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The Directory Master – User Guide

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Installation:

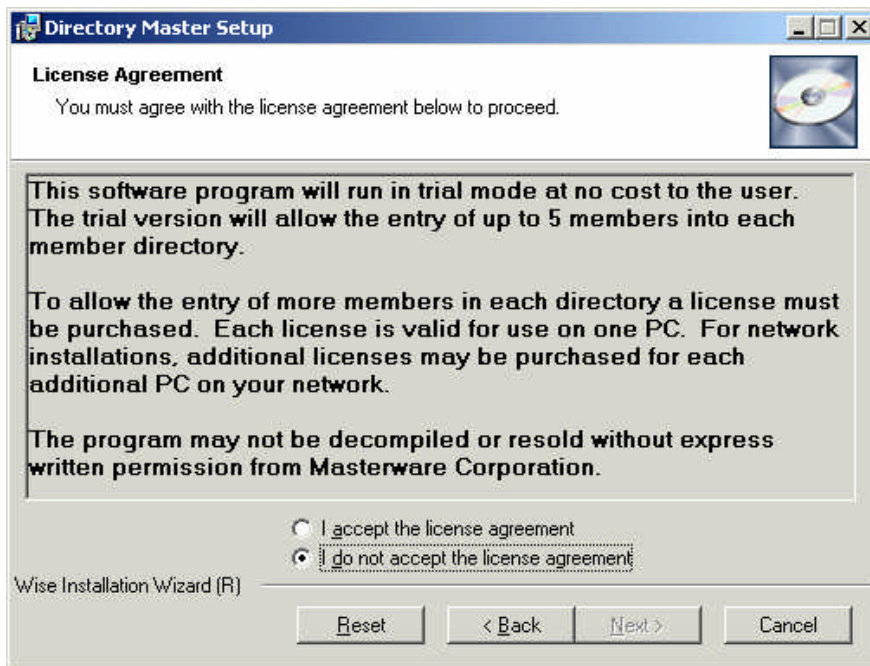
If you downloaded the setup from our web site, the setup file is named DMSetup.exe so go to where you downloaded this file and double-click it to start the installation. If you received the program on a CD then go to your CD drive and double-click the DMSetup.exe program file to start the installation.

The setup program will take you through the following screens:

