



Support. Service. Success.

***Programs:
How Patron Software Can Help***

PROGRAMS

Here's the scenario:

Your organization is adding a new class to your Summer Program.

You're wondering how you're going to manage all of the details.



**Will you be able to track enrollment,
instructors and fees collected?**

The following decisions have already been made:

- The beginning drama class, “**Be a Movie Star**” is for teens.
- The instructor is Tim Robertson.
- The location is the Westlake Community Building.
- The start date is 6/1 and the end date is 8/31.

Now you need to notify all of your teen members about your great new class, “*Be a Movie Star.*”

PROGRAMS

With Patron Software's easy-to-use **Lookup Form**, finding your teen members couldn't be easier!

The screenshot displays the 'Lookup Participant Records' interface. The main window has a 'Lookup Category' and 'Lookup Parameter' section. The 'Lookup Parameter' section includes radio buttons for 'Select Records that Match ALL Parameters' (selected), 'Select Records that Match ANY Parameter', and 'Display as List'. There are also checkboxes for 'Is Blank or Start Date or Low Range' and 'Is NOT Blank or End Date or High Range'. Below these are dropdown menus for 'Last Name', 'Name', 'Program', 'Class', 'Category', 'Street Address', 'City', 'State', and 'Zip Code'. A red arrow points to the 'Class' dropdown, which is circled in green. To the right, there is a 'Lookup Options' section with radio buttons for 'Create NEW Lookup', 'ADD TO Current Lookup', and 'REMOVE FROM Current Lookup', along with 'Refresh Lookup Parameters' and 'Clear Screen' buttons.

The 'Lookup Participants' window is open, showing details for a participant named Jonathan Chen. The 'Category' is 'Teen'. The 'Name' is 'Jonathan Chen'. The 'Status' is 'Active'. The 'Membership Start Date' is '6/1/2007' and the 'Expiration Date' is '5/31/2008'. The 'Address' is '880 Kirby Drive', 'City' is 'Carolina Beach', 'State' is 'NC', and 'Zip Code' is '28428'. The 'Home Phone' is '(910) 788-6588'. The 'Birthdate' is '6/7/1995', 'Gender' is 'Male', and 'Race' is 'Asian Pacific American'. The 'Family Income' is '\$20,000 - \$25,000' and the 'Family Configuration' is 'Living With Mother Only'. The 'Family Notes' state 'Jonathan lives with his father on the weekends'. There is a photo of Jonathan Chen and a 'Get Photo' button.

Patron Software found 86!

Now you have several options for contacting your target audience.

PROGRAMS

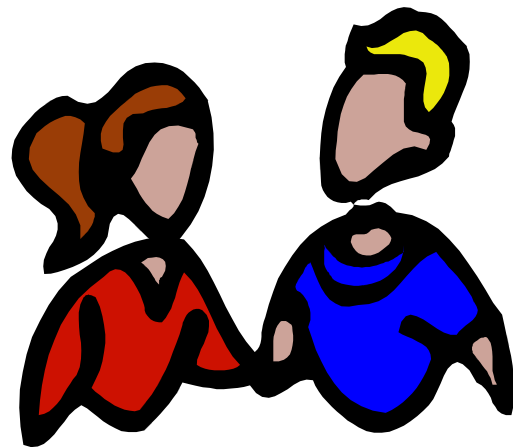
Next Steps...

Category = Teen

What do you want to do next?

Run Reports & Mailing Labels
Create Mail/Merge Document
Export to Excel
Export to .txt File
Add to a Distribution List
Send Email

With the **Next Steps Form**, you can...



