

# Quick Guide to the NCCC Membership Database

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## SECTIONS

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This is a (relatively) quick guide to the main functions of the NCCC database. Since the database is web-based, you can access it from anywhere. You can even use a cell phone, though it's very hard to do anything useful from a phone.

The database can track club membership and regional membership, but we generally don't use those functions.

This seems very complex but it's actually pretty easy after you've done it a few times.

Log in to the database with your login name and password. You will arrive at the Main Menu.

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### **To add a new Primary member:**

The database programmer does not want any duplicate entries because of the added confusion, so we have to do a little extra work.

Please search for the new member in the database to make sure a record does not already exist for that person. See the **Search for a member** section.

If they are already in the database, see the following...

**Reactivate a member, Transfer an active member** or **Transfer an inactive member** section, whichever applies.

Assuming the new member is not already in the database, from the Main Menu:

- 1 - Click the "Add a New Member" button (left side). The database will put up a dialog box reminding you to look up the member. Click "OK".
  - 2 - An empty member info screen will appear.
    - Fill in the appropriate information.
    - Case is not important and the database will reformat everything later.
    - If there is a Spouse/Companion, remember/write down the Primary's NCCC member number.
  - 3 - Click the "Update database with changed information" button.
    - The database will reformat the information.
    - You will get a message if there is missing data. Correct the problems.
  - 4 - Click the "**Main Menu**" button (or the "**Go to Renewals Screen**" button, if you are done adding new members).
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#### **To add a new Spouse/Companion:**

- 1 - Click the "**Add a New Member**" button (left side).
  - 2 - An empty member info screen will appear.
  - 3 - Fill in the first and last names.
  - 4 - Under "NCCC Member Type" (upper right corner), choose "NewSpouse" or "NewCompanion" from the drop down list.
  - 5 - Select the gender from the drop-down list.
  - 6 - Fill in the "**Primary Member #**" box (lower left side) with the Primary's NCCC number.
  - 7 - In the "Amount Paid" box (lower right corner), enter the dollar amount in the "Amount Due" box directly above it.
  - 8 - Click the "**Update database with changed information**" button. You can also hit the <return> key.
    - The database will show you the Primary's info with the Spouse/Companion's info. The address and other info will be copied to the Spouse/Companion's area.
  - 9 - Click the "**Main Menu**" button (or the "**Go to Renewals Screen**" button, if you are done adding new members).
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#### **To reactivate a Primary member:**

In the center of the Main Menu screen is a drop-down list "**Update Inactive Member**".

- 1 - Choose the person you want to reactivate. If a couple is involved, choose the Primary member first.
  - The person's information screen will appear. Set the following fields:
- 2 - Under "**NCCC Member Type**" (upper right corner), choose "**LateRenewPrimary**".

from the drop down list.

3 - Click the "**Active**" box (upper right side) so that a check mark appears there.

4 - In the "**Amount Paid**" box (lower right corner), enter the dollar amount in the "**Amount Due**" box directly above it.

5 - Change the address and other info as needed. You can also put in telephone numbers and an email address.

If a Spouse/Companion is involved, remember/write down the Primary's NCCC number.

6 - Click the "Update database with changed information" button. You can also hit the <return> key.

The screen will update and reformat the information. If there is a problem the database will tell you.

When you are through updating all the members, click the "**New Member Processing** or **Renewal Processing**" button.

Alternatively, when you are on a member info screen you can click the "**Go to Renewals** Screen" button.

See the **Renewals** section.

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### **To reactivate a Spouse/Companion:**

1 - Choose the person from the "Update Inactive Member" list.

2 - Under "NCCC Member Type" (upper right corner), choose "**LateRenewSpouse**" or "**LateRenewCompanion**" from the drop down list.

3 - Click the "**Active**" box (upper right side) so that a check mark appears there.

4 - Fill in the "Primary Member #" box (lower left side) with the Primary's NCCC number.

5 - In the "Amount Paid" box (lower right corner), enter the dollar amount in the "Amount Due" box directly above it.

6 - Click the "Update database with changed information" button. You can also hit the <return> key.

The database will show you the Primary's info with the Spouse/Companion's info. The Primary's address and other info will be copied to the Spouse/Companion's area.

When you are through updating all the members, click the "New Member Processing or Renewal Processing" button.

Alternatively, when you are on a member info screen you can click the "Go to Renewals Screen" button.

See the **Renewals** section.

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### **Renewals:**

You can get here from the Main Menu by clicking the "New Member Processing and Renewal Processing" button on the far right, or from the member information screen by

clicking the "**Go to Renewals Screen**" button.

