasks related to tracking Check-in items such as: **Club** and **Church Attendance, Dues Pd, Offering Amount, Uniform, Bible, Book, Bonus, Visitors, Game Points**, etc. Most columns are check boxes for quick and easy data entry. Some columns, like **Game Points** and **Other**, allow numeric values to be typed directly in the grid.

Filing Name	Club Name	Team Color	Attend			Other Items							
			Club	Church	Uniform	Bible	Book	Bonus	Visitors	Shoes	On Time	Game Pts	Other Pts
Adler, Andy	Trek	Red	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	0	0
Allan, Jaqueline	Sparks	Green	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	0	0
Allan, Trevor	T&T Boys	Green	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	0	0
Arlington, Charity	Sparks	Blue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	0	0
Arlington, Faith	Cubbies	Aqua	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	0	0
Baker, Chaz	Journey	Red	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	0	0
Blakemore, Yvonne	T&T Girls	Blue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	0	0
Blumberg, Enca	T&T Girls	Blue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	0	0

### Key Points

- Remember to [customize the grid](#) as desired.
- Use the **Show:** components in the toolbar to get a custom view for a specific data entry task. For example, set the grid to show only Active clubbers in Sparks.
- Use the incremental search capability to quickly locate a specific clubber.
- Turn on the **Speed Check** feature to avoid repeating clicks for **Uniform, Bible, and Book**, so those columns are automatically checked when the **Attend Club** box is checked. Select settings under [Admin > System Settings > Options > Check-In](#).
- Mark (or clear) attendance for multiple members at once by [multi-selecting records](#) and using the right click pop-up menu option of **Set Attendance > Present/Not present**.
- Click in the **Game Points** cell and type the numeric value to enter points earned for Game Time.
  - To award points to everyone with a specific Team Color, [group](#) by Team Color and [filter](#) the attend column to show only those who attended. For each color group, enter points in the **Game Points** cell for the first person, then press the down arrow and enter the next one. Continue until all entries are completed.
- Change the **Team Color** assignment by clicking the cell and selecting a different color.
  - A change in Team Color directly in the cell applies only to the current week. To change the Team Color for all future weeks, use the right click pop-up menu item to "Set Role Team Color". Prior weeks are not changed to preserve historical data. To change the Team Color for a prior week, first adjust the Current Club Date in the main toolbar or open the Member record and change the color on the Attendance tab for the desired week.
- Excuse an absence by selecting a clubber/s and using the right click popup menu's **Excuse >** option.
- View valuable statistics by [grouping](#) on Team Color, Team Name, or Leader Name. Drag a column header into the grouping area above the grid. Statistics are shown for each node: **Number Present, Total Points, Average Points Per Clubber, Total Required Sections completed, and Average Number of Sections per Clubber**.
- Create ad-hoc reports using the [Preview/Print](#) feature.

### Dues and Posting payments

- [Hide](#) the **Dues** header band if weekly dues payments are not collected.
- If weekly dues payments are collected, click the **Dues Pd** check box when a single weekly dues amount is received. If weekly dues are \$0.50 but a clubber pays \$1.00 or more, type over the default **Dues Amt Pd** to change the received amount.

- Any amount entered in the **Dues Amount Pd** cell is assumed to be cash and is applied exclusively to the dues for the selected clubber. If money is paid for more than one clubber's dues, divide up the amount and apply it to each clubber separately.
- For money received for books and uniforms, do NOT check the **Dues Pd** check box or type a value in the **Dues Amt Pd** field. Instead, open the [Household Ledger](#) and post the payment there.



A quick way to open the Household Ledger is to use the money sign button in the toolbar.

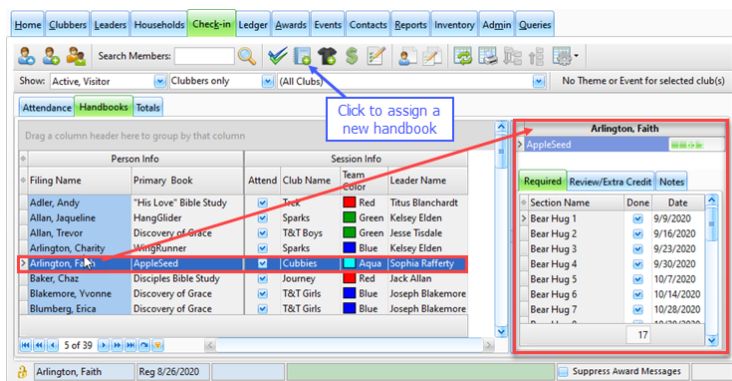
### 11.3 The Handbooks Section Grid

The Check-in module's Handbooks Section Grid is one of two ways to record completed handbook sections. It is useful for marking sections complete during club since it is faster than opening each member's record and marking sections completed on the Handbook page.

Select a row in the main grid. The member's Sections Completed grid is displayed on the right side of the screen.



For quicker data entry for clubs that all work on the same section, like Cubbies or T&T, [select multiple members](#) that all completed the same section and then mark the section completed. All of the selected members' handbooks will be updated. [Showing](#) the Primary Handbook in the grid for each member and [filtering](#) or [grouping](#) the grid will help with selection.



- **Member name, current handbook(s), handbook percentage completed** - displayed above the handbook section grid. If there is more than one handbook, select which handbook to show.
  - If the correct handbook is not displayed, open the Member record. Under the [Handbooks tab](#), mark an already assigned book as "Current" or [Assign a new handbook](#).
- **Required** tab - sections a clubber must complete to earn a book award.
  - The Sections Completed grid automatically scrolls to display the incomplete sections.
  - Mark the **Done** check box to indicate a section has been completed. The current club date is used as the **Date** of completion, but can be changed.
    - For the clubber to be credited properly and weekly statistics to be accurate, be sure to select a valid club date.
  - Clear the **Done** check box to remove a completed section. Related awards will also be removed.
  - An [Award Message dialog](#) opens when an award is earned by completion of a section. Select whether or not the Award was **Received** then click **OK**. (Set a default for **Award was Received** under [Admin > System Settings > Options > Misc.](#))
- **Review/Extra Credit** tab - additional sections that a clubber can complete. This grid operates like the required sections grid.
- **Notes** - any additional information related to the assigned handbook for this member.

## 11.4 The Totals Grid

The Check-in module's Totals Grid provides valuable data about your members and your club on the current club date.

Statistics are provided in the following ways:

- **Individual records** - totals for each person:

**Subtotal**, points: from completed sections from general categories (Attendance, Dues, Offering and Misc) and amount spent

**Total**, number of: completed sections, club date points, and net points

- **Grid footers** - totals for entire club:

**Attendance**, number who: attended Club, had Club attendance excused, attended Church, had Church attendance excused

**Dues**: number who paid, total Amount Paid

**Offering**: number who donated, total amount donated

**Misc.**, number who met the requirement for: Uniform, Bible, Handbook, Bonus, Custom 1, Custom 2, and Visitors; totals for Game and Other points

**Sections**, points from sections and general categories (Attendance, Dues, Offering and Misc) as well as points spent

**Total**: number of completed sections, amount of club date points

- **Group summaries** - totals for each group:

Number present, total points, average points, total sections, average sections

- **Group footers** - totals for each group:

**Attendance**, number who attended Club, attended Church

**Dues**: number who paid, total Amount Paid

**Offering**: total amount donated

**Misc**, number who met the requirement for: Uniform, Bible, Handbook, Bonus, and Visitors; totals for Game and Other points

**Sections**, number of completed: Required Sections and total points from those sections; Extra Credit sections and points from those sections

**Total**: number of completed sections, amount of club date points

# **Chapter**

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**12**

## 12 The Ledger Module

Dealing with fee and payment transactions can be a cumbersome and confusing job. The Ledger Module eases that burden by providing a way to track all fees and payments. It provides a big picture view for the entire club's finances as well as a detailed view of each individual or household's financial records. The [Household Account Statement](#) report can be used as an invoice to keep families informed of purchases and balances. The [Receipts Report](#) can provide a detailed accounting of monies received for the church treasurer.

The Ledger Module includes tabs for [Fees](#) and [Payments](#) as well as access to a selected member's [Household Ledger](#). For an overview, see [Working with the Ledger](#).







Most actions on these grids, including marking items as received or not received, can be applied to multiple rows at once using the [multi-select ability](#).

### 12.1 Fees




The **Ledger > Fees** tab shows fees for all households in the database. It shows at a glance the money received on a particular date (or for the entire year) and also how much money is still due. The grid can be [filtered](#) by **Item Rcvd** to see which members still need to receive a book or uniform that was ordered. This grid can also help monitor a budget. As an example, if scholarships are provided, [apply a filter](#) to show **Dues?** = False and **Waived** = true to show how much the church spent for books and uniforms of scholarship kids. (The payment type of "Waived" is used to indicate that a particular Fee was paid by the club, often through the use of Scholarship funds.)

Icon	Action	Description
	<b>Open Fee</b>	Opens the selected fee in the <a href="#">Fee dialog</a> . (Pressing the <b>Enter</b> key with a row selected or double clicking the row also opens the fee.)
	<b>New Fee (Ctrl-N)</b>	Opens the <a href="#">Fee dialog</a> with blank/default values to create a new fee.
	<b>Delete Fee(s) (Ctrl-D)</b>	Removes the selected fee(s).
	<b>Open Member</b>	Opens the member record for the person who incurred the selected fee.
	<b>Show</b>	Filters the data in the grid. Choose to show <b>All Fees</b> , <b>Paid Fees</b> , or <b>Unpaid Fees</b> . <b>Show In Year:</b> limits records to fees in the selected club year.
	<b>Waive Fee(s)</b>	Waives any balance on the selected Fee(s). This creates a payment record of type "Waived" and lists your club name as the Payor.
	<b>Open Household</b>	Opens the Household Ledger for the selected member's family to <a href="#">manage fees and payments</a> .


<u>Icon</u>	<u>Action</u>	<u>Description</u>
	<b>Ledger</b>	
	<b>Hh Account Statement</b>	Opens the <a href="#">Household Account Statement</a> report dialog. The selection criteria defaults to the selected member's household.
	<b>Rcvd</b>	Marks the selected fee item(s) as having been received by the member. When marking items as " <b>Received</b> ", set <b>Date Received to:</b> defaults to the current club date. When working with items received on a different date, change the date before clicking the <b>Rcvd</b> button.
	<b>Not Rcvd</b>	Marks the selected fee item(s) as <i>not</i> having been received by the member yet.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.

### 12.1.1 The Fee Dialog


Opening or creating a fee displays the Fee dialog to view, modify, or enter the details of a fee.


- **Member Name** - member who incurred the fee
- **Item Number** and **Item Description** - selection can be done using either field. The lists are populated with items marked to be used in Fee lists in the [Inventory record](#). When one is selected, the other field is filled in automatically. Images from the Inventory record are shown.
  -  The **Search** button opens the [Inventory Quick Reference](#) to help select the correct item.
  -  If an item isn't listed, but it IS in the main Inventory List, open the item from the [Inventory Module](#). Click the **Club Usage** tab. Ensure **Use this item as a choice in any...** drop-down list is selected.
  -  For new book or uniform fees, an option to assign the book or uniform will be given.
- **Received** - selecting **Yes** enables the **Date Rcvd** field. Verify the **Club Year** is correct.
- **Amount** - money a member will pay for the item. It is initially set by the item's **Sell Price** in the Inventory records, but can be edited. To update the **Sell Price** so future Fees are correct, use the **Item Number** link in the lower right to open the Inventory Item.
- **Due Date** - when the fee should be paid by the member
- **Note** - any additional information related to this fee
- **Total Paid** and **Balance** - read-only fields; calculated based on payment(s) applied to the fee

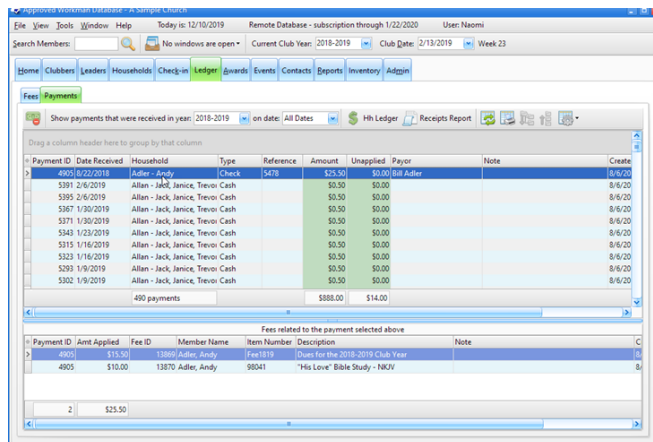
## Actions






- **Save and Close** - saves the record and closes the dialog.
  -  Click **Save and New** to save the fee then clear the fields of the dialog to quickly create another fee.
- **Cancel and Close** - exits without creating a new record or saving changes to an existing one.
- **Household Ledger** - opens the Household Ledger for the member who incurred the fee. The Fee dialog automatically saves and closes, then the [Household Ledger](#) opens.

## 12.2 Payments


 The **Ledger > Payments** tab shows payments for all households. It defaults to payments received on the current Club Date. A different date can be selected or choose "All Dates". When a record is selected, the grid at the bottom shows all the fees to which the payment was applied.

 **Grouping** records will show item counts and subtotals. Example: group by **Type** for a count of cash payments, checks, and waived payments. The grand total is also listed in the grid footer.



<u>Icon</u>	<u>Action</u>	<u>Description</u>
	<b>Delete Payment</b>	Removes the selected payment(s). A confirmation is required.
	<b>Show</b>	Filters the data in the grid based on <b>Club Year</b> and <b>Club Date</b> . The Club Year defaults to the current club year, but can be changed. Select a specific club date within that year or choose to show <b>All Dates</b> .
	<b>Open Household Ledger</b>	Opens the Household Ledger for the selected member's family to <a href="#">manage fees and payments</a> .
	<b>Receipts Report</b>	Opens the Receipts Report dialog to set parameters for <a href="#">a report listing payments</a> grouped by <b>Date Received</b> and <b>Type</b> .
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.

## 12.3 The Household Ledger

 The Household Ledger displays the fees and payments for all members of a specific household. This makes it easy to see the bottom-line total a family owes. It also provides details for any fee and the payments applied to it. Conversely, it shows payment records and fees to which they were applied.

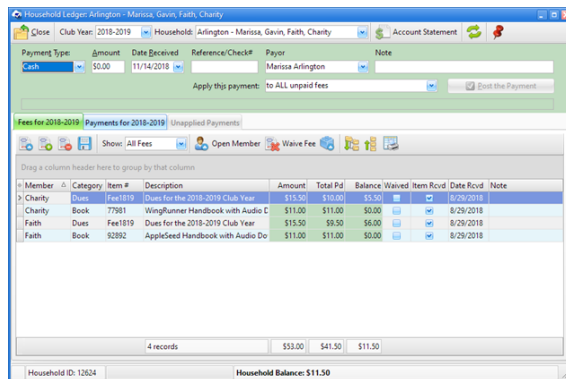
Open a selected member's Household Ledger from the:







- [Check-in](#), [Clubbers](#), or [Leaders](#) modules: button on the toolbar or right click pop-up menu item
- [Households](#), or [Ledger](#) module toolbar: **Household Ledger** button
- [Member Window toolbar](#): **Household Ledger** button
- [Fee Dialog](#): **Household Ledger** button

Use the top section of the Household Ledger to post payments. The lower section contains three tabs: **Fees**, **Payments**, and **Unapplied Payments**. See the **Fees** and **Payments** topics below for details.



Use the **Club Year** drop-down list to filter the information in all three tabs based on club year.









<u>Icon</u>	<u>Action</u>	<u>Description</u>
	<b>Close</b>	Closes the window.
	<b>Show Club Year</b>	Filters the items in the ledger based on <b>Club Year</b> . Defaults to the current club year, but can be changed.
	<b>Show Household</b>	Filters the items in the ledger based on the selected Household. To change, select a different household from the drop-down list.
	<b>Account Statement</b>	Opens the <a href="#">Household Account Statement</a> report dialog. The selection criteria defaults to the selected household.
	<b>Refresh</b>	Refreshes the data in the grid. If there is a concern about viewing the latest data, simply click this button.
	<b>Stay On Top</b>	Toggles whether or not the window will stay on top of the main window.

### Fees

Create a fee for any item requiring payment. Some fees (for dues, handbooks, and uniforms) can be automatically created by the database. Other fees, like handbags, need to be created manually. View a list of all fees by clicking the **Fees for [club year]** tab.



**Fees Toolbar:**

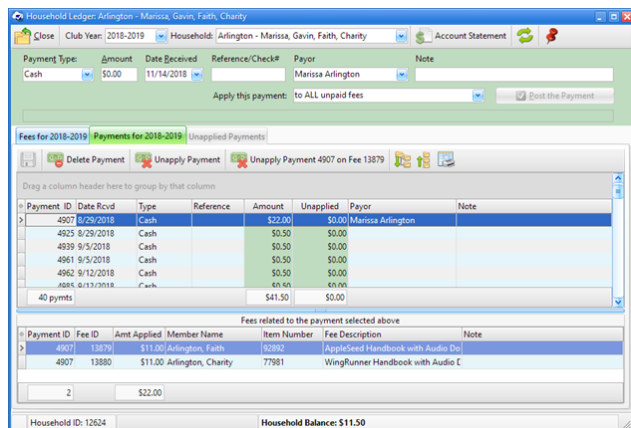
<u>Icon</u>	<u>Action</u>	<u>Description</u>
	<b>Open Fee</b>	Opens the selected fee in the <a href="#">Fee dialog</a> . (Pressing the <b>Enter</b> key with a row selected or double clicking the row also opens the fee.)
	<b>New Fee</b>	Opens the <a href="#">Fee dialog</a> with blank/default values to create a new fee for this member.
	<b>Delete Fee</b>	Removes the selected fee. This process requires a confirmation.
	<b>Show</b>	Filters the data in the grid. Choose to show <b>All Fees, Paid Fees, or Unpaid Fees.</b>
	<b>Open Member</b>	Opens the selected member whose individual data is then displayed in the <a href="#">Member Window</a> .
	<b>Waive Fee(s)</b>	Waives any balance on the selected Fee(s). This creates a payment record of type "Waived" and lists your club name as the Payor.
	<b>Open Inv Item</b>	Opens the selected item in the <a href="#">Inventory Item window</a> . (Pressing the <b>Enter</b> key with a row selected or double clicking the row also opens the inventory item.)



Manipulate the grid as explained in [working with grids](#).

**Payments**

When members make payments, keep track of who paid and for what. Use the top section of the Household Ledger to post payments. Fee records are not required before posting a payment. Payments not applied to a fee are tracked as "Unapplied" and can be applied later when fees are created. This is common at the beginning of a club year when payments might be made before fees are created. When a record is selected, the grid at the bottom shows all the fees to which the payment was applied.



The screenshot shows the Household Ledger software interface. At the top, there's a window title bar and a menu bar. Below that, there's a form for entering payment information. The form includes fields for Payment Type (Cash), Amount (\$0.00), Date Received (11/14/2018), Reference/Check#, Payor (Marissa Arlington), and Note. There are also buttons for 'Apply this payment: to ALL unpaid fees' and 'Post the Payment'. Below the form, there's a section for 'Fees for 2018-2019' with a sub-section for 'Unapplied Payments'. A grid displays a list of fees with columns for Payment ID, Date Rcvd, Type, Reference, Amount, Unapplied, Payor, and Note. The grid shows several rows of fees, with the first row selected. Below the grid, there's a section for 'Fees related to the payment selected above' which shows a list of fees with columns for Payment ID, Fee ID, Amt Applied, Member Name, Item Number, Fee Description, and Note. The grid shows two rows of fees, with the first row selected. At the bottom of the window, there's a status bar showing 'Household ID: 12624' and 'Household Balance: \$11.50'.