PROGRAMS

1. Run a report to list contact information for making phone calls.

Community Outreach Opportunities, Inc. Participant Name and Address List Category = Teen			
<u>Name / Email</u>	<u>Address</u>	<u>Home / Mobile</u>	<u>Work / Fax</u>
Chen, Jonathan	880 Kirby Drive Carolina Beach, NC 28428	(910) 788-6555	
Chen, Sunny	880 Kirby Drive Carolina Beach, NC 28428	(910) 788-6555	
Smith, Joanne joanne@email.net	14 Main St. Anytown, NC 33822	(870) 333-7777	

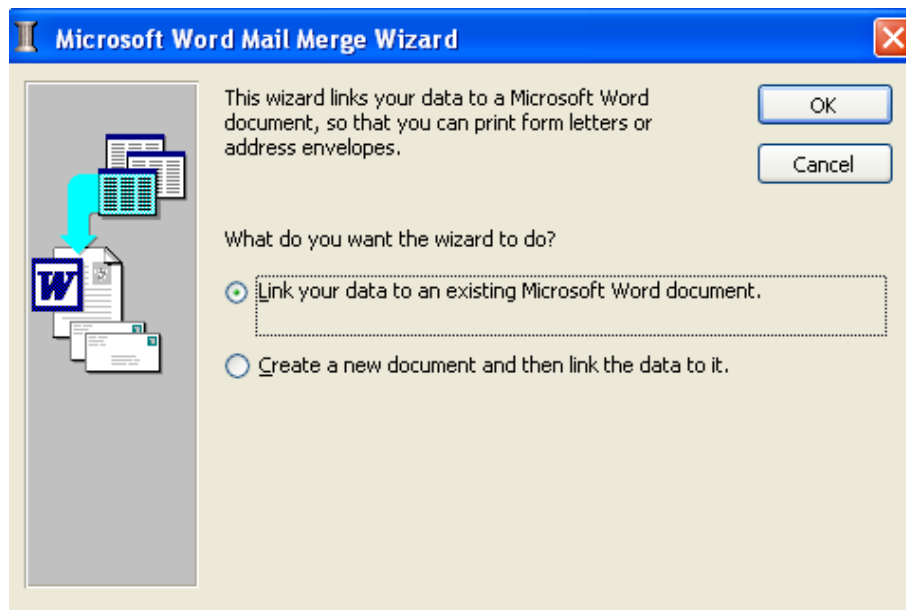
TIP: Use the *Patron Software* Print Toolbar to change page setup, print the report, email it as an attachment or publish it in MS Word.



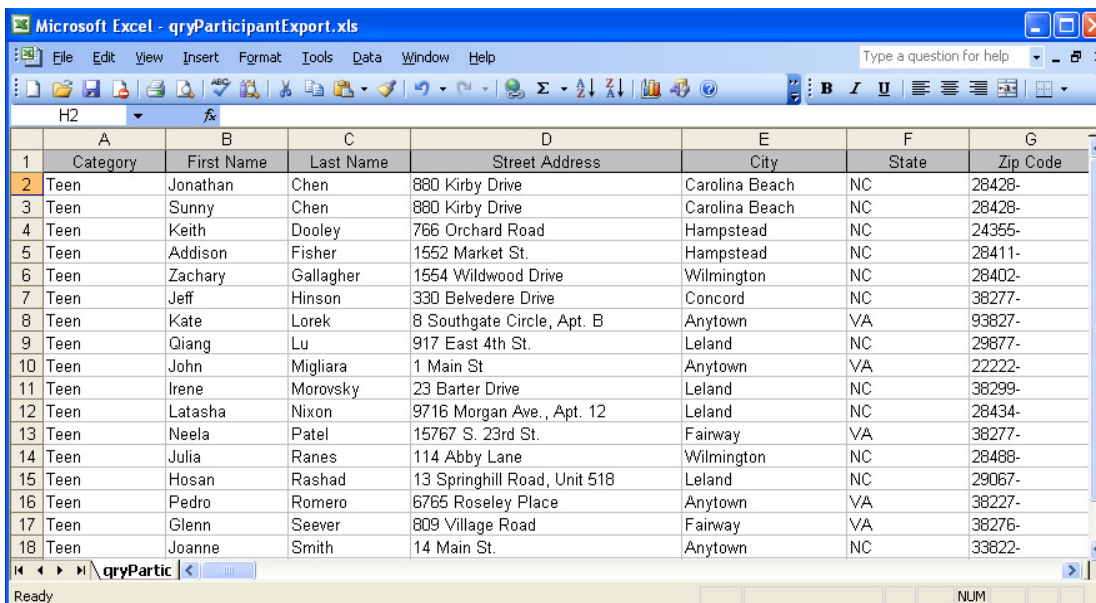
PROGRAMS

2. Select Create Mail/Merge Document to send a personalized letter.

Follow the **MS Word Mail Merge Wizard** instructions to link your selected *Patron Software* data to MS Word.