This screen shows you a list of the members you are adding or updating. You can use this screen at renewal time to update and track your members as their dues checks come in.

If the "**Amount Due**" and the "**Amount Paid**" do not match, the person will be highlighted in yellow.

Click on the member's "**Amount Paid**" box to go to their member info screen to correct the problem. Fill in the "**Amount Paid**" box with the correct amount.

If all the members on the list are highlighted in tan then you can proceed.

1 - The database will tell you how much the dues check to NCCC should be in the upper left corner under "**Total NCCC Dues**".

2 - The amount in the "**NCCC Funds Received**" box will be the same if all the members are highlighted in tan.

This is the amount the dues check to NCCC should be made out for.

3 - Put the NCCC dues check number in the "NCCC Check #" box.

If you don't know what the check number will be, put in zero -- there must be something in this box to proceed.

4 - Click the "**Submit information To RMD**" button.

If the database complains about a missing check number, put any number in the "NCCC Check #" box.

A new screen will appear with my mailing address so you'll know where to mail the check.

The database will lock you out of the functions related to adding new members until I receive your check and approve or reject the transaction.

The database sends me an email to let me know that I should be expecting your check.

If you *don't* click this button the RMD will do it for you when the check is received.

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### **To transfer an active member:**

Determine the member's current NCCC number by using the "**Search for a member**" function or some other way.

1 - Put the member's current NCCC number in the "NCCC Number:" box on the right side of the Main Menu screen.

2 - Click the "Transfer a Member from another club" button.

Their member info screen will appear.

3 - Click the "Update database with changed information" button.

4 - Click the "**Main Menu**" button (or the "**Go to Renewals Screen**" button).

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### **To transfer an inactive member:**

Determine the member's current NCCC number by using the "**Search for a member**" function or some other way.

- 1 - Put the member's current NCCC number in the "NCCC Number:" box on the right side of the Main Menu screen.
  - 2 - Click the "Transfer a Member from another club" button.  
Their member info screen will appear.
  - 3 - Set the "NCCC Member Type" to the appropriate choice -- LateRenewPrimary, LateRenew Spouse or LateRenewCompanion.
  - 4 - Click the "Active" button so that a check mark appears there.
  - 5 - Fill in the "Amount Paid" box with the amount shown in the "Amount Due" box directly above it.
  - 6 - Click the "Update database with changed information" button.
  - 7 - Click the "**Main Menu**" button (or the "**Go to Renewals Screen**" button).
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### **To make a member inactive:**

Go to the member's info screen by selecting their name from the "Update Active Member" drop-down list.

- 1 - Click the "Active" checkbox so that the check mark goes away.
  - 2 - Click the "Update database with changed information" button.
  - 3 - Their information will disappear and a selection of buttons will appear.
  - 4 - Click the "**Main Menu**" button
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### **To mark a member as deceased:**

Go to the member's info screen by selecting their name from the "Update Active Member" drop-down list.

If the person is a Spouse/Companion:

- 1 - Click the "Active" checkbox so that the check mark goes away.
- 2 - Select "Deceased" from the "NCCC Member Type" drop down list.
- 3 - Click the "Update database with changed information" button.
- 4 - If everything is OK, Click the "**Main Menu**" button.

If the person is a Primay member with no Spouse or Companion:

- 1 - Click the "Active" checkbox so that the check mark goes away.
- 2 - Select "Deceased" from the "NCCC Member Type" drop down list.
- 3 - Click the "Update database with changed information" button.
- 4 - If everything is OK, Click the "**Main Menu**" button.

If the person is a Primary member with a Spouse or Companion:

- 1 - Click the "Active" checkbox so that the check mark goes away.
  - 2 - Select "Deceased" from the "NCCC Member Type" drop down list.
  - 3 - Change the Spouse/Companion "NCCC Member Type" to "Primary".
  - 4 - Click the "Update database with changed information" button.
  - 5 - If everything is OK, Click the "**Main Menu**" button.
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#### **To search for a member:**

- 1 - At the Main Menu, put the person's last name in the "**Search for Member**" box (lower left corner).
- 2 - Click the "**Lookup Member**" button or hit the <return> key.
- 3 - If you are adding a new member, check the list that comes up to make sure the person is not on it.

If their name is on the list then you need to either **reactivate** them (if they are a former member of your club) or transfer them (if they belong to another club).

If they are inactive and belonged to another club, you will need to **reactivate** them before you **transfer** them to your club.

If you want to check out anybody on the list for more information, click on their last name. Their member info screen will appear.

- 4 - Click the "**Previous Screen**" button to go back to the **Main Menu**.
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Many Thanks to Cliff Harris for these procedures.

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