**Posting a Payment**


1. Enter the following information in the top portion of the Household Ledger window:

- **Payment Type** - **Cash, Check, Credit Card, Debit Card, Discount, Money Order, Online, Other, Waived**



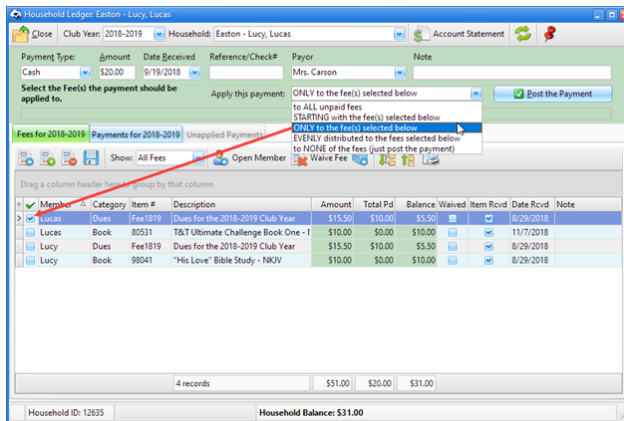
Waive a fee by applying a payment to a fee and setting its **Payment Type** to **Waived**.

- **Amount** - total money paid

- **Date Received** - defaults to the current date
- **Reference** - any information useful in referencing the payment; for example, a Check #.
- **Payor** - person making the payment
  -  Payors in each household are remembered and displayed in the drop-down list.
- **Note** - any additional information related to the payment

2. Select how to Apply the payment. Choose one of the following:

- **to ALL unpaid fees** - the Windows App logically considers all unpaid fees, applying payment to non-dues fees first, then to other fees until the money is spent.
- **STARTING with the fee(s) selected below** - on the **Fees for [club year]** tab, select at least one fee for the payment to cover. If there is money remaining after the selection(s), the logic above is used.
- **ONLY to the fee(s) selected below** - on the **Fees for [club year]** tab, check the box to select a fee



- **EVENLY distributed to the fees selected below** - on the **Fees for [club year]** tab, select the fees to which the payment will be distributed.







The amount to be applied to each fee is shown in the top section under the payment type field.

- **to NONE of the fees (just post the payment)** - an Unapplied Payment is created for the entire amount.

3. Click **Post the Payment**. **Total Paid** and **Balance** at the bottom of the Fees grid are adjusted. The payment is added to the **Payments** grid. Any remaining money is added to the **Unapplied Payment** grid.

#### Payments Toolbar:

<u>Icon</u>	<u>Action</u>	<u>Description</u>
	<b>Save</b>	Saves changes made to payment details. The following payment details can be edited directly in the grid: <b>Date Rcvd, [Payment] Type, Reference, Payor, Note</b>
	<b>Delete Payment</b>	Removes the selected payment(s). A confirmation is required.
	<b>Unapply Payment</b>	Removes the association(s) of the payment to all fees.
	<b>Unapply Payment on selected Fee</b>	Enabled if a single fee is selected. Removes the association of the payment to only the selected fee instead of all of the fees.

## Unapplied Payments

The **Unapplied Payments** tab displays any payments (or parts of payments) not applied to a specific fee. This could occur if a member pays more than the fee amount or pays for future fees.

To apply an unapplied payment to an existing fee:

1. Select the unapplied payment to be applied.
2. Click **Use the payment amount**. The payment information is entered in the top portion of the window. Continue as explained for [Posting a Payment](#). When the payment is posted, the **Total Paid** and **Balance** are adjusted on the **Fees** grid, the Unapplied amount is adjusted on the **Payments** grid and the unapplied payment is removed from the **Unapplied Payments** grid.



To cancel the use of the payment, select **Clear the pre-filled values from payment area above**.

To apply this amount as a donation:

1. Select the unapplied payment to be used as a donation.
2. Click **Apply this amount as a donation**. A confirmation dialog will be shown. Read the details and click **Yes** to continue or **No** to cancel. A fee record with an Item Number of "Donation" will be created. The amount of the unapplied payment will be applied to this new fee record.



An inventory record must exist with the item number "Donation".

# **Chapter**

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**13**

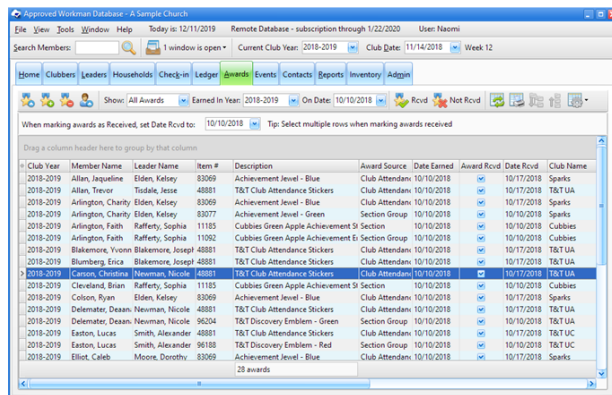
## 13 The Awards Module

★ The Awards Module displays awards earned by all members. It defaults to awards earned on the Current Club Date. Choose to show a different date or "All Dates". New award records can be created, but that is not generally necessary since [awards are generated](#) during recordkeeping.



If the default received status for awards is set to 'not received', after handing out the awards, [multi-select records](#) in this grid and click the **Rcvd** button.

The [Awards report](#) provides a formal report for a Director or Commander to use when presenting awards.



Icon	Action	Description
	<b>Open Award</b>	Opens the selected award in the <a href="#">Award dialog</a> . (Pressing the <b>Enter</b> key with a row selected or double clicking the row also opens the award.)
	<b>New Award (Ctrl-N)</b>	Opens the <a href="#">Award dialog</a> with blank/default values to create a new award.
	<b>Delete Award(s) (Ctrl-D)</b>	Removes the selected award(s).
	<b>Open Member</b>	Opens the member record for the person who earned the selected award.
	<b>Show</b>	Filters the data in the grid. Choose to show <b>All Awards</b> , <b>Not Received</b> or <b>Received</b> awards. <b>Earned in Year</b> limits records to awards earned in the selected club year.
	<b>Rcvd</b>	Marks the selected award(s) as having been received by the member. When marking awards <b>Received</b> , set <b>Date Rcvd to:</b> defaults to the current club date. When working with awards received on a different date, change the date before clicking the <b>Rcvd</b> button.
	<b>Not Rcvd</b>	Marks the selected award(s) as <i>not</i> being received by the member yet.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.

## 13.1 The Award Dialog

★ Opening or creating an award opens the Award dialog to view, modify, or enter details of an award.

Most awards are created automatically so do not need to be manually entered. However, other awards can be added using the Award dialog.

- **Member Name** - person who earned the award
- **Award Name** -selection includes items marked to be used in Award lists in the Inventory record. If an image exists, it is shown in the area below. The Item Number is displayed to the right of the image.
  - If the correct award is not available in the drop-down list, open the award item from the [Inventory Module](#) and click on the **Club Usage** tab. Select **Use this item as a choice in any AWARD related drop-down list**.
- **Award Source** - what caused the award to be earned: **Achievement, Book, Church Attendance, Club Attendance, Donation, Event, Other, Section, Section Group, Service, Training**.
- **Book Name** - enabled when the **Award Source** is set to **Book**, to indicate the relevant book for the award
- **Date Earned** - defaults to the current club date but can be changed
- **Club Year** - filled in automatically. Verify that it is correct or make changes if needed
- **Received** - if **Yes** is selected, the **Date Received** field is enabled
- **Note** - any additional information related to the award

### Action Buttons

- **Save and Close** - saves the record and closes the dialog.
- **Cancel and Close** - exits without creating a new record or saving changes to an existing one.
- **New Award Same Member** - saves the award then selects the same **Member Name** and resets the other fields to blank to begin entering another award.



This is especially useful when entering historical records when getting started.


- **Same Award New Member** - saves the award and leaves all of the award information the same except for the **Member Name** which is left blank. Select the **Member Name** and edit any of the other fields as needed.

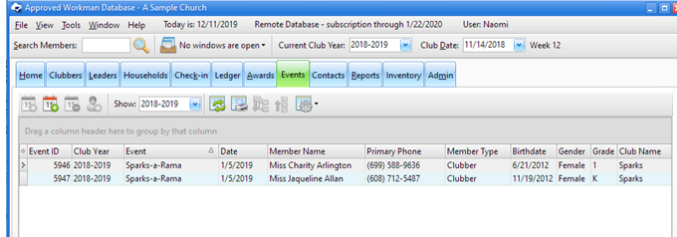
# **Chapter**






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**14**


## 14 The Events Module

 The Events Module tracks participation in events. Add, delete, view, or modify records. Some popular events are provided by default. Customize additional event names under [Admin > System Settings > Generic Lookups > Events](#). Associate awards with events under [Admin > System Settings > Awards > Event Awards](#).



<u>Icon</u>	<u>Action</u>	<u>Description</u>
	<b>Open Event</b>	Opens the selected event in the <a href="#">Event dialog</a> . (Pressing the <b>Enter</b> key with a row selected or double clicking the row also opens the event.)
	<b>New Event</b> (Ctrl-N)	Opens the <a href="#">Event dialog</a> with blank/default values to create a new event.
	<b>Delete Event(s)</b> (Ctrl-D)	Removes the selected event(s).
	<b>Open Member</b>	Opens the member record for the person who participated in the selected event.
	<b>Show</b>	Filters the data in the grid based on Club Year. Defaults to the current club year but can be changed.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.

### 14.1 The Event Dialog

 Opening or creating an event opens the Event dialog to view, modify, or enter details of an event.

- **Member Name** - person who participated in the event
- **Event Name** - selection options are determined by [Admin > System Settings > Generic Lookups > Events](#)
- **Location** - where the event took place
- **Event Date** - date the event took place



- **Club Year** - filled in automatically. Verify that it is correct or make changes if needed.
- **Note** - any additional information related to the event

### Awards

When creating a new event, if an award was earned, indicate the following:

- **Awards earned by this member for this event** - selection options are determined by [Admin > System Settings > Awards > Event Awards](#).
- **Award Received:** selecting **Yes** enables the **Date Received**.



For existing event records, use the [Awards Module](#) to add an event award or edit the event award.

### Action Buttons


- **Save and Close** - saves the record and closes the dialog.
- **Cancel and Close** - exits without creating a new record or saving changes to an existing one.
- **New Event Same Member** - saves the event then selects the same **Member Name** and shows any previous event awards earned by the member to begin entering another event.
- **Same Event New Member** - saves the event and leaves all event information the same, except for the **Member Name**, which is left blank. Select the **Member Name** and edit as needed.

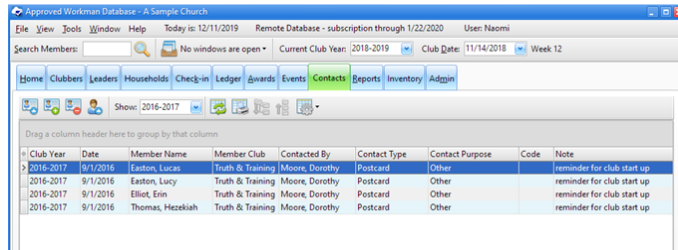
# **Chapter**






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**15**


## 15 The Contacts Module

 Sometimes leaders contact clubbers outside of regular club time, such as making a home visit, a phone call, or sending a "Get Well" card to a sick clubber. The Contacts Module tracks all these contacts.



Icon	Action	Description
	<b>Open Contact</b>	Opens the selected contact in the <a href="#">Contact dialog</a> . (Pressing the <b>Enter</b> key with a row selected or double clicking the row also opens the contact.)
	<b>New Contact (Ctrl-N)</b>	Opens the <a href="#">Contact dialog</a> with blank/default values to create a new contact.
	<b>Delete Contact(s) (Ctrl-D)</b>	Removes the selected contact(s).
	<b>Open Member</b>	Opens the member record for the person who was contacted in the selected record.
	<b>Show</b>	Filters the data in the grid based on Club Year. Defaults to the current club year but can be changed.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.

### 15.1 The Contact Dialog

 Opening or creating a contact opens the Contact dialog to view, modify, or enter details of a contact.

Member Name: Nickleson, Rebecca  
 Contact By: Elden, Kelsey  
 Contact Type: Postcard  
 Purpose: Other  
 Contact Date: 9/12/2018 Club Year: 2018-2019  
 Contact Code:  
 Note: Thanks for visiting.

Buttons: Save and Close, Cancel and Close, New Contact Same Member, Same Contact New Member

Footer: Created 8/6/2016 1:29:11 PM Modified 8/6/2016 1:29:37 PM by Matthew

- **Member Name** - person who was contacted
- **Contact By** - person who made the contact
- **Contact Type** - selection options are determined by [Admin > System Settings > Generic Lookups > Contact Types](#)
- **Purpose** - selection options are determined by [Admin > System Settings > Generic Lookups > Contact Purposes](#)

- **Contact Date** - defaults to the current date but can be changed
- **Club Year** - filled in automatically. Verify that it is correct or make changes if needed.
- **Contact Code** - a short "tag" to identify particular records as needed. This Code column can be made visible in the main Contact list grid.
- **Note** - any additional information relevant to the contact

#### Actions

- **Save and Close** - saves the record and closes the dialog.
- **Cancel and Close** - exits without creating a new record or saving changes to an existing one.
- **New Contact Same Member** - saves the contact then selects the same **Member Name** to begin entering another contact.
- **Same Contact New Member** - saves the contact and leaves all of the contact information the same, except for the **Member Name**, which is left blank. Select the **Member Name** and edit any of the fields as needed.

# **Chapter**

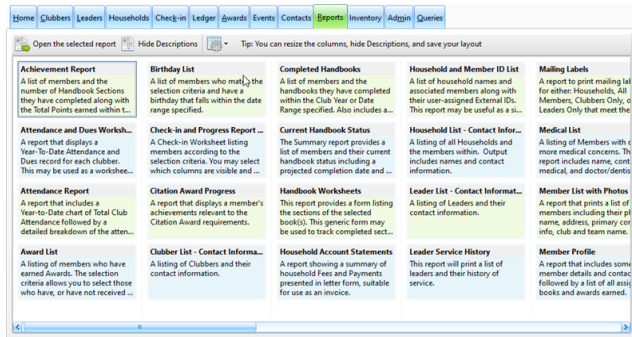
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**16**

## 16 The Reports Module

The Reports Module provides a variety of formal reports. The report options vary slightly, but the steps to generate them are the same. This chapter provides basic instructions. Experiment with options to find the most helpful results.

The main **Reports** page displays each report title (in alphabetical order) with a detailed descriptions.



If the descriptions are not needed, click the **Hide Descriptions** button. The size of the columns can also be adjusted. Use the [Grid menu](#) to **Save the Current Grid Layout**.

1. Click **Open the Selected Report** on the toolbar or double click a report to open the Report Dialog.



The Report Dialog along with examples of each generated report are shown in the following sections. Each report type has different options applicable for running that report. The selected options are saved when the dialog closes and reloaded the next time it is opened.

2. Set the **Selection Criteria** - options for what groups to include in the report. This varies by report, but many include: **Club Name**, **Team Name**, **Member Type**, and **Member Status**. For some reports, the selection criteria includes a **Date Range**.

3. Select **Grouping and/or Sorting Options** - many reports provide radio buttons on the right to indicate how results should be grouped and/or sorted.

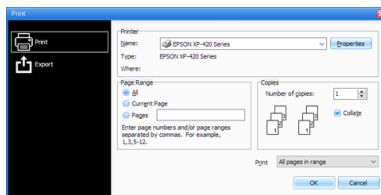
4. Choose **Additional Options** - some reports have additional unique options. For example, several reports allow for shaded rows, and provide a color selection option for selecting the shading color.

5. Click **Preview** - displays the report results to ensure that the desired dataset is generated.

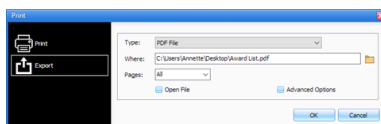


The **Preview** and **Print** buttons are disabled until necessary options are chosen.

6. Click **Print** - opens a Print dialog with options to **Print** or **Export**.



- Select which printer to use, which pages to print and the number of copies.
- When the Printer settings are complete, click **OK**.



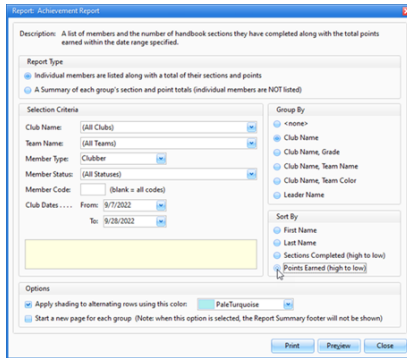
- Select the file type, location to save the file, and which pages to print.
- Click **OK** to export the data.

## 16.1 Achievement Report

This report provides information on number of completed sections and points earned (for both required and extra credit sections) within a specified date range. There are two types of achievement reports:

1. Individual members are listed along with a total of their sections and points.
2. A summary of each group's section and point totals (individual members are NOT listed).

### Report Dialog



### Example Output

#### Report Type # 1

Achievement Report: 9/4/2013		(All Clubs)	ASC Awana Club			
Active/Visitor Clubbers (Sorted by Date, Club Name, Sorted by Last Name)		(All Teams)	4917 Example Street Madison, WI 53714			
Date	Club Name	Member	Required Sections Completed	Extra Cr Sections Completed	Total Sections	Total* Points
9/4/2013	Cubbies					
		Arlington, Charity	0	0	0	0
		Arlington, Douglas	0	0	0	0
		Ellis, Caleb	2	20	0	2
		Ridderick, Bridgette	0	0	0	0
		Seligen, Sara	2	20	0	2
		<b>Cubbies Totals:</b>	<b>4</b>	<b>40</b>	<b>0</b>	<b>4</b>

#### Report Type # 2

Achievement Report: 9/4/2013		(All Clubs)	ASC Awana Club			
Active/Visitor Clubbers (Sorted by Date, Club Name, Sorted by Last Name)		(All Teams)	4917 Example Street Madison, WI 53714			
Summary						
Date		Required Sections Completed	Points	Extra Cr Sections Completed	Points	Total* Points
9/4/2013	Cubbies Totals:	4	40	0	0	4
	Journey Totals:	0	0	0	0	0
	Puggles Totals:	0	0	0	0	0
	Sparks boys Totals:	0	0	0	0	0
	Sparks girls Totals:	18	180	0	0	18
	T&T Adventure Totals:	4	40	0	0	4
	T&T Challenge Totals:	0	0	0	0	0
	Trek Totals:	0	0	0	0	0
	<b>Club Date Totals:</b>	<b>26</b>	<b>260</b>	<b>0</b>	<b>0</b>	<b>26</b>

## 16.2 Attendance and Dues Worksheet

This report uses check boxes to show Club and/or Church Attendance. Information about Dues payments can also be included. It can be used as a worksheet to collect information or a report to reflect history.

### Report Dialog

**Report: Attendance and Dues Worksheet**

Description: A report that displays a Year-To-Date Attendance and Dues record for each member. This may be used as a worksheet to collect info or as a report that reflects history.

**Selection Criteria**

Club Year: 2018-2019  
 Club Name: (All Clubs)  
 Member Type: Clubber  
 Member Status: Active  
 Member Code: (blank = all codes)  
 Club Dates: From: 8/28/2018 To: 12/18/2018

**Group By**

- <none>
- Club Name
- Club Name and Team Color
- Club Name and Team Name
- Grade
- Grade and Team Color
- Grade and Leader
- Leader

**Sort By**

- First Name
- Last Name

**Include Data for**

- Club Attendance
- Church Attendance
- Dues

**Options**

Apply shading to alternating rows using this color: PaleTurquoise

Print Preview Close

### Example Output

**Attendance and Dues Worksheet** Cubbies ASC Awana Club  
 Club Year: 2019-2020 4917 Example Street  
 8/28/2019 to 4/22/2020 Madison, WI 53714

Active Clubber	8/28	9/4	9/11	9/18	9/25	10/2	10/9	10/16	10/23	10/30	11/6	11/13	11/20	11/27	12/4	12/11	12/18	12/25	1/1	1/8	1/15	1/22	1/29	2/5	2/12	2/19	2/26	3/4	3/11	3/18	3/25	4/1	4/8	4/15	4/22		
Arlington, Faith	Club	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
	Church	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Dues: Total	\$15.50																																			
	Paid	\$9.50																																			
	Balance	\$6.00																																			
	Amount Paid This Week	\$																																			
Cleveland, Brian	Club	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
	Church	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Dues: Total	\$15.50																																			
	Paid	\$9.50																																			
	Balance	\$6.00																																			
	Amount Paid This Week	\$																																			
Mifflin, Aaron	Club	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
	Church	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Dues: Total	\$15.50																																			
	Paid	\$8.50																																			
	Balance	\$7.00																																			
	Amount Paid This Week	\$																																			
Riche, Stephanie	Club	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
	Church	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

## 16.3 Attendance Report

This report shows a chart of Total Club Attendance (year-to-date) as well as a detailed breakdown of attendance counts (clubbers, leaders and visitors) by club for each week.