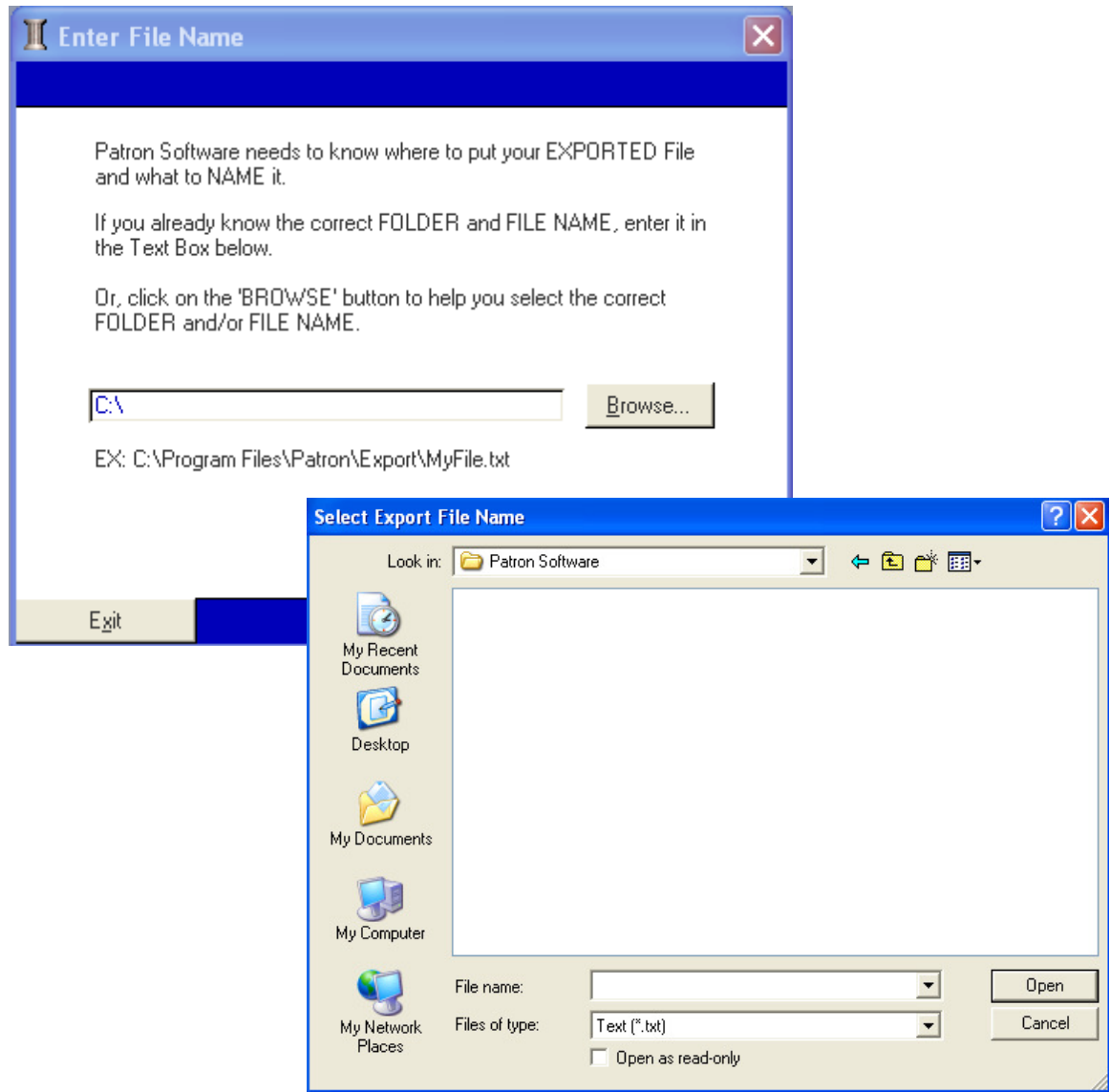
3. Or, click on Export to MS Excel to create a spreadsheet.