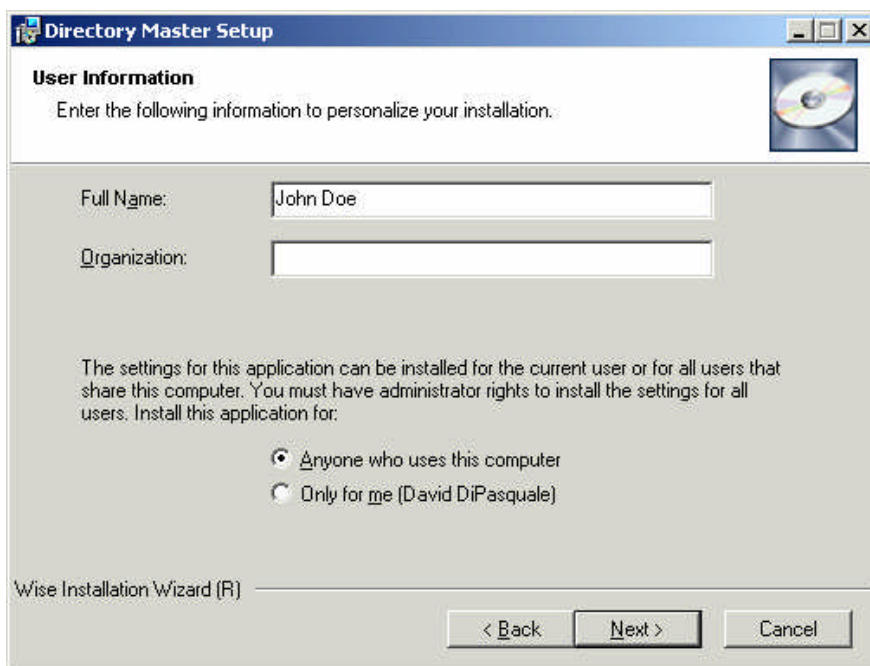


Click the [Next] button to continue

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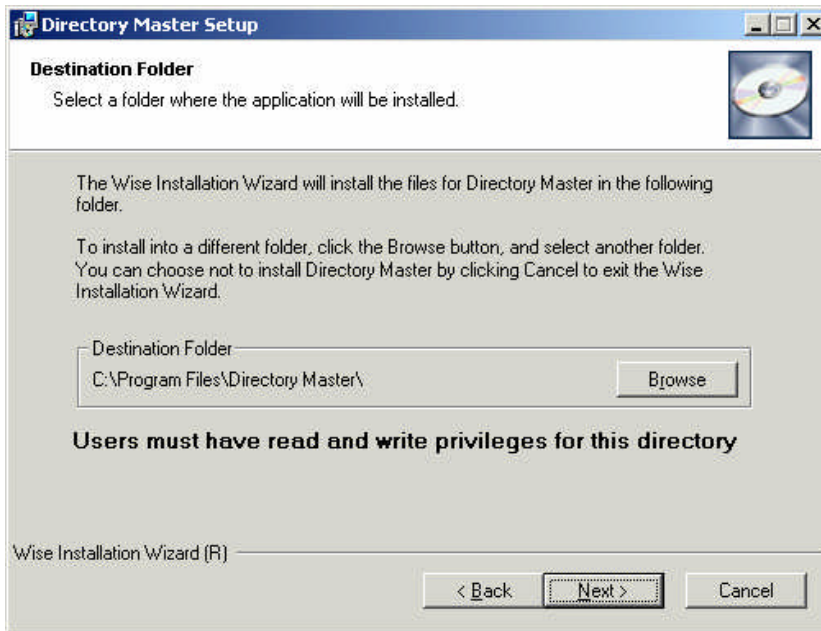


You must accept the license agreement to continue.

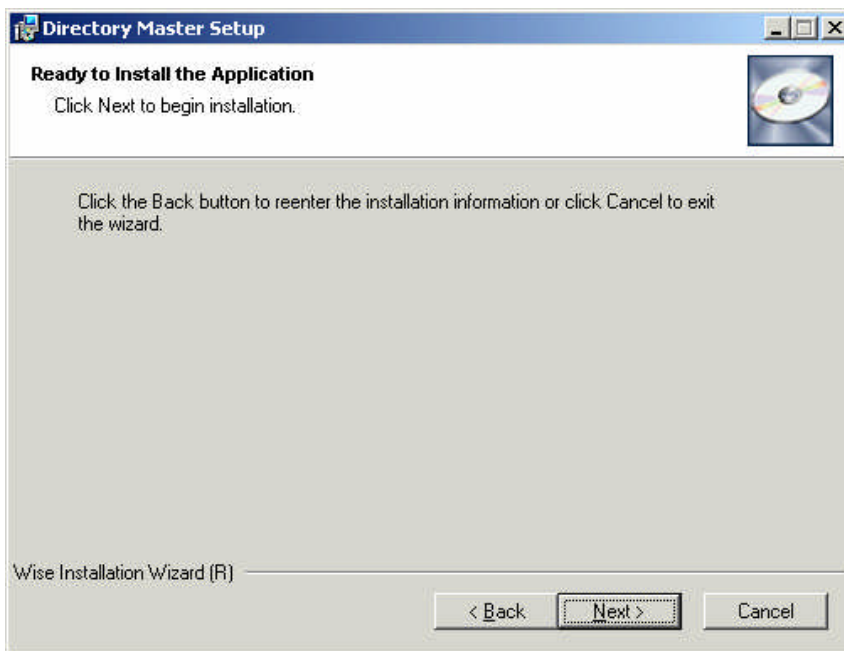


You must enter your name, but the Organization entry is optional.