### Report Dialog

**Report: Attendance Report**

Description: A report that includes a Year-to-Date Chart of Total Club Attendance followed by a detailed breakdown of the attendance counts for each individual club for each week.

**Selection Criteria**

Club Year: 2018-2019  
 Club Name: (All Clubs)

Note: The Current Club Date selected in the main toolbar affects the number of weeks displayed and the averages are calculated based only on those weeks.

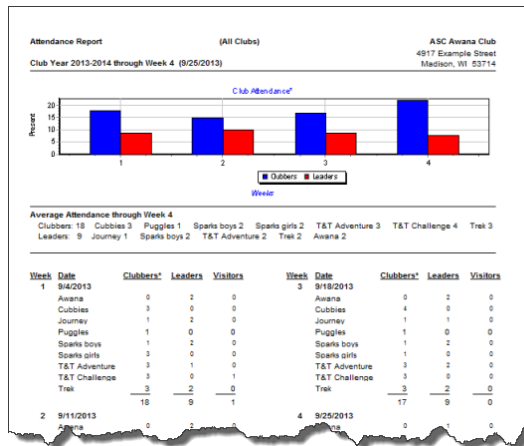
**Chart**

Style: Line Chart  
 2D  3D  Show values  
 Legend Position: Bottom

Print Preview Close



### Example Output



## 16.4 Award List

This report lists information related to awards earned by members such as award name, earned date, received status, and received date as well as a note explaining what was completed to earn the award.

### Report Dialog

**Report: Award List**

Description: A listing of Members that have earned awards according to the selection criteria entered below.

**Selection Criteria**

Club Name: (All Clubs)      Group By:  <none>  Club Name

Team Name: (All Teams)       Club Name, Grade

Member Type: Clubber       Club Name, Team Color

Member Status: (All Statuses)       Club Name, Team Name

Member Code: (blank = all codes)       Club Name, Leader Name

Award Name: (All Awards)      Sort By:  First Name  Last Name

Award Status: (All)      Vertical Spacing:  Single  Double  Triple  Quadruple

Award Source: Book, Other, Section, Section Group      (helpful when cutting the report into strips)

Exclude awards relevant to entrance booklets

Date Earned: From: 11/14/2018 To: 11/14/2018

**Options**

Start a new page for each new group

Apply shading to alternating rows using this color: PaleTurquoise

Buttons: Print, Preview, Close

### Example Output

**Award List (All Awards)**  
 (All Clubs)      ASC Awana Club  
 (All Teams)      4917 Example Street  
 Grouped by: Club Name      Madison, WI 53714

Award Selection: (All Awards)      Source(s): Book, Section Group      (Entrance booklet awards have been excluded)

Clubber Name	Club Name	Date Earned	Award Rec'd	Date Received	Award Name	Note
Arlington, Charity	Cubbies	9/18/2013	No		AppleSeed Trail Emblem	Completed AppleSeed Trail in AppleSeed Handb
	Cubbies	9/18/2013	No		Cubbies Red Apple Achievement Emblem	Completed AppleSeed Trail in AppleSeed Handb
Arlington, Douglas	Cubbies	9/18/2013	No		Cubbies Green Apple Achievement Emblem	Completed HoneyComb Trail in HoneyComb Hanc
	Cubbies	9/18/2013	No		HoneyComb Trail Emblem	Completed HoneyComb Trail in HoneyComb Hanc
Robertson, Bridgette	Cubbies	9/18/2013	No		AppleSeed Trail Emblem	Completed AppleSeed Trail in AppleSeed Handb
	Cubbies	9/18/2013	No		Cubbies Red Apple Achievement Emblem	Completed AppleSeed Trail in AppleSeed Handb
<b>Sparks boys</b>						
Green, Alonzo	Sparks boys	9/25/2013	Yes	9/25/2013	HangGlider Emblem - Green	Completed Rank Section in HangGlider
<b>Sparks girls</b>						
Allen, Stephanie	Sparks girls	9/18/2013	Yes	9/18/2013	HangGlider Emblem - Orange	Completed Rank Section in HangGlider

## 16.5 Birthday List

This report provides a list of members with birth dates in a selected range and includes the member's club, gender, birth date, age, and address.

### Report Dialog

**Report: Birthday List**

Description: A list of members who match the selection criteria and have a birthday that falls within the date range specified.

**Selection Criteria**

Club Name: (All Clubs) [v]  
 Team Name: (All Teams) [v]  
 Member Type: Clubber [v]  
 Member Status: Active [v]  
 Member Code: (blank = all codes)  
 Date Range: From: 10/1/2018 [v] To: 10/31/2018 [v]

**Sort By**

Birthday (month and day)  
 Club, Birthday  
 Club, Team, Birthday  
 Age  
 Show age only for clubbers  
 Show age for all members  
 Do not show any ages

**Options**

Apply shading to alternating rows using this color: PaleTurquoise [v]

[Print] [Preview] [Close]

### Example Output

**Birthday List - 10/1/2013 to 10/31/2013**

All Clubs  
 Clubbers and Leaders with Status = (All Statuses)

ASC Awana Club  
 4917 Examole Street  
 Madison, WI 53714

Name	Club	Gender	Birth Date	Age	Address
Bridgette Robertson	Cubbies	Female	10/8/2008 Wednesday	just turned 6	P. O. Box 007 Madison, WI 53708
Jenny Uppenheim	T&T Adventure	Female	9/22/2005 Monday	just turned 9	656 Ratherstraight Rd Madison, WI 53704
Janetta Douglas	Journey	Female	10/15/1997 Wednesday	just turned 11	1542 Washington Ave. Madison, WI 53704
Emily Leffer	Puppies	Female	10/20/2011 Monday	just turned 3	Madison, WI 53714
Emma Leffer	Awana	Female	10/22 Wednesday		255 Pebble Drive Madison, WI 53719
Sara Selden	Cubbies	Female	10/22/2008 Wednesday	just turned 6	Madison, WI 53714
Charles Baker	Journey	Male	10/25/1997 Saturday	just turned 11	600 Coolidge Dr Sun Prairie, WI 53527
Nat Shipwith		Male	10/31/1990 Friday	just turned 21	Madison, WI 53714
Annette Jones	Awana	Female	10/31 Friday		9 Millie Court Madison, WI 53714

## 16.6 Check-in and Progress Report Worksheet

This report produces a customizable worksheet for recording attendance and check-in information as well as completed sections. The current book and last section completed may be displayed along with a blank line to record new sections. Another option allows using the report as a sign-out sheet. An extra column may be shown with a custom heading and the option to show the Non-parent authorized pickup persons.

### Report Dialog

**Report: Check-in and Progress Report Worksheet**

Description: A worksheet for recording attendance details and completed sections.

**Selection Criteria**

Club Date: 9/29/2022 [v]  
 Club Name: (All Clubs) [v]  
 Team Name: (All Teams) [v]  
 Member Type: Clubber [v]  
 Member Status: (All Statuses) [v]  
 Member Code: (blank = all codes)  
 Include visitors only if they have attended since: 5/1/2022 [v]

**Group By**

none  
 Club Name  
 Club Name, Grade  
 Club Name, Team Color  
 Club Name, Team Name  
 Team Name, Leader Name

**Sort By**

First Name  Last Name

**Info to display to the right of the Check-in Categories**

Current book & last section completed and blank lines to record new sections  
 Other - use a column heading of: Notes (e.g. 'Sign-out Signature')  
 Include authorized Non-parent pickup persons

**Options**

Include the following note on each worksheet:  
 Here's an example of when the Commander or Secretary can include a note that will print on each of the worksheets.

I'm using a color printer, so print the Team Color text inside a block of the Team's color  
 Shade alternate rows with: PaleTurquoise [v] Page Orientation: Landscape [v]  
 Show an indicator (-) next to member names who do not have a "current" registration

[Select Visible Columns...] [Print] [Preview] [Close]

### Example Output

Check-in & Progress Report		Cubbies - A Wing				ASC Awana Club 4917 Example Street Madison, WI 53714	
Club Date:	Week #	Grade P2					
Theme/Event:	Attendance	In Uniform	Has Bible	Has Bonus	Current Book & Last Req	Section Done	Sections Done Today
Bridgette Robertson	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	AppleSeed Handbook Bear Hug 3		
Caleb Elliot	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	HoneyComb Handbook AppleSeed Handbook Bear Hug 2 skipped: Unit 1.1		
Charity Arlington	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	AppleSeed Handbook Bear Hug 2		
Sara Selden	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	AppleSeed Handbook Bear Hug 3 skipped: Unit 1.1.2		

Visitor's Name	Birth Date	Grade	Gender	Parent's Name	Home Phone	1st Time Brought By	Notes / Sections Completed

Note from the Commander or Secretary: Here is an example of where the Commander or Secretary can include a note that will print on each of the worksheets.

Note from the Leader:

## 16.7 Citation Award Progress

This report displays all completed books along with details applicable to the Citation Award requirements for the selected member(s). There is an option to include a second page for each member with completion details for the required reading of each book of the Bible.

### Report Dialog

**Report: Citation Award Progress**

Description: A report that displays all completed books for the selected member(s) along with details applicable to the Citation Award requirements.

**Selection Criteria**

Club Name:

Team Name:

Member Type:

Member Status:

Member Code:  (blank = all codes)

All members that match the criteria above

Only those members selected below (based on criteria above):

**Sort By**

First Name

Last Name

Club Name, Last Name

Club Name, Team Name

Club Name, Leader Name

**Options**

Include a second page for each member to show their Bible Reading Details

### Example Output

Citation Award Progress Report		Journey		ASC Awana Club 4917 Example Street Madison, WI 53714	
Books	% Completed	Other Requirements	Completed		
<b>Truth &amp; Training</b>					
Start Zone	100	9/10/2014	<b>Trek</b>		
Ultimate Adventure 1 (2010)	100	4/22/2015	Bible Readings		
Ultimate Adventure 2 (2010)	100	4/13/2016	Trek Bible Reading - Y1 1 of 2	4/17/2019	
Ultimate Challenge 1	100	4/19/2017	Trek Bible Reading - Y1 2 of 2	4/15/2020	
Grace in Action	100	4/18/2018	Bring a Friend		
<b>Trek</b>					
Trek Check	100	8/29/2018	<b>Job</b>		
"His Story" Bible Study	100	4/29/2020	Bible Readings		
"His Love" Bible Study	100	4/24/2019			
<b>Journey</b>					
Faith Foundation (Y1)	100	8/26/2020	Share Your Faith*		
Disciples Bible Study	66		Disciples Bible Study	9/30/2020	
			Attend Christian Seminars*		
			Disciples Bible Study	12/2/2020	

## 16.8 Clubber List - Contact Information

This report provides detailed contact information for clubbers including Clubber Information, Parents/Guardian Information and Household Contact Information. It can also be used to get contact information for visitors from a specific club date while the Member Status is still set to "Visitor".

### Report Dialog

### Example Output

Clubber Info		Parents / Guardian	Household Contact Info	
Blakemore, Yvonne Female age 11 6/13/2003 Gr: 5 T&T Challenge	Mr Joseph and Claudia Blakemore 6000 Rodeo Dr Apt 2 Madison, WI 53714	Cell Phone (325) 987-4510 E-mail joe@securyservices.com E-mail claudlab@gmail.com Home Phone 608-555-3751	Joseph Joseph Claudia Mr. Blakemore	
Clark, Penny Female age 11 4/7/2003 Gr: 5 T&T Challenge	Mr and Mrs Clark Madison, WI 53714	Emergency (608) 588-8787	Jeffrey Clark	
Loomis, Cindy Female age 11 2/27/2003 Gr: 5 T&T Challenge	Mr and Mrs Loomis Madison, WI 53714	Home Phone (608) 655-9666	Meredith Loomis	
Maxwell, Jane Female age 11 8/1/2003 Gr: 5 T&T Challenge	Mr and Mrs Maxwell 2375 Aviator Street Madison, WI 53714	Emergency 608-555-2227	Mr. Maxwell	
Mundy, Gillian Female age 10 1/2/2004 Gr: 5 T&T Challenge	Mr and Mrs Mundy 700 Gerard Street Madison, WI 53714	Emergency 608-555-3572 Home Phone 608-555-1853	Mr. Mundy Mr. and Mrs. Mundy	

## 16.9 Completed Handbooks

This report lists active members who have completed handbooks within the club year or date range specified. It also includes information pertaining to any corresponding awards.



Entrance Booklets are excluded from the report output.

### Report Dialog

### Example Output

Completed Handbooks		(All Clubs)	ASC Awana Club		
Completed = Club Year 2011-2012		(All Teams)	4917 Example Street Madison, WI 53714		
Club and Member Name	Handbook Name	Date Completed	Award Box1	Date Box2	Award Name
<b>Cubbies</b>					
James Uppenheim	Jumper Celebrations	4/25/2012	<input checked="" type="checkbox"/>	4/25/2012	Cubbies Year Two Book Award
Jacqueline Allan	Jumper Celebrations	4/25/2012	<input checked="" type="checkbox"/>	4/25/2012	Jumper VIP Diploma
Nora Sabello	Jumper Celebrations	4/18/2012	<input checked="" type="checkbox"/>	4/25/2012	Cubbies Year One Book Award
			<input checked="" type="checkbox"/>	4/25/2012	Jumper VIP Diploma
			<input checked="" type="checkbox"/>	4/25/2012	Cubbies Year Two Book Award
			<input checked="" type="checkbox"/>	4/25/2012	Jumper VIP Diploma
<b>Journey</b>					
Dan Harmon	Galatians and Ephesians	4/25/2012	<input checked="" type="checkbox"/>	4/25/2012	Marforious Award and Pin
Jametta Doucra	Galatians and Ephesians	4/25/2012	<input checked="" type="checkbox"/>	4/25/2012	Timothy Award and Pin
Margo Balser	Galatians and Ephesians	2/22/2012	<input checked="" type="checkbox"/>	4/25/2012	Timothy Award and Pin
Nikki Zelenka	Galatians and Ephesians	4/4/2012	<input checked="" type="checkbox"/>	4/25/2012	Journey Certificate of Award
Stephie Kaedie	Galatians and Ephesians	4/18/2012	<input checked="" type="checkbox"/>	4/25/2012	Journey Certificate of Award
<b>Sparks boys</b>					
Jared Uppenheim	SkyStormer	2/22/2012	<input checked="" type="checkbox"/>	4/25/2012	Sparky Award Plaque and Award Pin
Jared Uppenheim	SkyStormer	4/18/2012	<input checked="" type="checkbox"/>	4/25/2012	Sparky Award Plaque and Award Pin

## 16.10 Current Handbook Status

This report provides a way to evaluate progress in currently assigned handbooks. There are three types:

- Summary** - No individual sections are listed. Statistics such as Required Sections Complete and Average per Week are shown for each current book. Estimated completion dates and awards due upon completion are also given to assist in year end planning and ordering supplies.
- Detail** - Lists all sections in the member's current handbook along with the date completed. A separate page is printed for each member. This can be used as a report or a worksheet.
- Quick View** - shows each member's club and current book followed by a bar graph representing progress in completing the required sections.

Once the report has been previewed, the **Show Data** button is enabled. Click the button to see the report results in a grid format. The grid allows additional analysis of the data using the standard [grid functionality](#).

### Report Dialog

### Example Output

#### Report Type: Summary

Current Handbook Status as of 11/20/2014		Sparks boys, Sparks girls				ASC Awana Club			
(All Statistics) Clubbers who have completed at least 0% of the required sections in their current handbook		Sorted by Club Name, Last Name (All Teams)				4917 Example Street Madison, WI 53714			
Member Info	Gr	Last Attend	Ratio	Club Name	Book	Required Sections Done	% Complete	On Est. Completion	Awards Due Upon Completion
Allan, Trevor	8/20/2013	10/12	Sparks boys	WingRunner	15 of 40	1.7	1.1	<input checked="" type="checkbox"/>	3/5/2014 Sparks Second Book Award Ribbon
Brakenheimer, Kevin	5/4/2013	7/12	Sparks boys	SkyStormer	10 of 40	1.1	1.4	<input checked="" type="checkbox"/>	5/29/2014 Sparky Award Plaque and Pin
Green, Alonso	8/20/2013	10/12	Sparks boys	Flight 3:16	6 of 6	0.5	0	<input checked="" type="checkbox"/>	9/11/2013 Now eligible for Sparks uniform and book Sparks Membership Card
Loomis, Om	8/20/2013	10/12	Sparks boys	WingRunner	17 of 40	1.7	1.1	<input checked="" type="checkbox"/>	8/27/2014 Sparks First Book Award Ribbon
Loomis, Om	8/20/2013	10/12	Sparks boys	WingRunner	17 of 40	1.7	1.1	<input checked="" type="checkbox"/>	8/27/2014 Sparks Second Book Award Ribbon

Report Type: Detail

Uppenheim, James      Current Handbook Status as of 11/20/2014      ASC Awana Club  
 State: Age: 7    Grade: 1    Sparks boys    Team Color - Green    4917 Example Street  
 Registered: 8/28/2013    Attendance Ratio: 9/12    Status: Active    Madison, WI 53714

WingRunner	Item	Required Sections	Done	Avail'd*	Needed**	% Complete	On Schedule	Estimated Completion	Awards Due Upon Completion
18 of 40	WingRunner Handbook with Audio CD - NKU	10 of 40	1.5	1.1	100%	<input checked="" type="checkbox"/>		3/12/2014	Sparks Second Book Award Ribbon

Required Sections

Completed	Completed	Completed	Completed	Completed
3/11/2013 Rank Section 1	3/22/2013 Red Jewel 1.2	Red Jewel 2.3	Red Jewel 3.4	Open Jewel 4.1
3/11/2013 Rank Section 2	3/22/2013 Red Jewel 1.3	Red Jewel 2.4	Open Jewel 3.1	Open Jewel 4.2
3/11/2013 Rank Section 3	3/23/2013 Red Jewel 1.4	Open Jewel 2.1	Open Jewel 3.2	Open Jewel 4.3
3/11/2013 Rank Section 4	3/22/2013 Open Jewel 1.1	Open Jewel 2.2	Open Jewel 3.3	Open Jewel 4.4
3/11/2013 Rank Section 5	3/23/2013 Open Jewel 1.2	Open Jewel 2.3	Open Jewel 3.4	Open Jewel 4.5
3/11/2013 Rank Section 6	3/13/2013 Open Jewel 1.3	Open Jewel 2.4	Red Jewel 3.1	Red Jewel 4.2
3/23/2013 Rank Section 7	3/13/2013 Open Jewel 1.4	Red Jewel 2.1	Red Jewel 3.2	Red Jewel 4.3

Report Type: Quick View

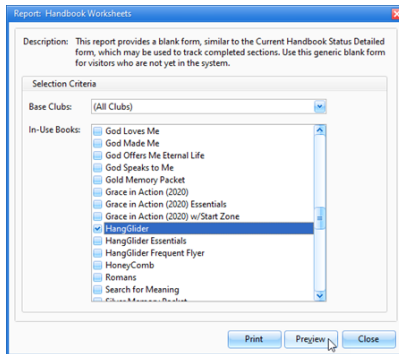
Current Handbook Status as of 2/13/2019    Sparks Boys, Sparks Girls, T&T Adv.    ASC Awana Club  
 Active Clubbers who have completed at least    T&T Chall    4917 Milwaukee Street  
 0% of the required sections    Club Date 2/13/2019    Week 25    Madison, WI 53714

Club and Member	Current Book	% Complete and Progress made in the Required Sections
<b>Sparks Boys</b>		
Aiken, Jeff	HoneyComb	15
<b>Sparks Girls</b>		
Leffler, Emily	HangGlider	7
Levis, Anna	HangGlider	15
<b>T&amp;T Adv</b>		

16.11 Handbook Worksheets

This report provides a way to print blank handbook forms similar to the Current Handbook Status Detailed form used to track completed sections. Select the book(s) to print using the drop-down selection for "In-Use Book". Note: The selection options are determined by the Base Club/s selected.