	A	B	C	D	E	F	G
1	Category	First Name	Last Name	Street Address	City	State	Zip Code
2	Teen	Jonathan	Chen	880 Kirby Drive	Carolina Beach	NC	28428-
3	Teen	Sunny	Chen	880 Kirby Drive	Carolina Beach	NC	28428-
4	Teen	Keith	Dooley	766 Orchard Road	Hampstead	NC	24355-
5	Teen	Addison	Fisher	1552 Market St.	Hampstead	NC	28411-
6	Teen	Zachary	Gallagher	1554 Wildwood Drive	Wilmington	NC	28402-
7	Teen	Jeff	Hinson	330 Belvedere Drive	Concord	NC	38277-
8	Teen	Kate	Lorek	8 Southgate Circle, Apt. B	Anytown	VA	93827-
9	Teen	Qiang	Lu	917 East 4th St.	Leland	NC	29877-
10	Teen	John	Migliara	1 Main St	Anytown	VA	22222-
11	Teen	Irene	Morovsky	23 Barter Drive	Leland	NC	38299-
12	Teen	Latasha	Nixon	9716 Morgan Ave., Apt. 12	Leland	NC	28434-
13	Teen	Neela	Patel	15767 S. 23rd St.	Fairway	VA	38277-
14	Teen	Julia	Ranes	114 Abby Lane	Wilmington	NC	28488-
15	Teen	Hosan	Rashad	13 Springhill Road, Unit 518	Leland	NC	29067-
16	Teen	Pedro	Romero	6765 Roseley Place	Anytown	VA	38227-
17	Teen	Glenn	Seever	809 Village Road	Fairway	VA	38276-
18	Teen	Joanne	Smith	14 Main St.	Anytown	NC	33822-

PROGRAMS

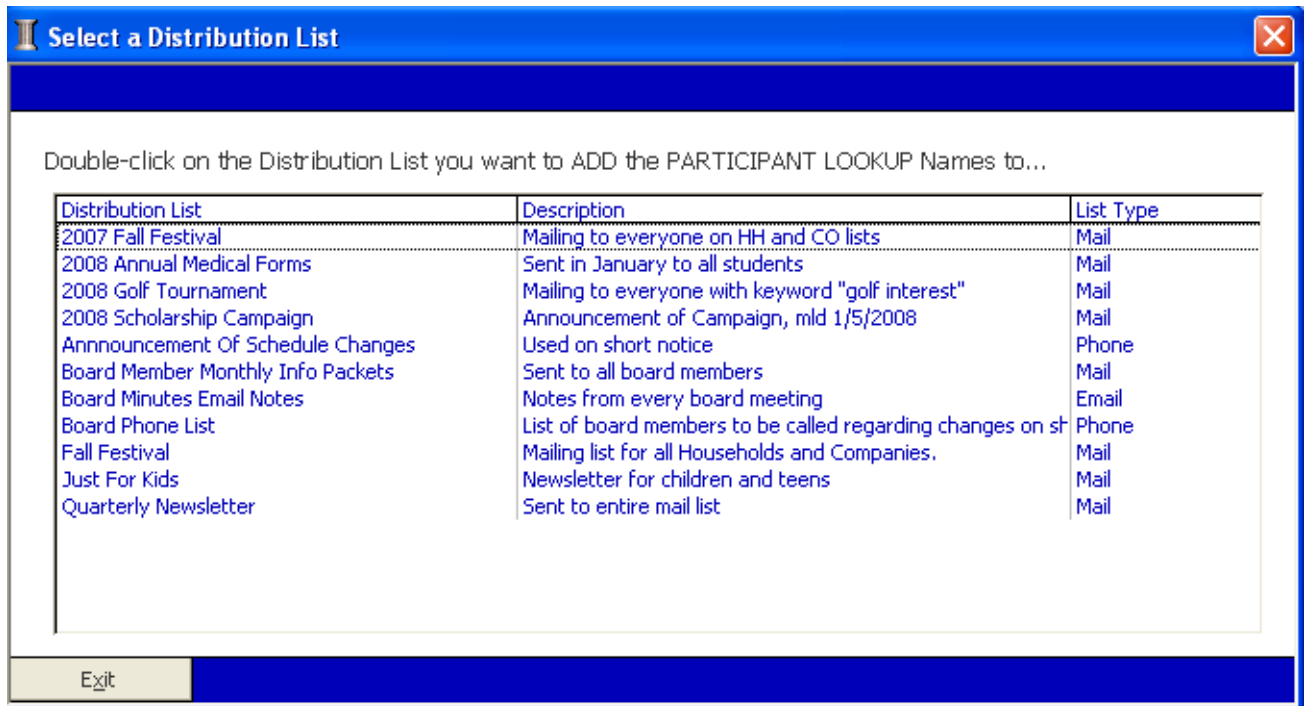
4. Choose Export to a .txt File to create a flyer using a program like Corel Paint Shop or Adobe PhotoShop.