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We recommend that you select the default location, as shown on this screen for the installation of the program. Only select another destination folder if you specifically want to run it from this alternate location. Network users may want to install the program on a networked drive.



When you click the [Next] button on the above screen the setup program will begin installing the program on your PC. When the installation is completed the following screen will be displayed:

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Click [Finish] and you will be returned to your PC's desktop. You will then have a program group named "Directory Master" where you can run the program. Also a shortcut named "Directory Master" will be on your desktop, so you can quickly launch and run the program.

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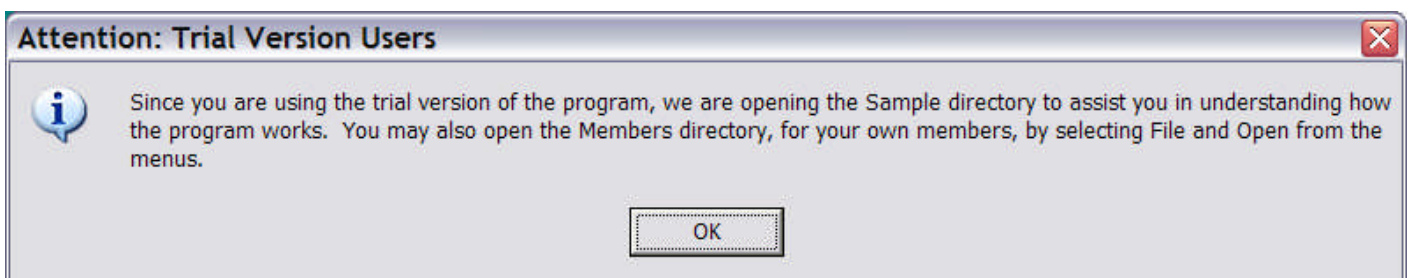
Getting Started

Free Trial Mode:

When you run the program, the following screen will be displayed:



We recommend that you thoroughly acquaint yourself with the program, in free trial mode before purchasing a license. Click the [Next] button to begin the free trial.



Click the [Ok] button to view the sample directory. The Sample Directory main screen is then presented:

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The Directory Master v1.5.3 (Free Trial Version)

File Reports Email About

Name Search:

Directory: Sample

Last Name
Davis
Lee
Stallard
Wilson

Membership Display:
 Active Inactive

Membership Reports:
 View Only PDF File

Member Info. Member Photo Member Dues

Last Name: Anniversary:

His Name: His Birthday:

Her Name: Her Birthday:

Address: Active

City, State Zip:

Home Phone: Photo:

Other Phones:

His Email: Her Email:

Biography:

Update Add New Delete

The name of the open directory is shown in the upper right area, so you always know which directory you have open. The names of the members of the directory are shown in the list to the left. By moving through the list the Member info. for each member is displayed. You also can quickly find a member by entering all or part of their last name in the Search area and then pressing the [Enter] key on your keyboard.

Member Info.

Members can be couples, singles or even your pets. We have included "Seven Davis" as the first entry in our sample, which is a dog. You edit member information by entering the changes and then clicking the [Update] button. The Update button will turn red in color to remind you that you have made changes so you don't forget to "update" before moving to another member. Click the [Add New] button to add a new member to your directory. Remember that the trial version is limited to 5 members per directory, whereas the licensed version does not have this limit. The [Delete] button allows you to remove a member. Deleted member information is not recoverable, so make sure that you truly do not want this member information again. We recommend using the Active checkbox instead of deleting members. By unchecking the Active checkbox, the member information is not deleted, but just moved to inactive and can be reactivated at any time.