Report Dialog



Example Output

HangGlider      Sparks      ASC Awana Club

Required Sections

Rank Section 1	Red Jewel 1.2	Red Jewel 2.3	Red Jewel 3.4	Open Jewel 4.1
Rank Section 2	Red Jewel 1.3	Red Jewel 2.4	Open Jewel 3.1	Open Jewel 4.2
Rank Section 3	Red Jewel 1.4	Open Jewel 2.1	Open Jewel 3.2	Open Jewel 4.3
Rank Section 4	Open Jewel 1.1	Open Jewel 2.2	Open Jewel 3.3	Open Jewel 4.4
Rank Section 5	Open Jewel 1.2	Open Jewel 2.3	Open Jewel 3.4	Open Jewel 4.5
Rank Section 6	Open Jewel 1.3	Open Jewel 2.4	Red Jewel 3.1	Red Jewel 4.2
Rank Section 7	Open Jewel 1.4	Red Jewel 2.1	Red Jewel 3.2	Red Jewel 4.3
Rank Section 8	Open Jewel 1.5	Red Jewel 2.2	Red Jewel 3.3	Red Jewel 4.4

Required Book Sections

Open Jewel 1.1	Open Jewel 1.2	Open Jewel 1.3	Open Jewel 1.4	Open Jewel 1.5
Open Jewel 2.1	Open Jewel 2.2	Open Jewel 2.3	Open Jewel 2.4	Open Jewel 2.5
Open Jewel 3.1	Open Jewel 3.2	Open Jewel 3.3	Open Jewel 3.4	Open Jewel 3.5
Open Jewel 4.1	Open Jewel 4.2	Open Jewel 4.3	Open Jewel 4.4	Open Jewel 4.5

Child's Name: \_\_\_\_\_ Parent Name: \_\_\_\_\_ Leader Name: \_\_\_\_\_  
 Birthdate: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_      600033 2 44 50 PM

## 16.12 Household Account Statements

This report provides a summary of household Fees and Payments suitable to use as an invoice.



Customize the opening paragraph text under **Admin > System Settings > Options > Fees and Dues > Account Statement**.

### Report Dialog

**Report: Household Account Statements**

Description: A report showing a summary of household Fees and Payments presented in a letter format, suitable for use as an invoice.

Note: You may customize the opening paragraph text under Admin > Options > Fees and Dues > Account Statement.

**Selection Criteria**

The Household of: [ ]

All Households with a Status of Active [v]

Only the Households selected below (this is a list of Active Households)

None selected [v]

Select Fees from the Current Club Year only

Exclude Fees that are related to Dues

Do not print statements for households with a zero balance

Include a section listing each household member's name and club

Include Inactive Members (Graduated, Archived and Prospective Members are always automatically excluded)

**Options**

I am using a window envelope so start the Name and Address block at:

Top: 2.000 [v] Left: 1.000 [v]

[Print] [Preview] [Close]

### Example Output

**Household Account Statement**

A Sample Church  
ASC Awana Club  
4917 Example Street  
Madison, WI 53714

---

Maretti Family  
31210 Langstrom Lane  
Madison, WI 53713

**Household Members**

Miss Anna Maretti	Trek	Clubber
Mr Michael Maretti	Trek	Clubber

Dear Awana Club Family:

This Household Account Statement is provided to give you an accounting of charges and credits relevant to those family members who are participating in the club. If you have a balance due, we ask that you please help cover the costs by dropping off a full or partial payment to the Awana Club Secretary.

If you need assistance to cover a balance due, please contact the Club Secretary as there may be scholarship funds made available through donations from others.

Member	Description	Item	Roud	Amount	Total	Ed	Balance	Note
Michael	Dues for the 2013-2014 Club Year	9/4/2013	\$17.00	\$0.00	\$17.00			
Anna	Dues for the 2013-2014 Club Year	9/4/2013	\$17.00	\$17.00	\$0.00			
Michael	Trek One Bible Study - NKJV	9/4/2013	\$9.00	\$0.00	\$9.00			
Anna	Trek One Bible Study - NKJV	9/4/2013	\$9.00	\$0.00	\$9.00			
			\$52.00	\$17.00	\$35.00			

## 16.13 Household and Member ID List

This report lists user-assigned External IDs and household names along with parents and others authorized to pick up clubbers. All Household members are listed. It can be used as a sign-out sheet.



Under **Admin > System Settings > Options > Members**, check the box to "Show the external ID fields on the Member form" to show the external ids on the [Member Window's Main](#) tab.

### Report Dialog

**Report: Household and Member ID List**

Description: A report that displays each Household Name and user-assigned External ID. Also included is a list of associated members and their External IDs. This report is useful if you have a formal check-in/check-out policy and are using this as a sign-out sheet.

**Selection Criteria**

Club Name: [All Clubs] [v]

Team Name: [All Teams] [v]

Member Type: [Clubber] [v]

Member Status: [All Statutes] [v]

Member Code: [ ] (blank = all codes)

Include only those members who were present on: 9/19/2018 [v]

Tip: After all clubbers have checked in and club night is well underway, print this report to include only those present and use it as a sign-out sheet when clubbers are picked up.

**Info to display to the right of the Member names**

Heading: Sign-out Signature and Time [v]

A blank underscored line suitable for a signature

An empty checkbox (perhaps to indicate a clubber was picked up)

Nothing (and don't print the heading either)

**Options**

Shade alternate rows with: [PaleTurquoise] [v]

[Print] [Preview] [Close]

## Example Output

Household and Member ID List		-- CONFIDENTIAL --		ASC Awana Club 4917 Example Street Madison, WI 53714	
(All Statuses) Clubbers who were present on 9/25/2013 (All Clubs)					
ID	Household Name / Parents & Others Authorized to Pick Up the Children	ID	Members Name and Club	Sign-out Signature	
	Allen - David, Mikayla, Dorothy Mr and Mrs Allen		Dorothy Allen Sparks girls	_____	
	Allan - Jack, Janice, Trevor, Jaquell Mr and Mrs Allan		Jaqueline Allan Trevor Allan Sparks girls Sparks boys	_____ _____	
	Arlington - Gavin, Marissa, Charity, I Gavin and Marissa Arlington Jennifer Nichols (aunt)		Douglas Arlington Cubbies	_____	

## 16.14 Household List - Contact Information

This report provides address and contact information for Households. It includes the Family Church and a list of all members in the Household. (External IDs can optionally be shown.)



Under **Admin > System Settings > Options > Members**, check the box to "Show the external ID fields on the Member form" to show the external ids on the [Member Window's Main](#) tab.

### Report Dialog

Report: Household List - Contact Information

Description: A listing of all Households and the members within. Output includes names and contact information. The external IDs are optional.

Selection Criteria

Household Status:

Family Church:

Include the External Household and Person IDs

Birthdates and Ages

Show only for clubbers

Show for all members

Do not show for anyone

### Example Output

Household List - Contact Information		-- CONFIDENTIAL --		ASC Awana Club 4917 Example Street Madison, WI 53714	
Status = Active					
Household Name and Address	Contact Info				
Allen - David, Mikayla, Dorothy Mr and Mrs Allen Madison, WI 53714 Family Church: East Madison Baptist church	Allen, David	Male			Inactive Leader
	Allen, Mikayla	Female	dob: 5/3/2008	Age: 8	Grade: 2
	Allen, Dorothy	Female	dob: 5/30/2007	Age: 7	Grade: 1
					Active Sparks girls Clubber
Allan - Jack, Janice, Trevor, Jaqueline Mr and Mrs Allan 41 Birchwood Circle Madison, WI 53714 Family Church: East Madison Baptist Church	Allen, Jack	Male			Active Leader
	Allen, Janice	Female			Active Leader
	Allen, Jaqueline	Female	dob: 11/23/2007	Age: 8	Grade: X
	Allen, Trevor	Male	dob: 3/18/2009	Age: 8	Grade: 2
					Active Sparks girls Clubber
Arlington - Gavin, Marissa, Charity, Douglas Gavin and Marissa Arlington Madison, WI 53714	Call Phone: 785-555-0111				Gavin Marissa

## 16.15 Leader List - Contact Information

This report provides detailed contact information for leaders including Mailing Name and Address as well as other (phone and e-mail) Contact Information.

### Report Dialog

Report: Leader List - Contact Information

Description: This report will print a list of leaders and their contact information.

Selection Criteria

Club Name:

Member Status:

Member Code:

Include LITs

Group By

(none)

Club Name

Sort By

First Name

Last Name



### Example Output

Leader List - Contact Information -- CONFIDENTIAL -- ASC Awana Club  
Active Leaders in (All Clubs) 4917 Example Street  
Madison, WI 53714

Leader	Mailing Name and Address	Contact Info
Allan, Jack Leader	Mr. Jack Allan 41 Birchwood Circle Madison, WI 53714	Cell Phone (608) 858-8555 Jack
		Cell Phone (608) 858-8556 Janice
Allan, Janice Leader/Other	Mrs. Janice Allan 41 Birchwood Circle Madison, WI 53714	Cell Phone (608) 858-8555 Jack
		Cell Phone (608) 858-8556 Janice
Arlington, Marissa Leader	Mrs. Marissa Arlington 359 Senesler Drive Madison, WI 53714	Cell Phone 699-580-5511 Gavin
		E-mail marjon@yahoo.com Marissa
Blakemore, Claudia Leader/Other	Mrs. Claudia Blakemore 6000 Rodeo Dr Apt 2 Madison, WI 53714	E-mail gavin@yahoo.com Gavin
		Home Phone 699-580-9636 Marissa & Gavin
Blakemore, Claudia Leader/Other	Mrs. Claudia Blakemore 6000 Rodeo Dr Apt 2 Madison, WI 53714	Cell Phone (325) 987-4510 Joseph
		E-mail joe@courtyeservices.com Joseph
Blakemore, Joseph Sports Director	Mr. Joseph Blakemore 6000 Rodeo Dr Apt 2 Madison, WI 53714	E-mail claudab@gmail.com Mrs. Blakemore
		Home Phone 608-555-3751
Blakemore, Joseph Sports Director	Mr. Joseph Blakemore 6000 Rodeo Dr Apt 2 Madison, WI 53714	Cell Phone (325) 987-4510 Joseph
		E-mail joe@courtyeservices.com Joseph
Blakemore, Joseph Sports Director	Mr. Joseph Blakemore 6000 Rodeo Dr Apt 2 Madison, WI 53714	E-mail claudab@gmail.com Claudia
		Home Phone 608-555-3751

## 16.16 Leader Service History

This report provides information pertaining to a leader's history of service. There are two types of Leader Service History reports available:

1. **Detailed** - includes Name, Total Years of Service and Service Pin years with details for each year
2. **Summary** - includes Name, Total Years of Service and Service Pin years

### Report Dialog

Report: Leader Service History

Description: This report will print a list of leaders and their history of service (based on the Service History records).  
Note: Records used in this report are those displayed in the grid under the Leadership tab of the Member form. The Total Years of Service are displayed separately from Service Pin Years, which indicate years of service that qualify toward the Service Pin Award.

Report Type

Detailed - Includes Name, Total Years of Service and Service Pin years followed by details for each year.

Summary - Includes Name, Total Years of Service and Service Pin years

Selection Criteria

All Leaders who served in any club year

Only Leaders who served in: 2018-2019

Include all service records that meet the criteria for selected leaders

Leadership Role: \* (All Roles)

Club Name: \* (All Clubs)

Role Status: (All Statuses)

Member Code: (blank = all codes)

Service Pin: (All)

\* Pertains to the value(s) stored in the Service History records, which may be different from a leader's current role and club name.

Sort by

Leader Name - Years of Service - Service Pin

Leader Name - Service Pin - Years of Service

Years of Service (low to high) - Name - Service Pin

Years of Service (high to low) - Name - Service Pin

Service Pin Years (low to high) - Years of Service - Name

Service Pin Years (high to low) - Years of Service - Name

Options

Include the leader's attendance ratio for the current year

Update Leader Service History

Print Preview Close

### Example Output

#### Report Type: Detailed

Leader Service History (All Clubs) ASC Awana Club  
(All Statuses) Leaders who served in 2015-2016 4917 Milwaukee Street  
Madison, WI 53714

Leadership Roles: (All Roles)

Leader Name - Total Years Served - Service Pin Years

Club Year	From	To	Yrs	Pin	Leadership Role	Club	Note
<b>Alen, David - 3 Yrs Total - 3 Yr Pin</b>							
2015-2016	9/9/2015	4/27/2016	1	<input checked="" type="checkbox"/>	Leader	Awana	
<b>Allan, Jack - 8 Yrs Total - 8 Yr Pin</b>							
2015-2016	9/9/2015	4/27/2016	1	<input checked="" type="checkbox"/>	Journey Director	Journey	
<b>Allan, Janice - 4 Yrs Total - 4 Yr Pin</b>							
2015-2016	9/9/2015	4/27/2016	1	<input checked="" type="checkbox"/>	Leader	T&T Adventure	
<b>Arlington, Marissa - 7 Yrs Total - 7 Yr Pin</b>							
2015-2016	9/9/2015	4/27/2016	1	<input checked="" type="checkbox"/>	Leader	Journey	
<b>Blakemore, Claudia - 8 Yrs Total - 8 Yr Pin</b>							

## Report Type: Summary

Leader Service History	(All Clubs)	ASC Awana Club
(All Statuses) Leaders who served in 2015-2016		4917 Milwaukee Street Madison, WI 53714
Leadership Roles: (All Roles)		
<b>Leader Name - Total Years Served - Service Pin Years</b>		
Alen, David - 3 Yrs Total - 3 Yr Pin		
Allan, Jack - 8 Yrs Total - 8 Yr Pin		
Allan, Janice - 4 Yrs Total - 4 Yr Pin		
Arlington, Marissa - 7 Yrs Total - 7 Yr Pin		
Blakemore, Claudia - 8 Yrs Total - 8 Yr Pin		
Blakemore, Joseph - 6 Yrs Total - 6 Yr Pin		

## 16.17 Mailing Labels

This report produces mailing labels for either: Households, All Members, Clubbers Only, or Leaders Only. The output is formatted for 1" x 2 5/8" 30/page sheets of mailing labels (such as Avery 5160 or 8160). It provides flexibility in selecting members (even visitors) that were either absent on a given club date or present within a particular date range. This makes it quick and easy to generate labels for postcards to send to absentee clubbers or new visitors.

### Report Dialog

Report: Mailing Labels

Description: This report will produce output formatted for use with the 1" x 2 5/8" 30/page sheets of mailing labels (such as Avery 5160 or 8160).

Selection Criteria

Select from:  Households  All Members  Clubbers Only  Leaders Only

with at least one member in

Club Name: (All Clubs)

Team Name: (All Teams)

Household Status: (All Statuses)

Member Code: (blank = all codes)

Select only members who were absent on the club date of 5/19/2018

Exclude the Leader-only Households (those without Clubbers)

Include only the names checked in the following list

None selected

Options

Include the Parent's Name when a label is addressed to a Clubber

Use "c/o" in front of the Parent's Name when label is addressed to a Clubber

Do not print a label if the Parent's Name is blank

Do not print a label if the Address Line is blank

Show Border (Useful when testing printer alignment of labels.)

2kip: 0 Top Margin Adj: 0

Print Preview Close

### Example Output

Adler Family 833 Prensario Drive Apt 3b Madison, WI 53714	Farmer Family - Jonah, Kim, Nathan, P 895 Countryside Lane Madison, WI 53714	Marie Sverson 123 Open Sesame Street Madison, WI 53704
Allan Family 41 Birchwood Circle Madison, WI 53714	Haley Watson 12345 Sherlock Avenue Apt 3B Madison, WI 53714	Maxwell Family 2379 Aviator Street Madison, WI 53714
Arlington Family 350 Semester Drive Madison, WI 53714	Harmon Family 110 Windwept Lane Madison, WI 53716	Moore Family 8216 Major Ave. Madison, WI 53714

## 16.18 Medical List

This report lists information that might be needed for members with medical concerns including name, contact information, medical notes, as well as doctor and dentist info.



To be included in this report, the "**Include on Medical Listing**" check box must be selected on the Member's [Misc. tab](#).

### Report Dialog

**Report: Medical List**

Description: A listing of Members with one or more medical concerns. The report includes name, contact, allergies, medical notes, doctor and dentist information.

Note: To be included in this report, the member's "Include on Medical Listing" checkbox must be checked.

Selection Criteria

Club Name: (All Clubs)

Team Name: (All Teams)

Member Type: Clubber

Member Status: (All Statuses)

Member Code: (blank = all codes)

Print Preview Close

### Example Output

Medical Listing (All Statuses) Clubbers (All Teams)	— CONFIDENTIAL — (All Clubs)	ASC Awana Club 4917 Examole Street Madison, WI 53714
<b>Adler, Andy</b>		
Male age: 12 Gr: 6 Job: 5/2/2002	Bill and Susan Adler 833 Pizarro Drive Apt 3b Madison, WI 53714	Cell Phone (715) 987-9112 Emergency (800) 656-2148 Home Phone (800) 987-9123
Allergy To: Peanuts		
<b>Baker, Charles (Chaz)</b>		
Male age: 17 Gr: 11 Job: 10/25/1991	Rebecca Stearns 900 Coolidge Dr Sun Prairie, WI 53227	Emergency (800) 656-4074 Home Phone (800) 656-4803
Allergy To: Dust mites		
<b>Clark, Ethan</b>		
Male age: 15 Gr: 9 Job: 1/3/1999	Mr and Mrs Clark 15 Zagnut Lane Madison, WI 53714	Cell Phone (715) 584-4320 Cell Phone (715) 880-8822 E-mail ethancl@myemail.com E-mail rachaelcl@yphoo.com Home Phone (715) 582-0001
Allergy To: Ibuprofen / Monks		
Doctor: Dr. Dukles, (715) 584-2012		
<b>Clark, Rachael</b>		
Female age: 13 Gr: 7 Job: 7/6/2001	Mr and Mrs Clark 15 Zagnut Lane Madison, WI 53714	Cell Phone (715) 584-4320 Cell Phone (715) 880-8822 E-mail ethancl@myemail.com E-mail rachaelcl@yphoo.com Home Phone (715) 582-0001
Allergy To: Dairy		
Doctor: Dr. Dukles, (715) 584-2012		

## 16.19 Member List with Photos

This report provides a directory style list of members. In addition to the photo, the following is included: name, address, phone numbers, club name, and team name. For clubbers, age, date of birth, grade, and parent names are also included.

### Report Dialog

**Report: Member List with Photos**

Description: A list of members including their photo, name, address, primary phone and email, an emergency phone, club and team name, age, birthdate, and grade. Parent names are also included for clubbers.

Selection Criteria

Club Name: (All Clubs)

Team Name: (All Teams)

Member Type: Clubber

Member Status: (All Statuses)

Member Code: (blank = all codes)

Group By

(None)

Club Name

Grade

Team Color

Team Name

Leader Name

Sort By

First Name

Last Name

Print Preview Close



## 16.21 Name Tags

This report prints Name Tags/Badges according to the specifications selected.



The Code field is useful as a subtle way to identify clubbers with food allergies, special needs or if there are security concerns.