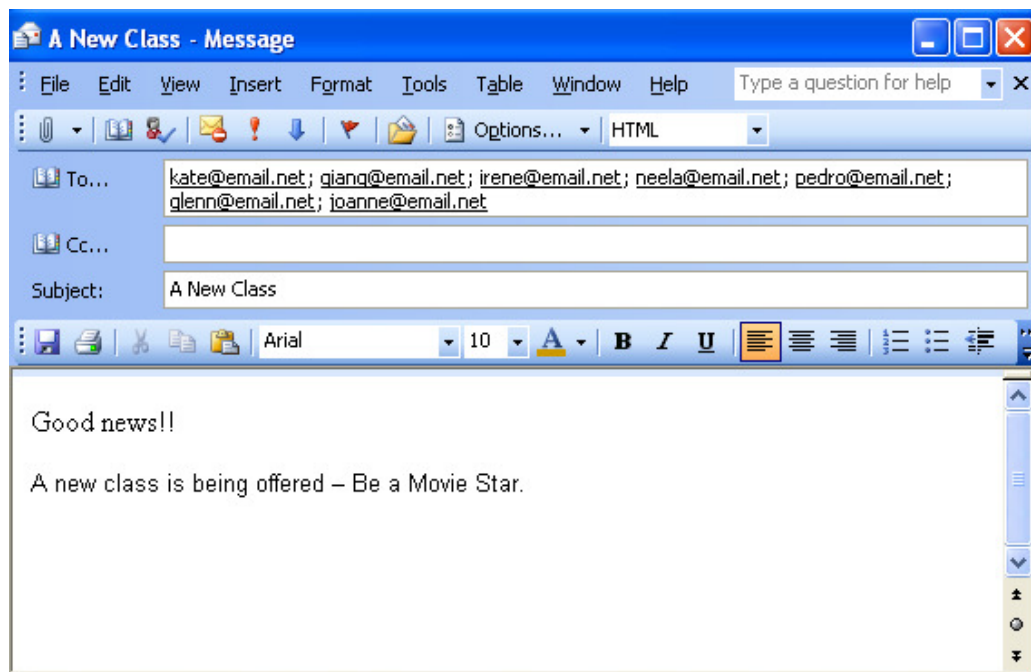
Or, send the text file to a professional printer and let him do it for you!

PROGRAMS

5. Add the selected names and addresses to a Distribution List announcing the new class.



6. Or last, but not least, select Send Email.



PROGRAMS

Get ready to enroll students in “**Be a Movie Star.**”



PROGRAMS

Use the **Add Class Form** and include information on class location, start and end dates, funding sources and instructors.

Add Class Information

Program:

Class: Open for Enrollment

Location:

Start Date: End Date:

Category:

Description:

Funding Sources

1. Additional Funding Source(s)

2.

3.