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Member Photo:

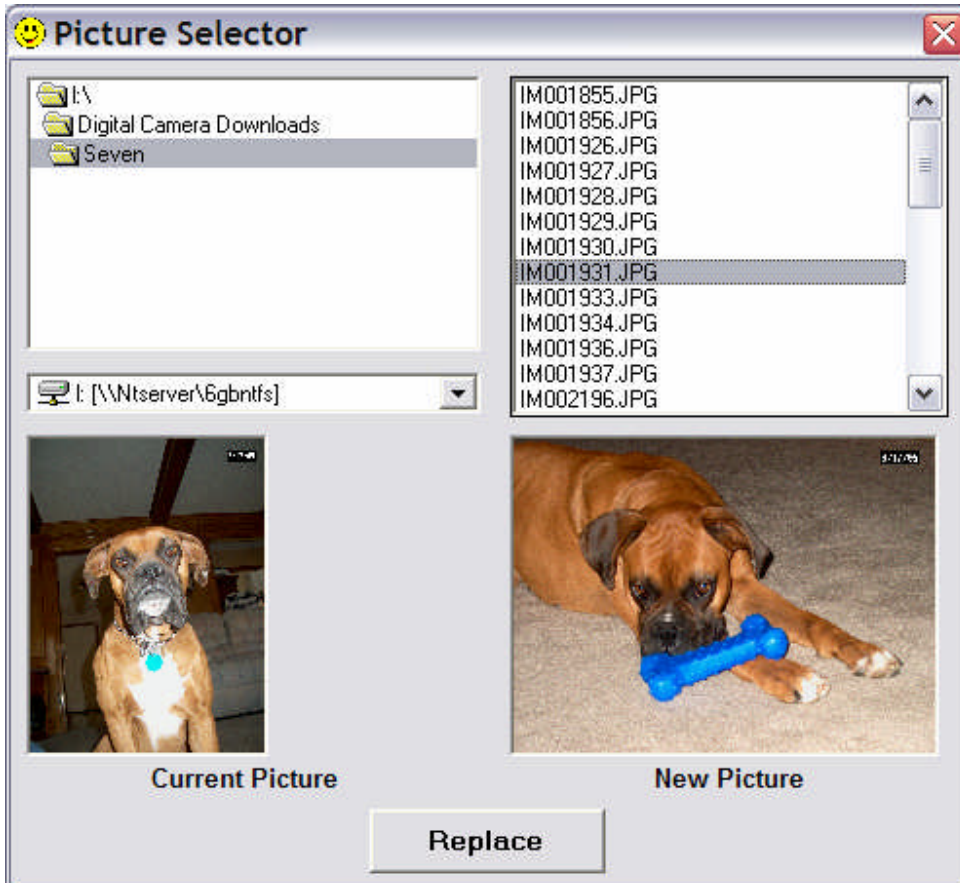
Each member of a directory can have a photo linked to their entry. Photos must be jpg format and we recommend using ones about 500 kb in size or less. Click the "Member Photo" tab and you can see the photo for the selected member. You can then go through the list of members and see their photos.



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Linking a Photo to a Member:

If a photo does not exist for a member the caption "Picture Not Available" will be displayed instead of the photo. The linked photo can be changed at any time by simply clicking the "Happy Face" icon. This will display the following screen:



You may go to any drive and folder on your PC and select a jpg photo. When you select a jpg file on the list on the right, the photo will be displayed. You can then select the new picture to replace the old picture by clicking the [Replace] button. We do not alter or delete any of the pictures from your source list of pictures. We simply make a copy of your existing file into our database for our program's purposes. Also if you replace an current picture with a new picture we prompt you to have us save a backup of the existing picture.

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Member Dues:

You may wish to track dues payments with our program. Simply click on the "Member Dues" tab and the dues payment history for the selected member will be displayed. The [Update], [Add New] and [Delete] buttons allow you to keep this information current.