### Report Dialog

**Report: Name tags**

Description: Name tags/badge inserts will be printed according to specifications selected. Tip: The Code field is useful when you need a subtle way to identify clubbers with special needs or if there are security concerns.

**Output Size:** 1" x 2 5/8" (selected), 2" x 4", 2" x 3 1/2", 3" x 4"

**Selection Criteria:**  
 Member Type: Clubber  
 All Clubbers that match the following conditions:  
 Club Name: (All Clubs)  
 Team Name: (All Teams)  
 Member Status: (All Statuses)  
 Member Code: (blank = all codes)  
 Only those Active/Visiting Clubbers selected below:  
 (None selected)  
 Only include members who attended club on: 8/12/2018

**Sort By:**  
 First Name, then Last Name  
 Last Name, then First Name  
 Team Color, then First Name  
 Team Color, then Last Name  
 Club Name, Team Color, First Name  
 Club Name, Team Color, Last Name  
 Club Name, First Name, Last Name  
 Club Name, Last Name, First Name

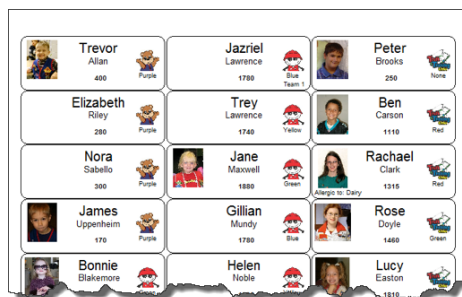
**Include the Member's:**  
 Photo  
 Club Logo  
 Last Name  
 Total Points  
 No of Service  
 Code  
 Team Name  
 Team Color (as Text)  
 Allergies  
 External Household ID

**Options:**  
 I'm using a color printer, so print the Team Color in a block of color  
 Show Border (Useful when testing printer alignment of labels)

Skip: 0, Top Margin Adj: 0 in, # of tags per member: 1

Print Preview Close

### Example Output



## 16.22 Point List and Worksheet

This report lists net points earned by members. It can be especially useful for Store Night since it can be used by the Store Keeper as a worksheet to track the number of points spent, then returned to the Club Secretary for data entry.



To enter the number of points spent, select **Tools > Club Store** from the Main Menu bar.

### Report Dialog

**Report: Point List and Worksheet**

Description: A list of members and their net points. This report may be useful for Store Night because it can be used by the Store Keeper as a worksheet to track the number of points spent, and then returned to the Club Secretary for data entry.  
 Tip: Go to Tools > Club Store to enter the number of points spent.

**Selection Criteria:**  
 Club Name: (All Clubs)  
 Team Name: (All Teams)  
 Member Type: Clubber  
 Member Status: (All Statuses)  
 Member Code: (blank = all codes)

**Group By:**  
 <none>  
 Club Name

**Sort By:**  
 First Name  
 Last Name

**Options:**  
 Print each Group on a separate page

Print Preview Close

**Example Output**

Point Listing as of 11/20/2014 (All Statures) Clubbers		(All Clubs)		ASC Awana Club 4917 Example Street Madison, WI 53714	
Name	Total Points	Spent	Name	Total Points	Spent
Cubbies			T&T Adventure		
Arlington, Charity	55	---	Andrew, Brian	120	---
Arlington, Douglas	75	---	Brackenhelmer, Kati	110	---
Elliot, Caleb	50	---	Bunker, Samantha	140	---
Robertson, Bridgette	60	---	Carson, Christina	135	---
Selden, Sara	35	---	Dixon, Myra	145	---
Journey			Ekston, Lucas	270	---
Baker, Chaz	35	---	Farmer, Jonah	115	---
Clark, Einar	115	---	Farmer, Marjorie	110	---
Douglas, Janetta	70	---	Jones, Jeremy	110	---
Green, Ginger	40	---	Rausch, Diane	95	---
Harmon, Dan	35	---	Robertson, Tanya	160	---
King, Stephis	40	---	Selden, Sawyer	50	---

**16.23 Receipts Report**

This report provides a listing of Payments grouped by Date Received and Type. The Report Summary shows how much was applied to Dues related Fees versus all other Fees. It also includes amounts for Offerings/Donations.



This report can be useful to the Treasurer to account for monies received.

**Report Dialog**

**Report: Receipts Report**

Description: A listing of Payments grouped by Date Received and Type. The Report Summary shows how much was applied to Dues-related Fees versus all other Fees.

Tip: This may be useful as a report to the Treasurer to account for monies received.

Report Type

Summary (no Payment records are listed, just the Report Summary is shown)

Detail (each Payment is listed and grouped by Date Received and Type)

Selection Criteria

Select Payments received within the date range specified:

From: 9/19/2018 To: 9/19/2018

Print Preview Close

**Example Output**

**Report Type: Summary**

Receipts Report		ASC Awana Club 4917 Example Street Madison, WI 53714	
Payments received from 9/4/2013 to 9/25/2013			
Report Summary for 9/4/2013 to 9/25/2013			
Sum of Actual <sup>1</sup> Payments and Offerings:	Amount	Unapplied	Notes
Payment Information	\$35.00	\$0.00	
4 payment records in total	\$35.00	\$0.00	
4 actual <sup>1</sup> payments received	\$35.00	\$0.00	
Distribution of Actual <sup>1</sup> Payments Received:			
Amount applied to Dues	\$35.00		
Amount applied to Books, Uniforms and other non-dues related Fees	\$0.00		
Offerings/Donations Received:			
Fund ID	Offering/Donation Fund Name	Amount	
2	Missions	\$5.25	
		\$5.25	

<sup>1</sup>Actual payment records are those that represent money received. This includes "Interest" and "Discount" payment types since those represent uncollectible amounts allocated to the church.

Note: Offering/Donation amounts are tracked separately from payment records.

### Report Type: Detail

Receipts Report						ASC Awana Club 4917 Example Street Madison, WI 53714	
Payments received from 9/4/2013 to 9/25/2013							
9/4/2013							
Cash							
ID	Household	Type	Ref	Amount	Unapplied	Prior	Note
4729	Alan - David, Mikayla, Do	Cash		\$0.50	\$0.00		
4724	Clark - Penny	Cash		\$17.00	\$0.00		
4731	Maretti - Anna, Michael	Cash		\$17.00	\$0.00		
4727	Thomas - Miranda	Cash		\$0.50	\$0.00		
				4	\$35.00	\$0.00	
				4	payment records for 9/4/2013	\$35.00	\$0.00
Report Summary for 9/4/2013 to 9/25/2013							
Sum of Actual <sup>1</sup> Payments and Offerings:				\$40.25			
Payment Information							
				Amount	Unapplied	Notes	
4 payment records in total				\$35.00	\$0.00		
4 actual <sup>2</sup> payments received				\$35.00	\$0.00		
Distribution of Actual <sup>2</sup> Payments Received:							
Amount applied to Dues:				\$35.00			

## 16.24 Registration Form

This report creates blank or pre-filled forms for registering clubbers and/or leaders for a new club year.



Customize options under [Admin > System Settings > Options > Registration Form](#).



If printing pre-filled registration forms for a new club year, run the New Year Setup first.



On the report dialog under Options, choose a custom report title for VBS, Camp or other registration.

### Report Dialog

### Example Output

#### Pre-filled Clubber Registration Form

Awana Clubber Registration		-- CONFIDENTIAL --		ASC Awana Club 4917 Example Street Madison, WI 53714					
Club Year: 2013-2014		- Please Print -							
Instructions: Please review the following information for accuracy and make changes as needed. You may use the backside of this form if you need more room to write.									
Allan - Jack, Janice, Trevor, Jaqueline		Phone / E-Mail Address		Contact Person					
Parent(s): Mr and Mrs Allan		Cell Phone (000) 855-8555		Jack					
Address: 41 Richmond Circle		Cell Phone (000) 855-8555		Janice					
Madison, WI 53714		E-mail							
Home		Emergency							
Church: East Madison Baptist Church		Home Phone (000) 878-8787		Jack or Janice					
Persons (other than parents) authorized to pick up the child:		Work Phone							
Register	Child's Name	Nickname	Birth Date	Gender	Grade	School	Club	Need Book	Need Uniform
<input type="checkbox"/>	Jaqueline Allan		11/23/2007	Female	K		Seaside Ave	01	01
<input type="checkbox"/>	Trevor Allan		3/19/2006	Male	2		Seaside Ave	01	01
Clubber: Doctor Name and Phone		Dentist Name and Phone		Allergies / Meds / Special Needs					
Trevor									

### Pre-filled Leader Registration Form

AWANA Leader Registration Form - Pre-filled example with contact information for Mr. Jack Allan and service history table.

## 16.25 Review and Extra Credit Report

This report provides information about progress in Review/Extra Credit sections of current handbook(s).

### Report Dialog

Report: Review and Extra Credit Status dialog box showing selection criteria and options for generating the report.

### Example Output

Clubber Name	Book Name	Section Group	Last Section Completed On	# Sections Completed	% Completed
<b>T&amp;T Boys</b>					
Allan, Trevor	Discovery of Grace	Gold 1	9/30/2020	4 of 5	80
		Gold 2	12/9/2020	6 of 7	86
		Gold 3	2/3/2021	4 of 7	57
		Mission: Pray & GO!	2/3/2021	14 of 26	54
		Silver 1	9/30/2020	4 of 5	80
		Silver 2	12/9/2020	6 of 7	86
<b>T&amp;T Girls</b>					
Blakemore, Yvonne	Discovery of Grace	Gold 1	10/7/2020	5 of 5	100
		Gold 2	12/9/2020	7 of 7	100
		Gold 3	2/3/2021	5 of 7	71
		Mission: Pray & GO!	2/3/2021	17 of 26	65
		Silver 1	10/7/2020	5 of 5	100
		Silver 2	12/9/2020	7 of 7	100
Carson, Christina	Discovery of Grace	Silver 3	2/3/2021	5 of 7	71
		Gold 1	9/30/2020	5 of 5	100

## 16.26 Visitor List

This report lists visitor information including name, date of the visit, club visited and the name of the member who brought the guest. There are three types of Visitor Reports:

1. List each member that brought a visitors they brought and the date of their visit.
2. List each visitor, followed by the member who brought them and the date of their visit.
3. List each club date and the total number of visitors (no member or visitor details).



## Report Dialog

**Report: Visitor List**

Description: A list of visitors including their name, date visited and the name of the members who brought them.  
 (Note: The Clubber List - Contact Information report contains a "Visitor follow-up option" and is well suited for that task.)

**Report Type**

1. List each member, followed by the visitors they brought and the date of their visit  
 2. List each visitor, followed by the member who brought them and the date of their visit  
 3. List each club date and the total number of visitors. (no member or visitor details)

**Selection Criteria**

Visited in Club Year: 2013-2014  
 Visited From: 9/4/2013 To: 9/25/2013

**The "Brought By" Member's**

Club Name: (All Clubs)  
 Team Name: (All Teams)  
 Member Type: Clubber  
 Member Code: (blank = all codes)

**Group By**

<none>  
 Date  
 Club Name  
 Date, Club Name  
 Date, Club Name, Team Color  
 Date, Club Name, Team Name

**Sort By**

First Name  
 Last Name

**Options**

Apply shading to alternating rows using this color: PaleTurquoise

Print Preview Close

## Example Output

### Report Type #1

**Visitor List** (All Clubs) ASC Awana Club  
 Clubbers who brought visitors from 9/4/2013 to 9/25/2013 4917 Example Street  
 Madison, WI 53714

Member Name	Grade	Visitor Name	Grade	Club Visited	Date Visited
Carson, Ben	6	Jenning, Sarah	6	T&T Challenge	9/4/2013
Easton, Lucas	3	Jones, Jeremy	5	T&T Adventure	9/25/2013
Easton, Lucy	6	Dixon, Myra	4	T&T Adventure	9/25/2013

Number of Members: 3      Number of Visitors: 4

Note: This Report Type 1 will include visitor names even if the visitor has been deleted.

### Report Type #2

**Visitor List** (All Clubs) ASC Awana Club  
 Visitors attending from 9/4/2013 to 9/25/2013 4917 Example Street  
 Madison, WI 53714

Visitor Name	Grade	Brought By	Grade	Club Visited	Date Visited
Dixon, Myra	4	Easton, Lucy	6	T&T Adventure	9/25/2013
Jenning, Sarah	6	Carson, Ben	6	T&T Challenge	9/4/2013
Jones, Jeremy	5	Easton, Lucas	3	T&T Adventure	9/25/2013

Number of Visitors: 3

Note: This Report Type 2 will not include the names of visitors who have been deleted.

### Report Type #3

**Visitor List Summary** (All Clubs) ASC Awana Club  
 Number of Visitors from 9/4/2013 to 9/25/2013 4917 Example Street  
 Madison, WI 53714

Date	Number of Visitors
9/4/2013	1
9/25/2013	3
<b>Total:</b>	<b>4</b>

# **Chapter**

---

**17**

## 17 The Inventory Module



The Inventory Module contains records for all items in the Awana Ministry Supply Catalog. It helps track supplies of books, uniforms, awards, store items, game supplies, etc. Setting re-order levels will help you add items to an Order when the quantity in stock gets low.



The Order is **not** automatically transmitted to Awana ordering. You will still need to submit it.

The Inventory page manages [Items](#) and [Orders](#). For an overview, see [Working with Inventory](#).

The screenshot shows the 'Inventory' tab in the software. The main area displays a table of items with the following columns: Item Number, Description, In Use, Mpk Item Number, Catalog Category, Base Club, Status, Notes, Pkg Qty, Cost, and Sell Price. The table lists various items such as Bible Study materials, Discussion Guides, and Essentials. The current view shows 1048 items.

Item Number	Description	In Use	Mpk Item Number	Catalog Category	Base Club	Status	Notes	Pkg Qty	Cost	Sell Price
14473	"His Love" Bible Study - ESV (2018)	<input checked="" type="checkbox"/>	14482	Curriculum	Trek			1	\$10.99	\$
14424	"His Love" Bible Study - KJV (2018)	<input checked="" type="checkbox"/>	14433	Curriculum	Trek			1	\$10.99	\$
14457	"His Love" Bible Study - NIV 1984 (2018)	<input checked="" type="checkbox"/>	14466	Curriculum	Trek			1	\$10.99	\$
14440	"His Love" Bible Study - NKJV (2018)	<input checked="" type="checkbox"/>	14449	Curriculum	Trek			1	\$10.99	\$
14601	"His Love" Discussion Guide - ESV	<input checked="" type="checkbox"/>		Leader Resources	Trek			1	\$10.39	\$
14577	"His Love" Discussion Guide - KJV	<input checked="" type="checkbox"/>		Leader Resources	Trek			1	\$10.39	\$
14593	"His Love" Discussion Guide - NIV 1984	<input checked="" type="checkbox"/>		Leader Resources	Trek			1	\$10.39	\$
14585	"His Love" Discussion Guide - NKJV	<input checked="" type="checkbox"/>		Leader Resources	Trek			1	\$10.39	\$
14521	"His Love" Essentials - ESV (2018)	<input checked="" type="checkbox"/>		Curriculum	Trek			1	\$8.99	\$
14497	"His Love" Essentials - KJV (2018)	<input checked="" type="checkbox"/>		Curriculum	Trek			1	\$8.99	\$
14513	"His Love" Essentials - NIV 1984 (2018)	<input checked="" type="checkbox"/>		Curriculum	Trek			1	\$8.99	\$
14505	"His Love" Essentials - NKJV (2018)	<input checked="" type="checkbox"/>		Curriculum	Trek			1	\$8.99	\$
14561	"His Love" Leader's Guide - ESV	<input checked="" type="checkbox"/>		Leader Resources	Trek			1	\$19.99	\$
14537	"His Love" Leader's Guide - KJV	<input checked="" type="checkbox"/>		Leader Resources	Trek			1	\$19.99	\$

### 17.1 Items



Click on the **Inventory > Items** tab to open, add, or delete inventory items.











The inventory is periodically updated, so it's unusual to need to add a new item. However, it could come in handy for adding an item not issued by Awana Clubs International.



For items that you don't use, use the search tool or filters to find them and mark them as Not In Use. (To speed up the process, [select multiple items](#) and mark them all with one action!)

This screenshot is identical to the one above, showing the 'Inventory' tab with a list of 1048 items. The table columns and data are the same as in the previous screenshot.

## Toolbar

Icon	Action	Description
	<b>Open Item</b>	Opens the selected item in the <a href="#">Inventory Item window</a> . (Pressing the <b>Enter</b> key with a row selected or double clicking the row also opens the inventory item.)
	<b>New Item (Ctrl-N)</b>	Opens the <a href="#">Inventory Item window</a> with blank/default values to create a new inventory item.
	<b>Delete Item(s) (Ctrl-D)</b>	Removes the selected item(s). We recommend not deleting items. Instead, set the item as being "Not in Use". Note: items used in curriculum or as awards may not be deleted.
	<b>Search Inventory</b>	Filters the grid to show only those items whose Description or Item # matches the search criteria entered in the text field. (Pressing the Enter key will also perform the search/filter.)
	<b>Show</b>	Filters the data in the grid based on <b>All Items</b> , <b>Items we use</b> , <b>Items we use and need to order</b> , or <b>Items we do not use</b> .
	<b>Add Item to Order*</b>	Adds the selected item to an open order. A new Order will be created if there is not one currently open.
	<b>Mark Item(s) as In Use*</b>	Marks the selected item(s) as one(s) that your Awana program uses.
	<b>Mark Item(s) as Not In Use*</b>	Marks the selected item(s) as one(s) that your Awana program does <i>not</i> use.
	<b>Set Expense Category*</b>	Sets the expense category for the selected item(s).
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.

\* These items are available from the **Action** drop-down menu on the Toolbar.

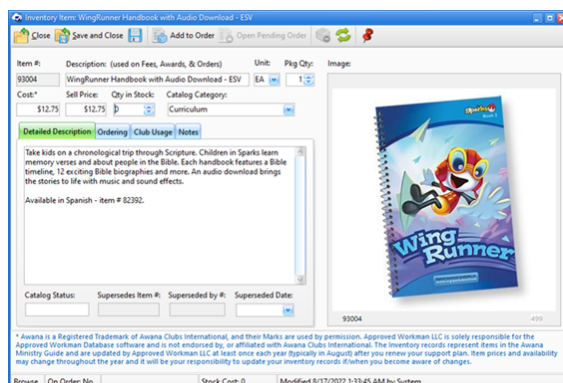


Many of the actions are also available through the right click pop-up menu.









### 17.1.1 The Inventory Item Window



Opening or creating an item opens the Inventory Item window to view, modify, or enter details.





## Toolbar

Icon	Action	Description
	<b>Close</b>	Closes the Item Window without saving current changes.
	<b>Save and Close</b>	Saves the changes and then closes the Item Window.
	<b>Save</b>	Saves the changes and leaves the Item Window open.
	<b>Add to Order</b>	Adds the selected item to an open order. A new Order will be created if there is not one currently open.
	<b>Open Pending Order</b>	Opens the relevant order if the item is On Order. The button is disabled if the current item is not On Order.
	<b>Delete Item(s)</b> (Ctrl-D)	Removes the item. We recommend not deleting items. Instead, set the item as being "Not in Use". Note: items used in curriculum or as awards may not be deleted.
	<b>Refresh</b>	Refreshes the data currently displayed in the Item Window.
	<b>Stay On Top</b>	Toggles whether or not the window stays on top of the main window.

## General Item Information

The general information is located above the tabbed panel and includes:

- **Item #** and **Description** - for items from Awana Clubs International, these fields match the Awana catalog. For custom items, set as desired. The search box works on these fields.
- **Pkg Qty** - number of items in a package. For example, if there are 5 in a package, an order of 1 of that item results in 1 package with 5 items in it. The default is set to 1.
- **Cost** - amount used when an item is ordered. It should match Awana's catalog price, if applicable.
- **Sell Price** - amount used when a fee is created.
  -  Consider slightly increasing the **Sell Price** of items like uniforms and books to cover shipping costs.
- **Qty in Stock** - number currently available. The default is 0. This value is adjusted automatically as items are depleted by [assigning books](#), when [awards are earned](#), or when [creating a fee](#) (such as for a book bag). It is increased when the items from an order are marked received.
- **Category** - drop-down list populated based on [Admin > System Settings > Generic Lookups > Inventory Categories](#).
  -  This is especially useful when [filtering](#) the Item grid.
- **Image** - for items from the Awana Catalog, the image is provided. For custom items, right click to paste or load an image from a file.