The screenshot shows the 'The Directory Master v1.5.3 (Free Trial Version)' application window. The menu bar includes 'File', 'Reports', 'Email', and 'About'. The main interface is divided into several sections:

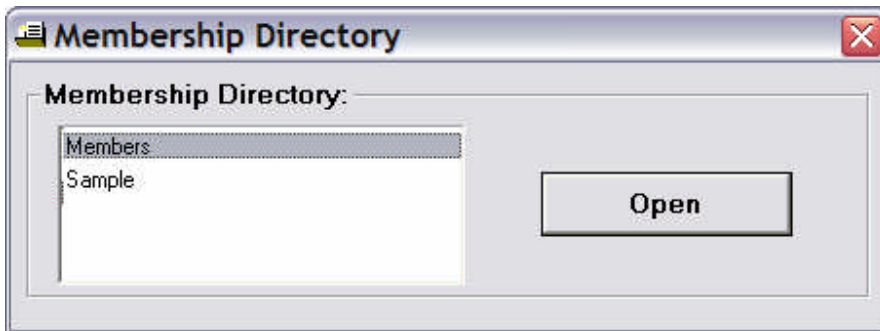
- Name Search:** A text input field.
- Directory:** A dropdown menu currently set to 'Sample'.
- Member Info. / Member Photo / Member Dues:** Three tabs, with 'Member Dues' selected.
- Member Dues Table:** A table with columns 'Date Paid', 'Amount Paid', and 'Paid By'. It contains one entry: Date Paid: 06/29/2006, Amount Paid: \$200.00, Paid By: Check.
- Form Fields:** Below the table, there are input fields for 'Date Paid' (set to 6 /29/2006), 'Amount Paid' (set to 200.00), and 'Paid By' (set to Check).
- Notes:** A large text area for entering notes.
- Buttons:** 'Update', 'Add New', and 'Delete' buttons are located at the bottom of the Member Dues section.
- Membership Display:** Radio buttons for 'Active' (selected) and 'Inactive'.
- Membership Reports:** Radio buttons for 'View Only' (selected) and 'PDF File'.

Date Paid	Amount Paid	Paid By
06/29/2006	\$200.00	Check

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Opening a Directory:

The trial version defaults to opening the sample directory, which has some entries to show you how the program works. You may also open the “Members” directory by selecting the Open menu item from the File menu. This will show the list of directories:



The trial version only allows you to have two directories; the Sample and the Members. With the licensed version you can create as many directories as you desire, by selecting the New menu item from the File menu.

Membership Display:

The program defaults to displaying active members. Click the Inactive option button to display the inactive members. Also clicking the Inactive and then the Active will refresh the display, which resorts the members in last name order. This is advantageous if you have entered a number of new members and they are not sorted properly in the list.

Reports:

The program defaults to creating reports in “View Only” mode. This mode will display the report on the screen and will then allow you to print a hardcopy. If you select the “PDF File” option under “Membership Reports” any reports created will be shown on the screen plus a pdf file will be created.

Four Reports are available:

- Directory with Photos – Creates a report with the Member Info. and the photo of each active member.
- Directory without Photos – Creates a report with only the Member Info.
- Photos Only – Creates a report with only the photos and a caption of the member’s name.
- Last Dues Paid – Creates a report with the date of last payment and amount for each member.

You access these reports from the Reports menu item.

If you are printing hard copies of your directory and want to conserve the cost of the directory, print the “Directory without Photos” and then print the “Photos Only” reports. Then take the reports to your copy store and have them printed. The “Directory without Photos” is a larger report, but only needs to be printed in black and white. The “Photos Only” is smaller so printing it in color will be less costly than printing the “Directory with Photos” report.

Email:

Save printing costs and send your membership directory by email to all or selected members. In order to use the email function you must setup the program to use your email service. Refer to the Setup section for instructions on how to complete this step.

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Select the Email menu item and the following screen will be displayed:

Email

Directories: **Attach**

- Members.Pdf
- Members_Dues_Report.pdf
- Members_List.Pdf
- Members_Photos.Pdf

Send to Members: (Double-Click to remove from list)

- Lee, Jake: masterware@kc.rr.com
- Stallard, Nathan: nathanSt@yahoo.com
- Wilson, John: myemail@yahoo.com

To: All Members Listed Above **Send to All**

Subject: Sample Directory Update

Message: Attached is a copy of the 'Sample Directory' membership directory, in Adobe Acrobat format.

Cancel **Send**

If you have created any pdf files from the reports menu item then they are displayed under the Directories list. If you wish to send a directory report then select it from the list and make sure the "Attach" checkbox is checked. The email defaults to sending to all members ("Send to All" checkbox is checked). The members who have provided their email address under the "Member Info." tab are displayed. You may remove members from the email list by double-clicking them (they are not deleted from the database, just removed from this email session). You may then modify the Subject and Message sections of the email. When you are ready click the [Send] button and the email will be sent.

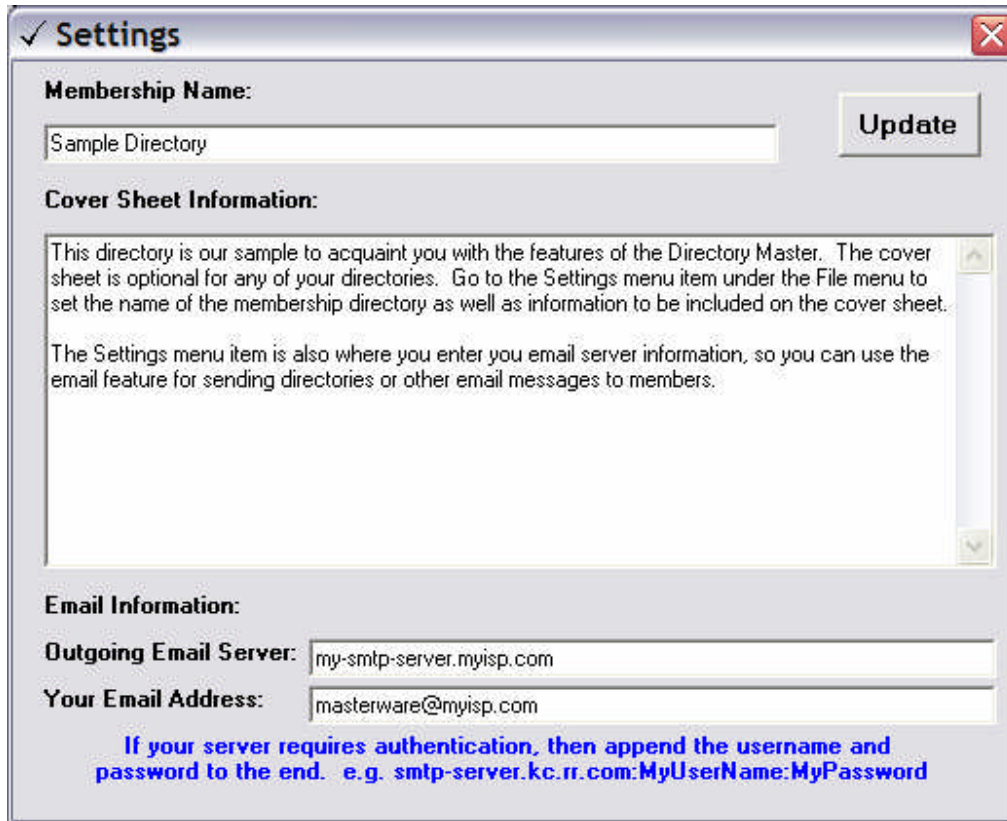
You may send the email to an single person by unchecking the "Send to All" checkbox. After completing this setup you select the individual to send the email to from the list. Their email address is then added to the "To:" field. You may also send the email to someone not on the list by entering their email address manually in the "To:" field.