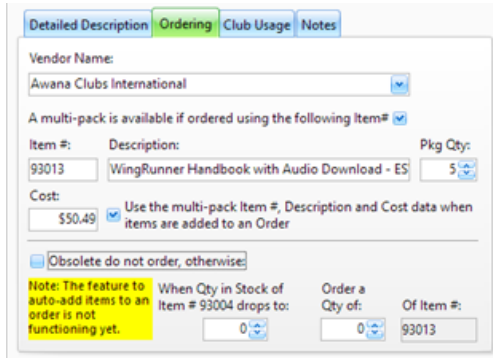
## Detailed Description

This tab provides a detailed description of the item. This will normally match the Awana Catalog.

Awana Clubs International periodically introduces new items that replace older items, making the older item obsolete. These inventory details are maintained during the annual inventory and curriculum update.

## Ordering

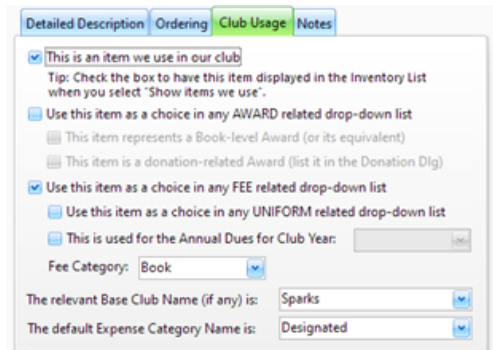
The **Ordering** tab provides information related to the ordering of the item.





- **Vendor Name** - selections are determined by [Admin > System Settings > Generic Lookups > Vendors](#).
- **A multi-pack is available if ordered using the following Item #** - indicates a multi-pack should be ordered instead of single items, when available. Detail fields for the multi-pack are enabled when the option is selected.
- **Obsolete do not order** - indicates an item is no longer available. When checked, the fields below it are disabled.
- **When Qty in Stock of Item # is:, Order a Qty of:** - for items that are not obsolete, these fields indicate when the item should be added to an order and how many to order. [This does not happen automatically at this time. In the meantime, set the values and use the filter on the Items grid to Show: **Items we use and need to order.**]

## Club Usage


The **Club Usage** tab includes information on if and how an item is used in your club.




- **This is an item we use in our club** - indicates the item is one you use.
  -  Items can also be marked as 'in use' or 'not in use' on the Main Inventory Items grid by selecting items and using the **Action** menu or right click pop-up menu. [Multi-selecting records](#) speeds up the process.
- **Use this item as a choice in any AWARD related drop-down list** - indicates the item will be included in any drop-down list used for choosing awards. When checked, selection of a **Book-level Award** or **Donation-related Award** can also be indicated.
- **Use this item as a choice in any FEE related drop-down list** - indicates the item will be included in any drop-down list used for choosing fees, such as the [Fee dialog](#).
- **Use this item as a choice in any UNIFORM related drop-down list** - indicates the item will be included in any drop-down list used for choosing uniforms, such as the [Assign Uniform](#) dialog.
- **This is used for the Annual Dues for Club Year:** - indicates payments for dues for the specified year should go towards this item.


 The Fee for dues is generally added during an update so it is not necessary to add it manually.

- **The relevant Base Club Name (if any) is:** - indicates the club that generally uses the item.

 This is especially useful when [filtering](#) the Item grid.

- **The default Expense Category Name is:** - selection options are determined by [Admin > System Settings > Generic Lookups > Expense Categories](#).


 This helps in [filtering](#) and/or [grouping](#) Fee and Line Item records to get Expense Category totals.


 The expense category can also be set on the Main Inventory Items grid by selecting item/s and then using the **Action** drop-down, or the right click pop-up menu.


## Notes

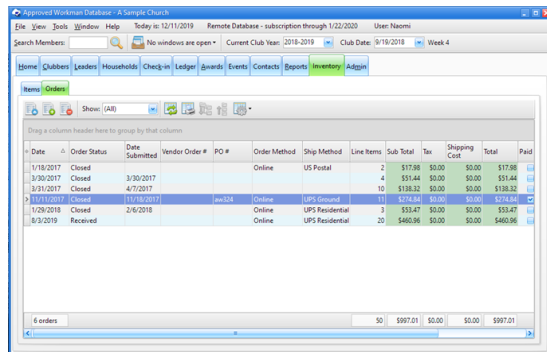
Use this area to track any additional information related to the item.

## 17.2 Orders





 The **Inventory > Orders** tab tracks past orders, allows creation of new orders, and modification of "Open" orders. The grid's footer shows details about orders placed, items ordered and money spent on all orders. [Also, amount spent on shipping. (There's an eye-opener!)]

 By managing your inventory closely, you can be proactive with orders, reducing the number of orders and thus saving a significant amount on shipping over a club year.

 Creating an order in the Windows App does not actually place the order with Awana Clubs International. It is only a tool to help in the process.



Date	Order Status	Date Submitted	Vendor Order #	PO #	Order Method	Ship Method	Line Items	Sub Total	Tax	Shipping Cost	Total	Paid
1/18/2017	Closed				Online	US Postal	2	\$17.98	\$0.00	\$0.00	\$17.98	
3/30/2017	Closed	3/30/2017			Online	US Postal	4	\$31.44	\$0.00	\$0.00	\$31.44	
3/31/2017	Closed	4/7/2017			Online	US Postal	10	\$193.32	\$0.00	\$0.00	\$193.32	
1/11/2017	Closed	11/15/2017	jav04		Online	UPS Ground	11	\$248.04	\$0.00	\$0.00	\$248.04	
1/20/2018	Closed	2/6/2018			Online	UPS Residential	3	\$32.47	\$0.00	\$0.00	\$32.47	
6/3/2019	Received				Online	UPS Residential	30	\$460.96	\$0.00	\$0.00	\$460.96	
4 orders								\$0	\$997.01	\$0.00	\$0.00	\$997.01

Icon	Action	Description
	<b>Open Order</b>	Opens the selected order in the <a href="#">Order window</a> . (Pressing the <b>Enter</b> key with a row selected or double clicking the row also opens the order.)
	<b>New Order (Ctrl-N)</b>	Opens the <a href="#">Order window</a> with blank/default values to create a new order.
	<b>Delete Order (Ctrl-D)</b>	Removes the selected order.
	<b>Show</b>	Filters the data in the grid based on Club Year. Defaults to the current club year but can be changed.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.

## 17.2.1 The Order Window



Opening or creating a new Order opens the Order window to view, modify, or enter details of an order.



Creating an order within the Windows App does not actually place the order with Awana Clubs International, but can assist in [placing the order](#).

### Toolbar

Icon	Action	Description
	<b>Close</b>	Closes the Order Window without saving current changes.
	<b>Save and Close</b>	Saves the changes and then closes the Order Window.
	<b>Save</b>	Saves the changes and leaves the Order Window open.
	<b>Delete Order</b>	Removes the current Order.
	<b>Print Preview</b>	Displays the order in a format appropriate for e-mailing or faxing to Awana Clubs International. It uses the information under <a href="#">Admin &gt; Club Info &gt; Supply Order - Default Values</a> page. Printing is done from the Preview window.
	<b>Edit Contact Info</b>	Opens a dialog to edit the Contact and Ship To information <i>for this order</i> which will override the <a href="#">Admin &gt; Club Info &gt; Supply Order - Default Values</a> .
	<b>Refresh</b>	Refreshes the data currently displayed in the Order Window.
	<b>Stay On Top</b>	Toggles whether or not the window stays on top of the main window.

### Order Information

The general information about the order is located just below the toolbar and includes:

- **Club Year** - defaults to the current club year but can be changed. The Inventory's Order grid can be filtered on the **Club Year** to list only orders within the selected club year.
- **Order Date** - defaults to the current date but can be changed.
- **Purchase Order, Order Method, Shipping Method, Vendor Order #, Invoice #** - details for the order.




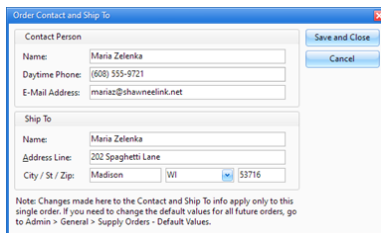
The **Shipping Method** values are customizable under [Admin > System Settings > Generic Lookups > Shipping Methods](#). Set a default for the **Order Method** and the **Shipping Method** under [Admin > Club Info > Supply Order - Default Values](#).



- **Order Status** - defaults to **Open** when a new order is created. Options include: **Open, Submitted, Received, or Closed**. The status determines what functionality is available. See the Line Items section below for details on changes based on status.
- **Submitted** date - set automatically when **Order Status** set to **Submitted**, but can be changed.
- **Comments** - notes to print on the order form. This is useful if the order is mailed or e-mailed.
- **Invoice Paid** - indicates the invoice was paid. Enter additional details under **Payment Reference**.
- **Notes** - additional information related to the order that does not need to be printed on the form.
- **Sales Tax** and/or **Shipping/Handling** - enter amount(s). The **Total** is automatically calculated.

### Contact and Ship To Information









 The default Contact and Ship To information used on most orders should be set under [Admin > Club Info > Supply Order - Default Values](#). To use different contact and shipping information on the current order, click **Edit Contact Info** to display a dialog for setting those values.



### Line Items

 The line item grid behaves differently depending on the **Order Status** value as follows:

1. **Open** - indicates the order has not yet been placed. This is the default when the order is created. Line items can be added to the order. Each item should have a line item entry in the grid. The following tools are used while the Order is Open to add the line items:

Icon	Action	Description
	<b>New Line Item</b>	Creates a new row. Select from the drop-down list or type an <b>Item Number</b> or <b>Description</b> . Update the <b>Expense Category</b> and <b>Qty Ordered</b> fields if needed. <b>Line #, Pkg Qty, Cost, and Extension</b> are filled automatically.  The <b>Item Number</b> or <b>Description</b> must exist in the Inventory. The list filters as you type. If no match is found, a Warning dialog appears.  Changing the <b>Cost</b> value in the line item changes the <b>Cost</b> in the Item's record also!
	<b>Save Line Item</b>	Saves the changes to the Line Item.
	<b>Delete Line Item</b>	Removes the selected Line Item from the Open Order.
	<b>New Inventory Item</b>	Opens a blank <a href="#">Inventory Item Window</a> to create a new item if an item does not exist that needs to be added to an order. Once the item is created, then click the <b>New Line Item</b> button to add it to the order.
	<b>Open Inventory Item</b>	Opens the selected item in the <a href="#">The Inventory Item Window</a> in order to see more details.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.

- Submitted** - indicates the order has been placed. Setting this status fills in the **Submitted date**. It prevents line items from being added, changed or deleted.
- Received** - indicates the order has arrived. This status adds **Rcvd**, **Qty Rcvd** and **Qty on B/O** (Quantity on back order) columns to the grid. As an item is marked **Rcvd**, the **Qty Rcvd** defaults to the Qty Ordered and the **Qty on B/O** defaults to zero. For back ordered items, update the values. As Line Item records are posted, the quantity received is added to the **Item's Qty in Stock**.



Inventory item cost values are updated when the Cost field for a Line Item on the Order Form is changed. To adjust a cost while checking in received orders, make the correction on the line item and the Inventory Item record will be updated with the new cost.

Line #	Base #	Item #	Description	Expense Category	Pkg Qty	Rcvd Qty	Qty Ordered	Qty Rcvd	Qty on B/O	Cost	Extension
16	Awards	79556	Excellence Award and Pin	General	1	13	13	0	0	\$10.59	\$137.67
17	Sparks	74392	Sparky Award Plaque and Award Pin	General	1	7	7	0	0	\$10.99	\$76.93
18	Truth Tr.	48999	T&T Church Attendance Stickers	Designated	1	2	2	0	0	\$1.99	\$3.98
19	Truth Tr.	80531	T&T Ultimate Challenge Book One - NKJV	Designated	1	3	0	0	0	\$15.75	\$47.25
20	Cubbies	11075	AppleSeed Trail Emblem	Designated	5	1	0	1	1	\$6.99	\$6.99
21	Sparks	77981	WingRunner Handbook with Audio Download	Designated	1	1	0	1	1	\$10.99	\$10.99
										\$132.76	\$412.97

- Closed** - indicates everything related to the order is completed. Setting this status prevents the line items from being modified.

### Expense Categories

The Expense Category field identifies a budget category for each item. The default value is based on the corresponding [Inventory Item](#) record's **Expense Category** value, but can be changed in the Line Items grid. The selection options are determined by [Admin > System Settings > Generic Lookups > Expense Categories](#).



To quickly get a total of how much is being spent on an order from various budget categories, drag the Expense Category column header into the [grouping](#) area above the grid. (Note: If the Group By box isn't showing, click the [Grid button](#) in the toolbar and select "Show Group by box".)

# **Chapter**

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**18**

## 18 The Admin Module

Since there are many ways to run an Awana Program, there are many ways to customize the Windows App. The Admin Module provides lots of customizing options. Be sure to explore each tab!

The screenshot shows the Admin Module interface with a table of club information. The table has columns for General, Session Info, Dues, and Point Yr. The data rows are as follows:

Club Name	Logo	Meeting Day	Starting Date	Ending Date	# of Weeks	Weekly Amount	Annual Amount	Attend Club	Attend Church	Uniform	Bible	Book	Dues Pd	Visitors
Awana		Wednesday	8/31/2022	5/17/2023	38	\$5.00	\$16.00	10	10	5	5	5	0	20
Cubbies		Wednesday	8/31/2022	5/17/2023	38	\$5.00	\$16.00	10	10	5	5	5	0	20
Sparks		Wednesday	8/31/2022	5/17/2023	38	\$5.00	\$16.00	10	10	5	5	5	0	20
T&T Girls		Wednesday	8/31/2022	5/17/2023	38	\$5.00	\$16.00	10	10	5	5	5	0	20
T&T Boys		Wednesday	8/31/2022	5/17/2023	38	\$5.00	\$16.00	10	10	5	5	5	0	20
Trek		Wednesday	8/31/2022	5/17/2023	38	\$5.00	\$16.00	10	10	5	5	5	0	20

- **Club Info** - pages for Club and Church Info, Local Awana Missionary, Supply Orders, and Notes
- **Club Setup** - overview of Club Names, Logos, Dues and Points; Club Calendar; Club Assignments and Grade Assignments. The New Year Setup process creates the Club Calendar records. Themes, Offering Funds, and Notes for each week can be set under the Club Calendars tab.
- **Users** - user accounts for all persons who are given access to the database
- **System Settings** - global setting options for:
  - **Generic Lookups** - custom values used in many drop-down lists throughout the application
  - **Awards** - settings for Book, Attendance, Event, Leadership Service, and Journey Pin award triggers
  - **Options** - customizable settings that affect how the database works in a variety of situations
  - **Curriculum** - details for all [generic handbooks](#) including specific Section Group Awards

### 18.1 Club Info



The Club Info tab includes information about your Church, Awana program, and Local Awana Missionary, the default values of Supply Orders and a place for Notes. Some of the information is for reference purposes only. The fields in these tabs are pretty self-explanatory.

#### Club and Church Info

The church's contact information given on this page is used when generating reports and creating orders.

The screenshot shows the Club and Church Info form with the following fields:

- Church Name\*: A Sample Church
- Club Name: ASC Awana Club
- Pastor Name: Mike Farmer
- Commander Name: Thaddeus Zelenka
- Address Line 1: 4917 Example Street
- City / State / Zip: Madison WI 53714
- Phone Number: (608) 222-2255
- E-Mail Address: [Empty field]

## Local Awana Missionary

The Awana Missionary information is for reference.

## Supply Order - Default Values

This information is used when creating [orders](#) from the Inventory Module.

## Notes

This page is for keeping any additional or miscellaneous information you need to track.

## 18.2 Club Setup



To setup a new club year, follow the instructions in the [New Year Setup](#) section before continuing here. Once the new year is setup, or if adjustments need to be made in the middle of a club year, continue to follow the instructions below. Each section below describes a Club Setup tab.

### Club Names, Logos, Dues and Points

This tab provides an overview of the settings for each club. It displays the General club information, such as specific Club Names and Logos; Session Info, such as Starting and Ending Dates; Dues Info, both Weekly and Annual amounts; and Point Values for check-in categories and handbook sections. Edits can be made directly in the grid.



Make sure the correct new **Club Year** is selected in the main toolbar and in the Club Setup Tab.

General		Session Info		Dues		Point Values													
Club Name	Logo	Meeting Day	Starting Date	Ending Date	# of Weeks	Weekly Amount	Annual Amount	Attend Club	Attend Church	Uniform	Bible	Book	Dues Pd	Visitors	Bonus	Offering	Custom_1	Custom_2	Ra
Awana		Wednesday	8/31/2022	5/17/2023	38	\$0.00	\$0.00	0	0	0	0	0	0	0	0	0	0	0	0
Cubbies		Wednesday	8/31/2022	5/17/2023	38	\$0.50	\$16.00	10	10	5	5	5	0	20	15	5	5	5	5
Sparks		Wednesday	8/31/2022	5/17/2023	38	\$0.50	\$16.00	10	10	5	5	5	0	20	15	5	5	5	5
T&T Girls		Wednesday	8/31/2022	5/17/2023	38	\$0.50	\$16.00	10	10	5	5	5	0	20	15	5	5	5	5
T&T Boys		Wednesday	8/31/2022	5/17/2023	38	\$0.50	\$16.00	10	10	5	5	5	0	20	15	5	5	5	5
Trek		Wednesday	8/31/2022	5/17/2023	38	\$0.50	\$16.00	10	10	5	5	5	0	20	15	5	5	5	5
Journey		Wednesday	8/31/2022	5/17/2023	38	\$0.50	\$16.00	10	10	5	5	5	0	20	15	5	5	5	5
Puggles		Wednesday	8/31/2022	5/17/2023	38	\$0.50	\$16.00	10	10	5	5	5	0	20	15	5	5	5	5

The **General** header band contains the following information:

- Club Year - matches the selection in the toolbar (may initially be [hidden](#))
- Club Name - Click in the cell to edit it. When the change is saved, all records using the old club name will be updated to the new name.



Keep club names brief so they will be easier to read in the narrow columns of the grids.

- Base Club - used to determine default options when assigning books and uniforms
- Logo - personalize the logos by copying any image into clipboard memory then pasting it in the image cell or by loading an image file. To activate the image pop-up menu, first click in an image cell, then follow with a right click in the same cell.
- Logical Order - numeric value to ensure that club names are sorted in logical order rather than alphabetical. (Most users prefer a logical order of: Puggles, Cubbies, Sparks, T&T, Trek, Journey, instead of: Cubbies, Journey, Puggles, Sparks, Trek, T&T.)
- Club Status - most clubs will be active, but in some situations, a club may become inactive mid-year
- Room Location - room number or location where the club meets for handbook time.

The **Session Info** header band includes details from the New Year Setup process. It is displayed as read only and includes: **Meeting Day, Starting Date, Ending Date** and **# of Weeks**.

The **Dues** header band includes the following:

- **Weekly Dues Amt** - default amount applied to dues when the Check-in grid's Dues Paid check box is marked.
- **Annual Dues Amt** - default amount for a new Fee record representing Annual Dues.



A new Annual Dues fee record is created automatically when a clubber's [Registration becomes current](#) or when a Dues Paid check box is checked the first time.



If dues are NOT collected, enter "\$0.00" for both weekly and annual dues. If dues ARE collected, but there are no weekly dues, [hide](#) the **Dues** header band on the [Check-in Module's Attendance grid](#) so it does not cause confusion and take up valuable space.