The Email feature is also great for sending just email information to all members, without sending a directory. To do this simply uncheck the "Attach" checkbox under the Directories section. Fill in your email information and then send the email.

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Settings:

Select Settings under the File menu item and the following screen will be displayed:



The screenshot shows a 'Settings' dialog box with the following sections:

- Membership Name:** A text input field containing 'Sample Directory' and an 'Update' button to its right.
- Cover Sheet Information:** A text area containing the following text:

This directory is our sample to acquaint you with the features of the Directory Master. The cover sheet is optional for any of your directories. Go to the Settings menu item under the File menu to set the name of the membership directory as well as information to be included on the cover sheet.

The Settings menu item is also where you enter you email server information, so you can use the email feature for sending directories or other email messages to members.
- Email Information:**
 - Outgoing Email Server:** A text input field containing 'my-smtp-server.myisp.com'.
 - Your Email Address:** A text input field containing 'masterware@myisp.com'.

At the bottom of the dialog, there is a blue instruction: **If your server requires authentication, then append the username and password to the end. e.g. smtp-server.kc.rr.com:MyUserName:MyPassword**

Membership Name and Cover Sheet Information is unique for each directory you create. Email Information is entered once and applies to all directories, as it simply defines the parameters for sending emails.

Membership Setting –

Each directory can have a Membership Name, which is printed on the top of each report. Optionally each report can have a cover sheet. Cover Sheet Information can include basic information about the directory, which you want included on each directory you print or email. When completed with your changes click the [Update] button.

Email Setting -

In order to send email you must setup the program with your email server information. The bottom of the screen has the Email Information. Your Internet provider can assist you with the “Outgoing Email Server”. This is the same information contained in your email software for your account. If your email server requires secure authentication then make sure to append your username and password, something like the following:

My-smtp-server.myisp.com:MyUserName:MyPassword

The “Your Email Address:” field simply is your email address and is used for all email sends.

When completed with the changes click the [Update] button to record your changes.

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Licensing Your Product

You may obtain a license for the Directory Master, by purchasing a license key from our web site. Before going to our web site, open the program and the following screen will be displayed:



Click the [Add A License] button and your License Code will be displayed:



Go to our website and purchase the Directory Master. The purchasing process will request your License Code. After your purchase is completed the web site will return your License Key. Write down the License

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Key and store it in a safe place. Then enter the License Key in the space provided above. Then click the [Register] button and your program will now function on your PC in full operational mode.

The Licensed version of the program does not limit your number of members per directory, as the free trial version did. Also you may now create as many new directories as you desire. Note that we do recommend that you keep each of your directories under 5,000 members due to performance considerations. Also when you create pdf file directory reports to email make sure the file size does not exceed the limitations of your email service. Also be considerate of any of your members who still have dial-up connections to the Internet, as downloading your email could take them a long time.

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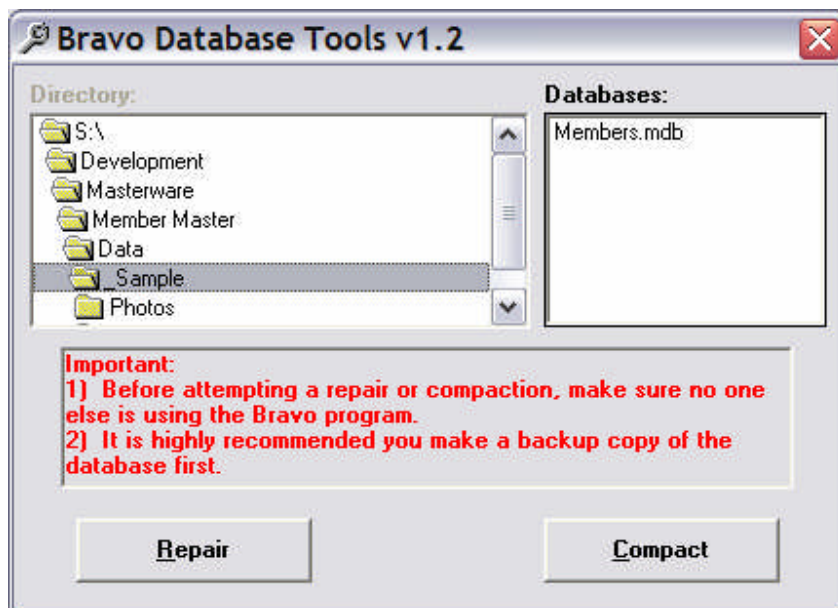
Maintenance Information

Backing Up Your Data:

Make sure to backup the complete directory (C:\Program Files\Directory Master). This will then backup the databases as well as all of the directories, photos and reports. We recommend at least weekly backups.

Repairing the Database:

Directory data is stored in Microsoft Access 97 databases. All databases are under the Data folder where the program is installed. In the unlikely event that the database becomes corrupted, run the Repair program. The repair program will display the following screen:



Make sure to backup the database before proceeding. Then, click on this database, so it is highlighted. Then click the [Repair] button after the repair is completed, you will be prompted as to its success. Finally click the [Compact] button. Then close the Repair program and try to run the Directory Master program again. It should open fine. If not contact us and we will assist you.

File Locations:

The program is installed in the "C:\Program Files\Directory Master" location by default. Under this directory are all of the application files necessary to run the program, as well as the membership directories and associated photos of member.

The Data directory contains subdirectories of each of the member directories you have created. When the program is first installed it includes the "_Members" and "_Sample" directories. If you have created any other directories they will be preceded by the "_" character, followed by the initial name you gave this directory.

Each of the member directories contain the database, which stores the information on each member. This is a file named members.mdb, which must not be altered unless using the Directory Master application. Doing so may result in the directory becoming non-operational.

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Under each of the member directories are two subdirectories, named "Photo" and "Reports." You may view and edit these files using third party software to view and make modifications. The following are more details on the contents and use of these files. However, do not delete the subdirectories as they are required for proper operation of your membership directory.

The photos subdirectory contains each of the photos for members, which are assigned numbers. These numbers correspond to the number assigned by the program. Refer to the Member Info. tab within the application and the Photo field will display the photo file assigned to that member. You may delete a photo file, but then when you go to that particular member in the database it will display "Picture Not Available", until you link another picture to that member. You may wish to edit these photos with a third part editing software, designed exclusively for the editing of jpg photo files. Edits such as removing red eye, cropping and color adjustments can be made. We recommend "Adobe Photo Shop Album" for such edits, which can be purchased from Adobe at www.adobe.com

The Reports subdirectory contains all of the pdf file reports you have created from within the program. You may open these with Adobe Acrobat Reader (a free program from Adobe www.adobe.com) or other such program. You may also edit these reports using the full Adobe Acrobat product or other similar product, as the Directory Master simply creates these files and emails them, but does not use them within the program for storing or retrieval of member information.

Technical Support:

Masterware Corporation provides free technical support by email at sales@masterwarecorporation.com for the the current major version of the product. The current version of your product is displayed in the caption of the program, which will be displayed such as "The Directory Master v1.6.4". For this example the current major version is "1" in the "1.6.4", whereas the "6.4" in the "1.6.4" indicates the minor release of the product. When the currently released major version changes, say from "1" to "2" then you may be required to upgrade to the new version for technical support to be able to assist you. When you request support please provide the following:

Your Name:

Your Phone Number:

Version of your Product:

Description of the problem you are having:

Make sure to include any error messages or error numbers displayed, if applicable. Also please tell us where you were in the program and what you were attempting to do when the error or problem occurred.

We normally respond within 24 hours, and often within 1 hour, of receiving your request. We typically respond by email, but may call you back to assist with your problem. The support method is entirely at our discretion as "The Directory Master" is designed to be a low cost, high quality program.