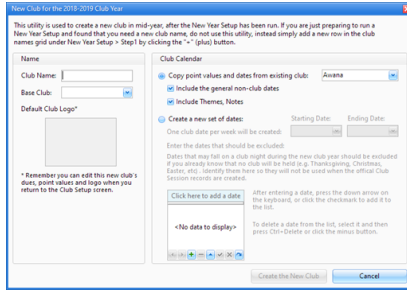
The **Point Values** header band handles point setting for the following: **Attending Club, Attending Church (or Sunday School)**, wearing a **Uniform**, bringing a **Bible**, bringing a **Handbook**, paying **Weekly Dues**, bringing **Visitors**, giving an **Offering**, earning a **Bonus**, two **Custom** fields, and completion of **Required Sections** or **Extra Credit sections**. These values are credited to a member when the various items are marked (in the [Check-in module](#) or the [Attendance](#) tab or [Handbooks](#) tab of the Member record).

### Actions

- **Save** - saves changes and applies them to the database. Be sure to click this to save changes!!
- **New Club** - for mid-year club additions; opens the New Club dialog:



If you are just preparing to run a New Year Setup and need to create a new club name, do not use this dialog. Instead, add a new row in the club names grid in [New Year Setup](#) > **Step 1**.



Under the **Name** section, enter the new **Club Name** and select the appropriate **Base Club**.

Under the **Club Calendar** section, choose to:

- **Copy point values and dates from an existing club**, with additional options for **including non-club dates** and/or **include Themes, Notes**
- **Create a new set of dates:** enter **Starting / Ending** dates and **dates to be excluded**.
- **Delete Club** - Removes the selected club.

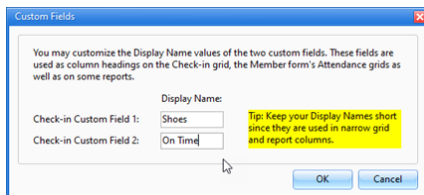


A club may only be deleted if no members are assigned to it.

- **Edit custom Fields** - The fields labeled "Custom1" and "Custom2" can be defined specifically for your club for use on the Check-in grid and the Check-in and Progress Report Worksheet. Open the Custom Fields dialog to set the Display Names for these columns.

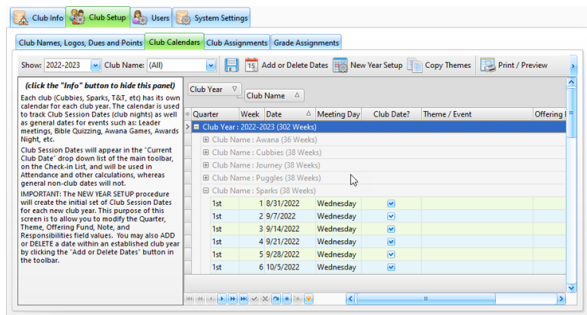


Keep the display names short since they are used in narrow grid and report columns.

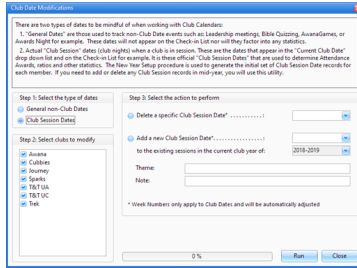


## Club Calendars

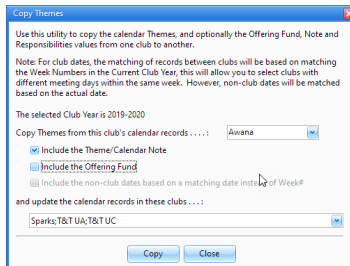
Use this page to review and edit each club's calendar for the current club year.



- To access a particular club's calendar, click **+** next to **Club Year** and then click **+** next to the desired **Club Name**. Each club has its own calendar for each club year.
- **Quarter, week, date, meeting day, club date or non-club date** - only the Quarter can be edited. Initial Club Session Dates are created by the [New Year Setup](#) procedure. To **Add or Delete Dates**, use the button in the toolbar to open the Club Date Modifications dialog:



- **Theme/Event** - relevant to the specific date. Click in the cell and type the details. If multiple clubs use the same themes, enter the themes for one club (such as the standard "Awana" club), then click **Copy Themes** on the toolbar to open the **Copy Themes** dialog:



Choose a club to **Copy Themes from**; optionally include **Theme/Calendar Note**; **Offering Fund**; and/or **non-club dates**, then choose the club(s) to **update the records**.

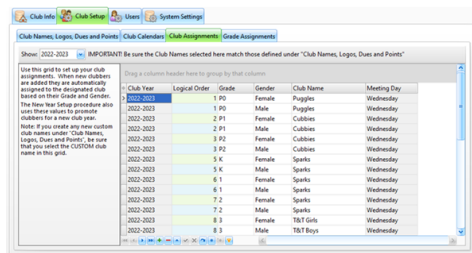


The Copy button is disabled until club names are selected to copy from and copy to.

- **Offering Fund** - indicates the designated use of offerings for the specific date, such as: Missions, Adopt-a-Club, Scholarships, etc. Make the [column visible](#) on the [Check-in module's Attendance grid](#) and any money entered will be credited to the particular fund designated for the given week.
- **Note** - any additional information

## Club Assignments

This tab shows the records the database uses when automatically assigning clubbers to a club based on grade and gender. These are defaults. A club assignment can be changed in the individual's member record.

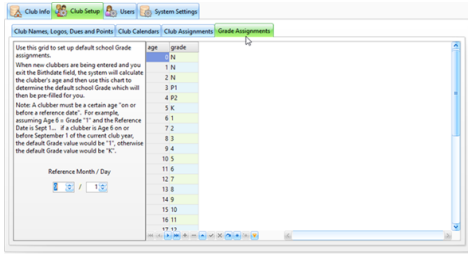


- If a gender or grade has been incorrectly associated to a specific club, click the cell under the **Club Name** column and select the correct club name from a drop-down menu.

## Grade Assignments


Use this page to assign default grades based on a clubber's age. The grade assignments are the defaults. A clubber's grade can be changed on the member's record.





- **Reference Month / Day** - serves as the "cutoff point" for each grade division. The member must be the age specified in the grid by the reference month/day to be assigned to the listed grade.
- **Grade** - default grade assignment for a clubber with the specified age.

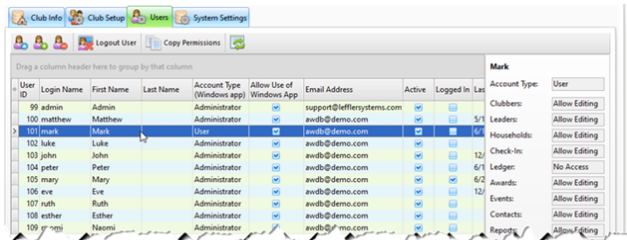
### 18.3 Users








 The Users tab manages the names and account information of those authorized to access the cloud database. The first admin user is created during the initial setup process. Additional user accounts can then be added.

We recommend creating user accounts for each individual person who needs access to the database. Specific permissions can (and should) be set for each user. Each user can select a unique style (skin) and have saved [customized grid layouts](#). Most records are user time-stamped when they are created and/or modified. Having separate user accounts for each person provides a way to investigate changes made to the data.



Do NOT use generic user accounts that are shared by more than one person. Users could overwrite other user's settings and grid layouts. You will also lose valuable information related to creation and modification of records.



<u>Icon</u>	<u>Action</u>	<u>Description</u>
	<b>Open User</b>	Opens the selected user in the User Account dialog. (Pressing the <b>Enter</b> key with a row selected or double clicking the row also opens the user record.)
	<b>New User (Ctrl-N)</b>	Opens the User Account dialog with blank/default values to create a new user.
	<b>Delete User (Ctrl-D)</b>	Removes the selected user.  There must always be at least one active admin account. Trying to remove the last one will result in a reminder.  Instead of deleting user accounts, we recommend setting the <b>Active Status</b> to <b>No</b> to preserve historical user timestamps.
	<b>Log User Out</b>	Logs the selected user out of the database.
	<b>Copy Permissions</b>	Opens the Copy Permissions dialog to use the permissions from one user account to update the values of another user account.

## User Account dialog

Creating a new User record or opening an existing record opens the User account dialog.

The following fields are shown on the Main tab:

- **User First Name, User Last Name, Email address** -
- **User ID** - a system assigned ID. This is a read-only field.
- **Email Separator** - determines the separator to use between e-mail addresses during the [Gather E-mail Addresses and Textible Phone Numbers](#) procedure. Choose semicolons or commas.
- **User Login Name** - name used to log in. We strongly recommend using the person's First Name for this. Generic names like "commander", "sparks", or "FBC" should **NOT** be used. The User Name is not case-sensitive so "Matthew" is the same as "matthew" as far as the log in screen is concerned.
- **Password** - password for the user to log in. The password IS case-sensitive, so "PassWord" is not the same as "password" to log in. Whatever the password is set to here, the exact same value must be entered on the log-in screen. **Don't use "awana" for your password, everybody guesses that one!**
- **Confirm Password** - confirmation of the password entered above.
- **Allow use of this Windows App** - if unchecked, this user will only be able to use the Web App.
  - ⚠️ Permission to "Allow use of the Windows App" can also be set in the Web App. For User accounts created in the Web App that allow access to the Windows App, default permissions for the modules will be set but should be updated on the Permissions tab of the User record in the Windows App.
- **Account is Active** - indicates the status of the user account. If a user no longer needs access to the database, instead of deleting the account, clear the box.
- **Inactive Date** - date the account became inactive.
- **Note** - any additional information or notes related to the user account.

The following fields are shown on the Permissions tab:

- **Account Type** - determines access to the database. Select "Administrator", "Kiosk" or "User" from the drop-down list. An "Administrator" has full access to every screen and function, including System Settings. A "Kiosk" account can only access the [Kiosk screen](#). A "User" account allows setting specific permission for each Module. All users can change their own passwords by selecting [Tools](#) > **Change Password** from the Main menu bar.

- **Modules** - lists each module in the Windows App. For the main modules, set permission to **Allow editing** or **No Access**. Under the Administration module, set permissions to **Allow editing, Read Only,** or **No Access**. (Access to System Settings is only available to Administrators.)



The selected setting impacts the availability of numerous tabs, drop-down lists and pop-up menu items throughout the system. If an item is disabled for a user, adjust the permissions.



Permissions for the individual modules can only be set when the Account Type is User. Administrators have access to everything. Kiosk users are limited to Check-in items in [Kiosk Mode](#).



Under the Administration module, Club Info, Club Setup, and Users permissions will apply to the Web App and the Windows App. All other permissions only apply to the Windows App. Permissions relating to the Web App need to be set in the Web App.

## 18.4 System Settings

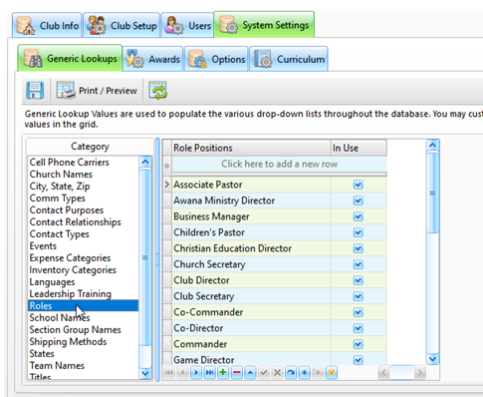
The System Settings tab includes options and settings for the database that apply to ALL users. The System Settings are only available to an Administrator. The tabs include:

- [Generic Lookups](#) - set custom values for drop-down lists throughout the database
- [Awards](#) - set custom awards for Book completion, Attendance at Club and Church/SS, Event participation, Leadership Service recognition, and Journey Pin requirements
- [Options](#) - customize settings for how the database works when entering Members, performing Check-In, using the Registration Form and Reports, as well as setting Misc. defaults and values for collection of Fees and Dues
- [Curriculum](#) - view all information for the [generic handbooks](#) and customize details including specific Section Group Awards or Required status of specific sections

### 18.4.1 Generic Lookups



The Generic Lookups tab contains a list of categories of drop-down lists used throughout the Windows App. Select a category on the left to display the selection options on the right.



- Use **Click here to add a new row**, or the **'+' (plus)** below the grid, for a new record. In the blank row, type the new value then press **Enter** or click the **checkmark** at the bottom of the grid.
- Use the **'-' (minus)** below the grid to remove a record. Click **OK** to confirm deletion.
- To modify a record, select the value and type the new value. Press **Enter** or use the **checkmark** to accept the changes. Use the **'X'** to cancel the changes.

## 18.4.2 Awards

The various Awards tabs indicate the awards that trigger for handbook completion, or by attendance or event participation. These generally don't need to be modified. In the rare case that updates are needed, follow the instructions below.

If an award item isn't in the drop-down list, [open the corresponding item](#) in the Inventory Module and ensure the **Use this item as a choice in any AWARD related drop-down list** is selected. Also, if needed, select **This item represents a Book-level Award** below that.

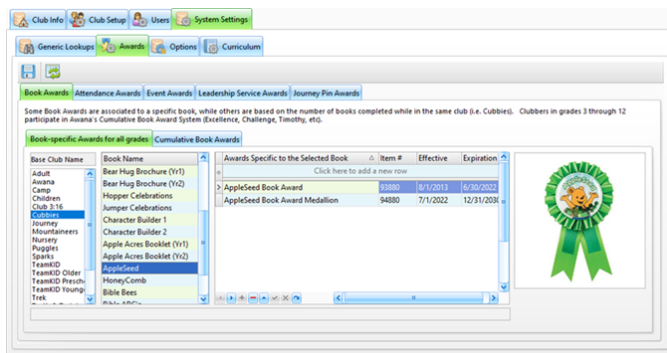
If your club gives awards that are different than those purchased from Awana Clubs International, add those items to the inventory, then refer to them as instructed below.

### Book Awards

This tab manages the awards that members earn when a handbook is completed. Some book awards are associated with a specific book, while others are based on the number of books completed.

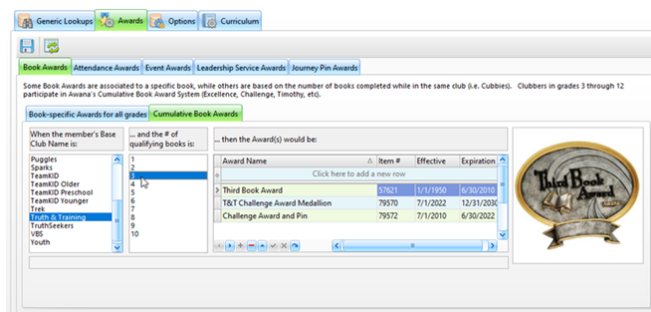
#### Book-specific Awards for all grades

This tab manages awards that are related to a specific handbook. For each **Base Club** selected, the associated books are listed. When a **Book Name** is selected, the associated awards are displayed. Use the buttons below the grid to add, remove or modify these awards.



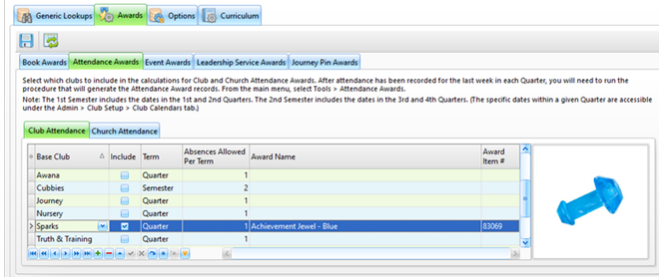
#### Cumulative Book Awards

When a book award is not associated with a particular book, but with *how many* books have been completed, the award association should be done on one of these pages. Select the **Club Name** and **# of qualifying books** then add, remove, or modify the awards in the grid on the right.



### Attendance Awards

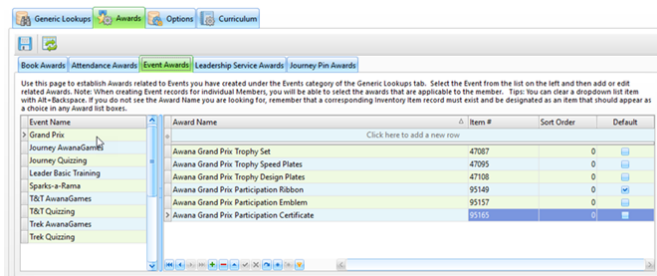
This tab manages the awards given to clubbers when they attend Awana or Church consistently. The awards are generated by using [Tools > Attendance Awards](#) from the Main Window's menu bar. The grids in both the **Club** and **Church** tabs work the same way but refer to different awards.



- Check the box next to each **Base Club** to **Include** it in the calculations for Attendance Awards.
- Club Attendance awards are normally given Quarterly and Church Attendance awards are given per Semester (every two quarters), but the **Term** can be changed as needed.
- Set the number of **Absences Allowed Per Term**.
- Select an **Award Name** from the drop-down list by scrolling or typing the name. The **Award Item #** will be filled in automatically.
- Clubs can be added or removed by using the buttons below the grid.

## Event Awards

This tab manages awards earned by clubbers who participate in an event. The list of events is determined by [Generic Lookups](#) > Events. Select an event, then use the grid on the right to add, modify, or remove associated awards. These awards appear as options in the [Event dialog](#) when using the Event Module.

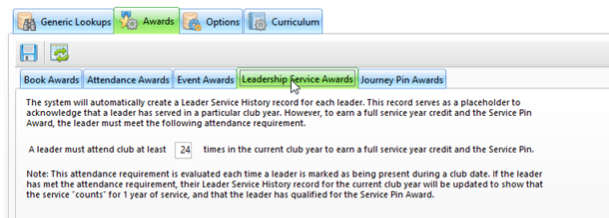


## Leadership Service Awards

This tab provides a setting for the number of times a leader must attend to earn a full service year credit (and count toward a Service Pin). The default is 24, but can be changed.



This requirement is evaluated each time a leader is marked 'present'. If the leader meets the attendance requirement, the [Leader Service History](#) record for the current club year is updated.



## Journey Pin Awards

This tab handles the criteria for the Journey Achievement Pins given for completion of all requirements during each year in Journey. This is independent from the cumulative book awards (Excellence, Timothy, etc.).



The requirements in a given club year have changed over time. The database has been updated to handle those changes, but given the different ways an Awana club may operate, there could be clubbers whose time in Journey spans the changes which makes evaluation difficult. Please be aware of a clubber's specific situation to verify all requirements set by Awana Clubs International are met.

The grid includes details for the awards based on credits for each year requirements are met. It is similar to the **Cumulative Book Awards** tab, but is limited to completed Journey items. Under the older curriculum, completion of 2 Study guides and a Bible Reading plan (which includes the Service/Training items) counts as 1 year credit. Under the newer curriculum, handbooks include the Bible readings and Service/Training items so count as 1 year credit without additional requirements. The relevant pin is awarded based on the total number of credits earned.

Effective	Expiration	# Vis Meeting Requirements	Award 1 Name	Award 1 Item #	Award 2 Name	Award 2 Item #
1/1/2000	12/31/2030	1	Journey Year 1 Achievement Pin	81613		
1/1/2000	12/31/2030	2	Journey Year 2 Achievement Pin	81621		
1/1/2000	12/31/2030	3	Journey Year 3 Achievement Pin	81630		
1/1/2000	12/31/2030	4	Journey Year 4 Achievement Pin	81648	Journey Completion Pin and Certificate	90825

## 18.4.3 Options



The Options tab provides a variety of customizations. These options have defaults that reflect the most common uses among Awana programs, but allow changes to meet specific needs.



When getting started, if all of the options are a bit overwhelming, just start with the defaults. If you ever wish something was done differently, check back here to see if it can be changed!

## Members

This tab provides options related to [Member windows](#).

Members | Check-in | Registration Form and Reports | Inventory and Ordering | Misc | Fees and Dues

- Use a member's Title when deriving the Mailing Name (e.g. Miss Suzie Smith)
- Apply the default area code when entering member phone numbers Tip: The Default Area Code is used when entering member phones. For example, if your default area code is 202, then when you type 5551212 and press Tab, you'll get a formatted result of: (202) 5551212
- Use the Church's City, State, and Postal Code as the default values when creating new members Tip: Regardless of whether or not you select this option, you can always skip the City and State fields leaving them blank, and enter a Postal Code and the City and State values will fill in automatically based on entries for "City, State, Zip" under your Generic Lookup Values.
- Use our Church Name as the default Church Name value when creating new members
- Override City and State values when the Postal Code changes and a matching record is found in the lookup table
- When tabbing through the address fields, skip the City and State and go directly to the Postal Code field Tip: If you prefer to enter the Postal Code first so that the system will always lookup the matching City and State values, you can use this feature to set focus in the Postal Code field a little faster.
- Allow member records to be saved without an address
- Show the External ID fields on the Member form (External IDs may be used as a link to your Church Database)

## Check-in

This tab provides options that deal with the [Check-in Module](#).

Members | Check-in | Registration Form and Reports | Inventory and Ordering | Misc | Fees and Dues

SpeedCheck

When the SpeedCheck feature is turned on, select fields that should be checked automatically when the Club Attendance checkbox is checked.

Church Attend

Uniform

Bible

Book

Bonus

Shoes

On Time

Note: Hidden columns will not be affected by

Notes about the Point Categories

- The point values for the various Check-in categories (Attendance, Uniform, Bible, Book, and Sections etc.) are used when calculating the Total Points on the Check-in Screen. You may customize all of these point values under the Admin > Club Setup screen.
- If you do not want to use a particular point category (e.g. SS Attendance), use the Quick Customization options on the Check-in screen and simply hide the columns. (Note: The Quick Customization button is the tiny button in the upper left corner of the grid)
- The Check-in point values apply to all weeks of the current club year. Thus, changes made to any values in mid-year will retroactively affect the total points for all prior weeks of the current club year.

## Registration Form and Reports

This tab provides options related to the [Registration Forms](#). There are several tabs. The Clubbers and Leaders Registration Forms can be customized individually. If the **Clubbers / Leaders** radio button is available, use it to switch between each form.

### Terms and Conditions

Customize the text in the Terms and Conditions section for either Clubbers or Leaders.

Members | Check-In | **Registration Form and Reports** | Inventory and Ordering | Misc | Fees and Dues

Terms and Conditions | Instructions and Background Check | Office Use | Alternate Medical Text | Permission Defaults

Form Type:  Clubbers  Leaders

**Terms and Conditions**

Be mindful that the space on the report layout is limited. After editing text here, run the Registration Form report to see how all of

1) I understand that my child/children may participate in physical activities such as those held during Game Time. As with any physical activity, there is a risk of injury. I fully accept the risk and hold harmless from any legal liability. [Your Church Name] and any persons involved in the Awana Club ministry.

2) In the event of an emergency that requires medical treatment for the above named child/children, I understand every effort will be made to contact me or my emergency contact. However, if I/we cannot be reached, I give my permission to the AWANA volunteers to secure the services of a licensed physician to provide the care necessary for my child's well being. I assume responsibility for all costs connected to any accident or treatment of my child.

### Instructions and Background Check

Personalize the instructions or background check notices.

Members | Check-In | **Registration Form and Reports** | Inventory and Ordering | Misc | Fees and Dues

Terms and Conditions | **Instructions and Background Check** | Office Use | Alternate Medical Text | Permission Defaults

Form Type:  Clubbers  Leaders

**Instructions:**

Text entered in this field (up to 3 lines) will appear at the top of the PRE-FILLED Registration form and would typically be used for a welcome followed by instructions for making corrections to the data contained in the PRE-FILLED form:

Instructions: Please review the following information for accuracy and make changes as needed. You may use the backside of this form if you need more room to write. If you have any questions, please contact our Awana Secretary at 608-255-5555.

Text entered in this field (up to 3 lines) will appear at the top of the BLANK Registration form and would typically be used

### Office Use

Customize the office-related information to use.

Members | Check-In | **Registration Form and Reports** | Inventory and Ordering | Misc | Fees and Dues

Terms and Conditions | Instructions and Background Check | **Office Use** | Alternate Medical Text | Permission Defaults

Form Type:  Clubbers  Leaders

**Office Use**

This section appears in the lower right corner of the Registration Form. You may choose to use this area to keep track of amounts owed and list the cost of various items such as handbooks and uniforms. It may also be the area where you indicate payments received.

Fees:	
Dues	_____
Book	_____
Uniform	_____

### Alternate Medical Text

Indicate customized alternate medical text for the Clubber Form.

Members | Check-In | **Registration Form and Reports** | Inventory and Ordering | Misc | Fees and Dues

Terms and Conditions | Instructions and Background Check | Office Use | **Alternate Medical Text** | Permission Defaults

**Alternate Medical Text**

If you prefer not to use the standard layout in the Medical section of the Registration form that displays the columns of: [Clubber Name / Doctor / Dentist / Allergies / Meds / Special Needs] you can enter your own text (up to 9 lines) in the field below and then on the Registration Form report dialog select the option to use THIS alternate text instead.

Please describe any medical conditions/situations that we should be aware of.

### Permission Defaults

Select which permission fields to update (on a Member's [Misc.](#) tab) when registration is set to 'current'.

Members | Check-In | **Registration Form and Reports** | Inventory and Ordering | Misc | Fees and Dues

Terms and Conditions | Instructions and Background Check | Office Use | Alternate Medical Text | **Permission Defaults**

**Default Values used for the Permission fields**

Use these checkboxes to set the default values of the various member Permissions (as seen on the Misc tab of the Member form). When a member's Registration is set to 'Current', either through the new Registration module, the checkbox on the Misc tab of the Member form, or through a popup menu item on the Clubber list, the following values will also be set automatically.

- Activity Participation
- Photo Use
- Travel

## Inventory and Ordering

[These are all currently set to 'on' and the screen is read-only.]

Generic Lookups Awards Options Curriculum

Members Check-in Registration Form and Reports **Inventory and Ordering** Misc Fees and Dues

Automatically reduce the Inventory count of related items when a new Award or Fee is created  
 Automatically increase the Inventory "Quantity in Stock" when orders are marked as "Received" and the line items are checked in  
 Automatically add line items to an open supply order when the Inventory Item's Order Level Quantity is reached  
 When adding new Line Items to an Order, display the Expense Category column and populate it with the default value as set in the related Inventory record.

Tip: Before a new club year begins, take a physical inventory count of your supplies and update each item's Quantity in Stock and also set your re-order levels. Then, as you assign books and uniforms and awards are earned AWiDb will keep track of your depleted quantities and automatically add line items to an Order form.  
 Note: If there are no supply orders with a status of "Open" when a re-order level is triggered, a new order will be created.

## Misc

This tab includes various options that were not included in the other tabs.

Generic Lookups Awards Options Curriculum

Members Check-in Registration Form and Reports Inventory and Ordering **Misc** Fees and Dues

**Reports:**  
 Default (selected) button on the report: [Preview] [v]  
 Default value for the "Award was Received" checkbox (for section-level awards):  Award was Received  
 Default value for the "List all awards from both Ultimate Challenge books":  List all awards from both Ultimate Challenge books

**Handbook Assignment Dialog:**  
 When assigning new handbooks, the default translation value should be set to: [NKJV] [v]  
 Tip: Identifying a specific translation when assigning handbooks will allow the correct item number to be used in the process of automatically reducing your inventory count. Further, having an accurate count of items in your inventory will maximize the benefits of the automated ordering process.  
**Default Values:**  
 Create a Fee record for each book assigned (if price > \$0.01)  
 Mark each book as having been received  
 Reduce the Inventory Qty in Stock for each book assigned

**System Settings:**  
 Automatically log off users when they have been inactive for: [60] [v] minutes.

## Fees and Dues

This tab contains two sub-tabs:

### Main

This tab provides options related to fees and dues.

Members Check-in Registration Form and Reports Inventory and Ordering Misc **Fees and Dues**

**Main Account Statement**

**Fees:**  
 When entering Fees, the default "Due Date" for balances should be the Current Date + [14] [v] days.  
 When a Balance Due is waived, a payment record is automatically created to offset the balance. This payment's Type = "Waived", and the "Payor" name should appear as: [A Sample Church] [v]  
 Default value for the "Item Received" field on the Fee dialog: [Received] [v]  
 Note: Books and Uniforms are handled under Misc tab.

**Dues:**  
 Dues ARE collected for one or more clubs  
 When applying pre/post paid dues, SKIP weeks where the clubber was absent if the week < Current Club Date.  
 If dues ARE collected and the relevant club's Weekly or Annual Dues Amount is > 0.00 (see Admin > Club Setup), then a Fee record representing the Annual Dues amount owed needs to exist for each active clubber so that all dues-related payments can be applied against it. You can create this "Dues" Fee record.

### Account Statement

This tab allows customization of the text used at the top of the [Household Account Statement](#).

Members Check-in Registration Form and Reports Inventory and Ordering Misc **Fees and Dues**



**Main Account Statement**

**Account Statement Opening Paragraph Text**  
 The following text will appear at the top of the Household Account Statement report:  
 Dear Awana Club Family:  
 This Household Account Statement is provided to give you an accounting of charges and credits relevant to those family members who are participating in the club. If you have a balance due, we ask that you please help cover the costs by dropping off a full or partial payment to the Awana Club Secretary.



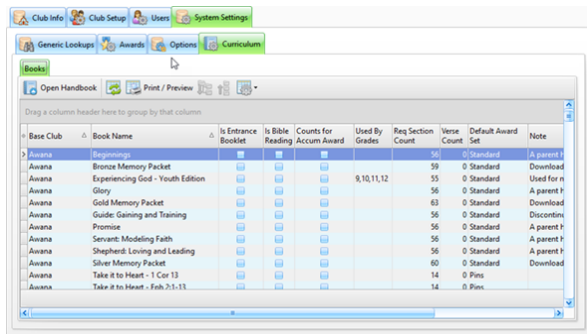
## 18.4.4 Curriculum

The Curriculum tab displays the handbooks and other curriculum items used in Awana. Besides the normal [grid manipulations](#), the following buttons are available on the toolbar:

	<b>Open Handbook</b>	Opens the <a href="#">Generic Handbook Window</a> to view or modify information about the selected generic handbook.
	<b>Grid Tools</b>	Lists <a href="#">actions related to the grid</a> such as: saving or resetting a grid layout, or exporting data.

## Books

This tab displays all handbooks in the database. To view or modify details, either double click a handbook or select the row and click **Open Handbook** to open the [generic handbook window](#).

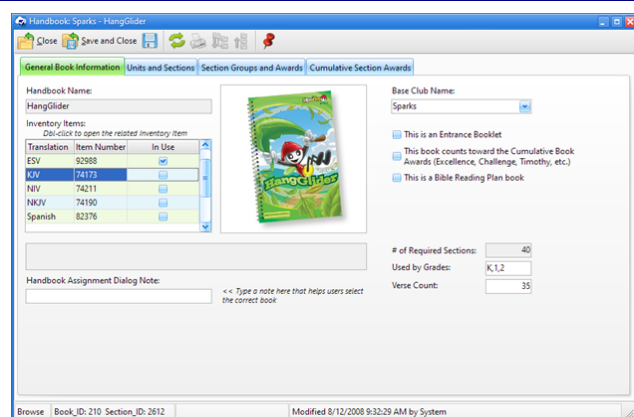


## 18.4.4. Generic Handbook Window

### 1

Opening a record from the [Curriculum](#) list opens the Generic Handbook window. It can also be opened using the **Open Handbook** button on the **Member Window > Handbooks** toolbar. This form displays the detailed data for each handbook. It has four tabs, as described below.

### General Book Information



Under the **General Book Information** tab, some fields are read-only and are presented for informational purposes. Though changes are rarely needed, the following fields do allow editing:

- **Inventory Items** - lists inventory records for the various translations of the handbook. Any translations **"In Use"** are included in the initial display of books in the [Handbook Assignment](#) dialog.
- **Handbook Assignment Dialog Note** - this appears in the [Handbook Assignment](#) dialog. It can help users make the correct selection, especially if there are multiple revisions of the same book.

- **Base Club Name** - the PRIMARY base club that uses the book.
- **This is an Entrance Booklet** - indicates the book is used as an entrance booklet.
- **Counts toward the Cumulative Book Awards** - indicates the book should be counted toward major book awards, such as Excellence, Timothy, Citation, etc
- **This is a Bible Reading Plan book** - used by Trek or Journey to track completion of reading through the books of the Bible
- **# of Required Sections** - indicates how many required sections are in the book
- **Used by Grades** - tracks which grades use this book.
- **Verse Count** - shows the number of verses included in the required sections of the handbook.

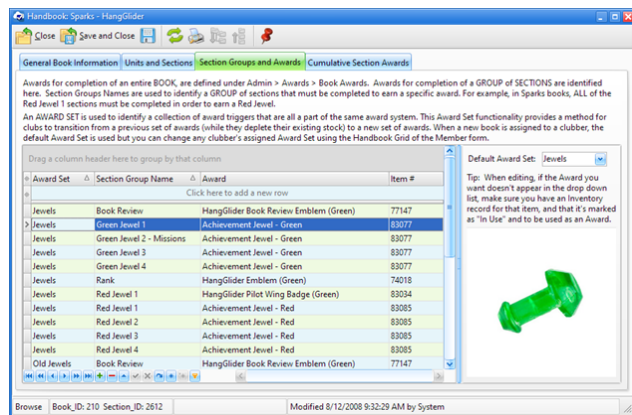
## Units and Sections

Section ID	Unit Name	Sect Num	Sect Order	Section Name	Required	Group Name	1st Award for completing the
Unit 2							
Unit 3							
2626	Red Jewel 3	1	1	Red Jewel 3:1	<input checked="" type="checkbox"/>	Red Jewel 3	
2627	Red Jewel 3	2	2	Red Jewel 3:2	<input checked="" type="checkbox"/>	Red Jewel 3	
2628	Red Jewel 3	3	3	Red Jewel 3:3	<input checked="" type="checkbox"/>	Red Jewel 3	
2629	Red Jewel 3	4	4	Red Jewel 3:4	<input checked="" type="checkbox"/>	Red Jewel 3	
Unit 4							
2644	Green Jewel 3	1	5	Green Jewel 3:1	<input checked="" type="checkbox"/>	Green Jewel 3	
2645	Green Jewel 3	2	6	Green Jewel 3:2	<input checked="" type="checkbox"/>	Green Jewel 3	
2646	Green Jewel 3	3	7	Green Jewel 3:3	<input checked="" type="checkbox"/>	Green Jewel 3	
2685	Green Jewel 3	4	8	Green Jewel 3:4	<input checked="" type="checkbox"/>	Green Jewel 3	
2686	Green Jewel 3	1	10	Green Jewel 3:1 Review	<input checked="" type="checkbox"/>	Book Review	

The **Units and Sections** tab displays all the handbook sections in the book. The following fields are editable:

- **Required** - required sections appear on the "Required" sections tab wherever handbook sections can be marked as completed, such as the [handbook panel](#) of the Check-in module, or the [Handbook](#) tab of the Member form. Sections that are NOT required are considered Review or Extra Credit sections, and appear on the Review/Extra Credit tab.
- **Group Name** - indicates what group the section belongs to. We recommend not making changes to the Group Name values as this might impact award triggers.
  - 💡 Changing the required status of a section from 'Yes' to 'No' does require removing the Group Name for that section so the database does not include that section when evaluating the sections for the group award. To remove the Group Name, click into the cell and then press the Delete button.
- **1st Award for completing the Single Section / 1st Award Item#** - award to trigger when the specific single section is completed. Generally only Cubbies have values here because they get a sticker for everything they do.
- **2nd Award for completing the Single Section / 2nd Award Item#** - works the same as corresponding 1st Award fields but allows a second award to be triggered when the single section is completed.

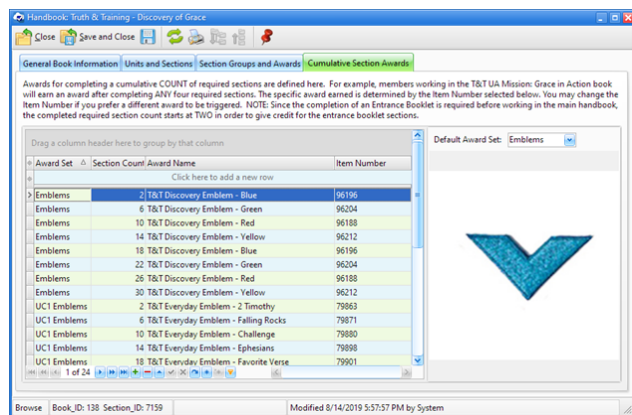
## Section Groups and Awards



The **Section Groups and Awards** tab includes a grid with records used to trigger awards for a group of sections that have been completed (for example all Green Jewel 3 sections). Under the **Units and Sections** tab, sections have a **Group Name**. When all sections with the same Group Name are completed, the corresponding award (as defined by records in this grid) is triggered. When using the common award system recommended by Awana, these should not need to be changed.

The **Default Award Set** might have more than one option. For many years T&T used seals. They later changed to the various badges and patches. These were set up as a new award set. Choosing the default award set allowed use of a supply of older awards before switching to newer ones. The default award set here determines the award set to use when a book is assigned. Award sets for individual member's books are managed by opening the Member record, going to the [Handbook tab](#) and then clicking in the Award Set field of the assigned handbook.

## Cumulative Section Awards



The **Cumulative Section Awards** tab includes a grid with records used to trigger awards based on a set number of sections being completed (for example, any 4 sections in a book). When the section count is met, the corresponding award (as defined by records in this grid) is triggered.

The **Default Award Set** might have more than one option. For many years T&T used seals. They later changed to the various badges and patches. These were set up as a new award set. Choosing the default award set allowed use of a supply of older awards before switching to newer ones. The default award set here determines the award set to use when a book is assigned. Award sets for individual member's books are managed by opening the Member record, going to the [Handbook tab](#) and then clicking in the Award Set field of the assigned handbook.

# **Chapter**

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**19**

## 19 Approved Workman Terminology

**Awana** – In the context of entering records in the database and assigning Club Names, there is a generic "Awana" club name in addition to the other club names like "Cubbies", "Sparks", "T&T", etc. This generic "Awana" club name is intended to be used for leaders who do not serve exclusively in a specific club; for instance, a Commander, Pastor, Games Director, Song Leader, Secretary etc. If a leader is serving in a specific club (i.e., a Sparks Director) it is appropriate to use a specific Club assignment.

**Awana® Clubs International** – The central organization responsible for creating, organizing and running the Awana program. If you have an Awana program at your church, you must be chartered with Awana Clubs International.

**Awana Program** – The running of a chartered club from Awana® Clubs International by a local church. (Not the AWdb software program.)

**AWdb** – An abbreviation for the Approved Workman Database software application. Also AW for Approved Workman.

**Club** – Individual clubs separated by age/grades and distinguished by uniform and curriculum levels/design. There are currently six clubs in Awana: Puggles, Cubbies, Sparks, Truth and Training (T&T for short), Trek, and Journey.

**Club Dates** – The dates on which an Awana program is scheduled to meet. For instance, if your Awana program meets on Wednesdays, the Club Dates will be Wednesdays.

**Member** – A person involved in your Awana program, either as a **clubber** or as a **leader**.

**Clubber** – A child who regularly attends and participates in your Awana program.

**Leader** – An adult who helps in your Awana program after having gone through at least a preliminary training program and a certification test.

**Student Leader** – An adult or teen who has not gone through a training program. Usually teens must go through two years of training before taking a certification test. If Trek and Journey meet on a separate night from the rest of your Awana program, it is not unusual for those clubbers to volunteer in younger clubs such as Cubbies or Sparks.

**Section** – In most Awana® Clubs International curricula, the books are separated into "sections." A section is distinguished as what a clubber must complete all at once (for instance, a clubber must recite all verses within a section to the leader in one sitting, with a maximum of two prompts or helps), and usually is comprised of one to three verses, a Bible Study or activity. Sections are known by specific names according to club: Cubbies have "Bear Hugs," Sparks "Jewels", and T&T "Discoveries."

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