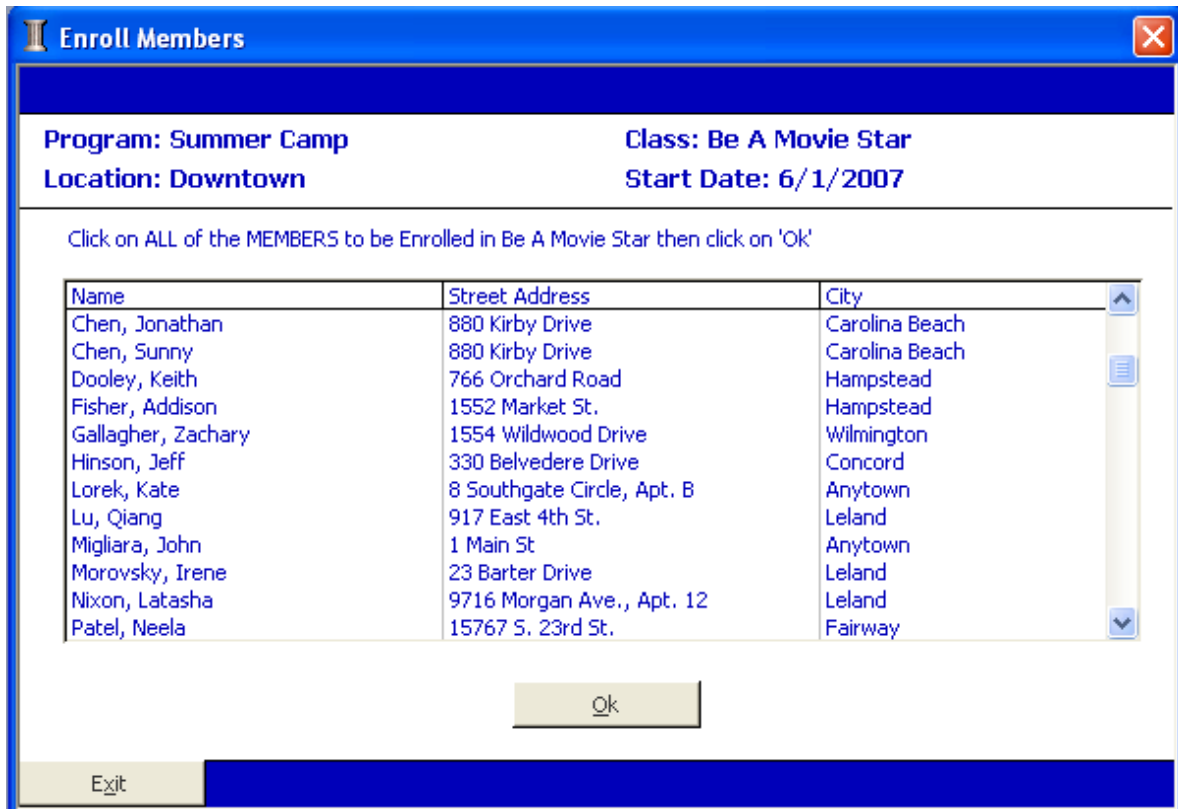
Instructors

	1.	2.
Name:	<input type="text" value="Tim Robertson"/>	<input type="text"/>
Phone #:	<input type="text" value="(766) 333-9922"/>	<input type="text"/>
Email:	<input type="text" value="tim@email.net"/>	<input type="text"/>

Notes:

PROGRAMS

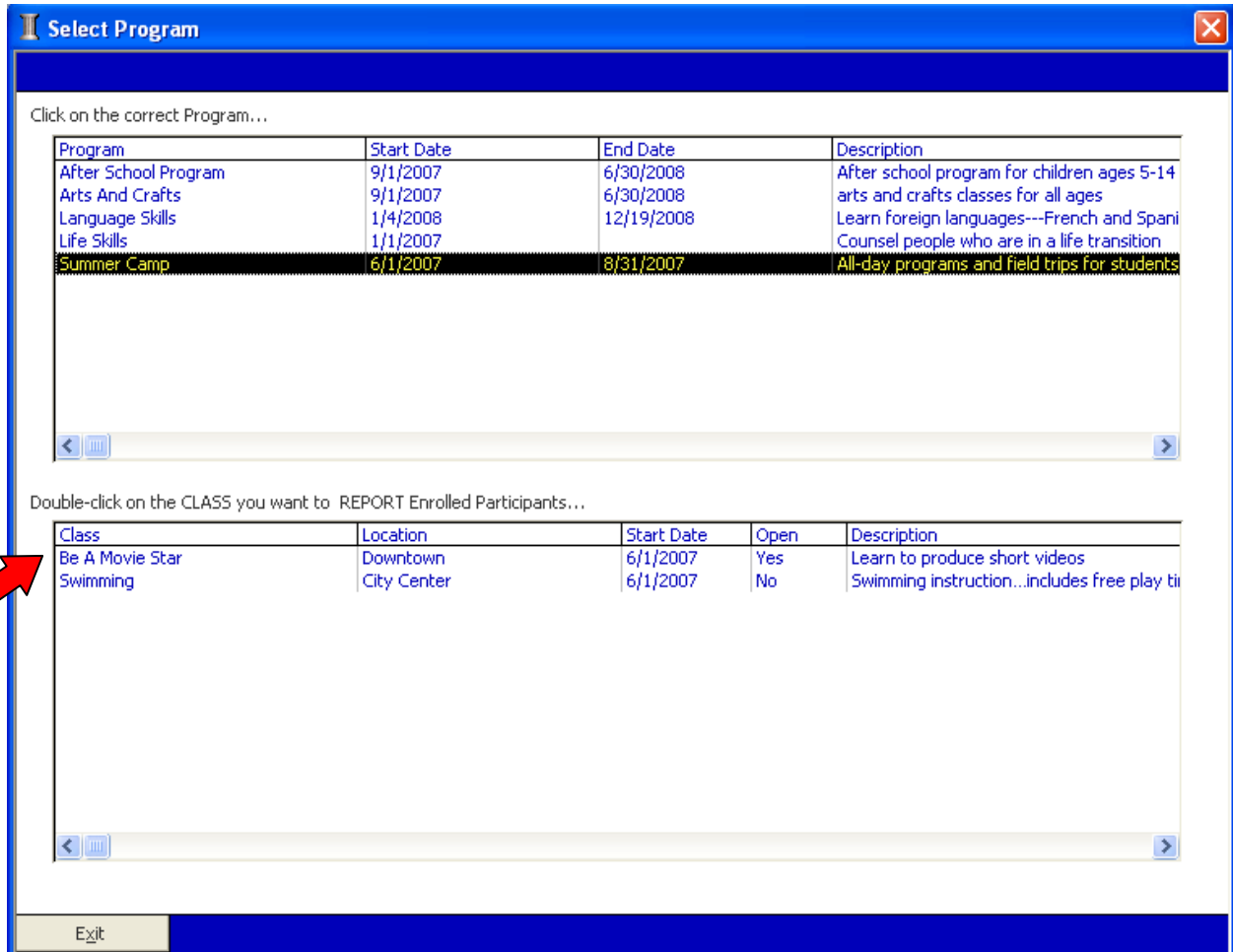
Enroll students in the class with just a couple clicks of your mouse!



The instructor for “**Be a Movie Star**” needs a list of all students enrolled in the class.

PROGRAMS

Just click on **Summer Camp**,
and then double-click on **Be a Movie Star...**



...and a list of class members and their contact information is ready!

PROGRAMS

Community Outreach Opportunities, Inc. Program / Class Enrollment Report

Summer Camp

Be A Movie Star

Downtown

Start Date:

6/1/2007

End Date:

8/31/2007

Name / Email

Address

Home / Work / Mobile #'s

Morovsky, Irene
irene@email.net

23 Barter Drive
Leland, NC 38299

(810) 338-2299
(810) 388-2299
(810) 493-7722

Vanderbrink, Sally

4701 Westgate Road
Anytown, NC 38922

(819) 222-7653

Hinson, Jeff

330 Belvedere Drive
Concord, NC 38277

(810) 222-6633

Nixon, Latasha

9716 Morgan Ave., Apt. 12
Leland, NC 28434

(710) 332-4767

Gallagher, Zachary

1554 Wildwood Drive
Wilmington, NC 28402

(910) 866-2222

Fisher, Addison

1552 Market St.
Hampstead, NC 28411

(910) 212-5001

Chen, Sunny

880 Kirby Drive
Carolina Beach, NC 28428

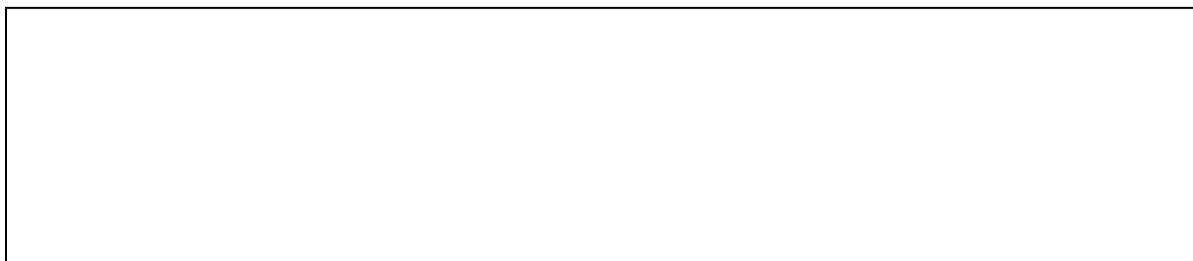
(910) 788-6555

Smith, Joanne
joanne@email.net

14 Main St.
Anytown, NC 33822

(870) 333-7777

Or, the instructor can print a detailed report listing ALL
information about each student or participant.



PROGRAMS

Community Outreach Opportunities, Inc. Participant List (Complete)

Name: Sunny Chen

Address: 880 Kirby Drive
Carolina Beach, NC 28428

County: New Hanover

Start Date: 5/4/2007
Expiration Date: 5/3/2008
Renewal Date:

Phone #'s and Email

Home: (910) 788-6555
Work
Fax:
Mobile:
Email:

Keywords

Music Activities
Free Lunch Program

Work / School Information

Employer:
Occupation:

Student:
Grade / Level: Third Grade
School: Haywood Elementary School
Address: 896 Mckaig Road
Carolina Beach, NC 28428

Phone #: (910) 777-2222
Fax #: (910) 777-4444
Special Interests:

Other

Photo Release
Child

Referred By: Social Services
Category: Teen
Status: Active

Has Transportation:
Transportation Method: After-school Van

Demographics

Gender: Female
Birthdate: 9/12/2000
Race: Asian Pacific American
Marital Status:

Family Income: \$20,000 - \$25,000
Family Configuration: Living With Mother Only
Family Notes:

Legal Guardian #1

Relationship to P:
Name: Stephanie Chen
Address: 880 Kirby Drive
Carolina Beach, NC 28428

Home Phone: (910) 788-6555
Mobile:
Email: stephenie@email.net
Employer: B P Station
Work Phone: (910) 777-2345
Contact at Work:

Legal Guardian #2

Mother Father
Sandy Chen
399 Chenoweth Ct.
Carolina Beach, NC 28428

(910) 876-5555
(910) 786-2534
Sandy@email.net
City Sanitation Services
(910) 777-6666

PROGRAMS

Community Outreach Opportunities, Inc. Participant List (Complete)

Name: Sunny Chen

Address: 880 Kirby Drive
Carolina Beach, NC 28428

Authorized to Pickup #1

Relationship to P: Mother
Name: Stephanie Chen
Address: 880 Kirby Drive
Carolina Beach, NC 28428

Phone: (910) 788-6555

Authorized to Pickup #3

Relationship to P: Aunt
Name: Connie Chen
Address: 315 Chenoweth Ct.
Carolina Beach, NC 28428

Phone: (910) 888-6644

Emergency Contact #1

Relationship to P: Mother
Contact Name: Stephanie Chen
Address: 880 Kirby Drive
Carolina Beach, NC 28428

Home Phone: (910) 788-6555
Mobile: (910) 765-2288
Work Phone: (910) 666-5544

Medical Information

Convulsions

Diabetes

Drug or Alcohol

History of Abuse

Other ADD---takes ritalin

Under Doctor's Care

Medical Allergies

Food Allergies

Restrictions

On Medication

Heart Problems

Asthma

History of Violence

allergic to sulfa drugs

allergic to peanuts

Preferred Hospital: North Hills Hospital

Preferred Doctor: Dr. Taylor

Address: 1444 University Drive
Wilmington, NC 28444

Phone: (910) 777-6655

Authorized to Pickup #2

Grandfather
Samuel Chen
315 Chenoweth Ct.
Carolina Beach, NC 28428

(910) 666-2255

Pickup Instructions

Emergency Contact #2

Grandfather
Samuel Chen
315 Chenoweth Ct.
Carolina Beach, NC 28428

(910) 777-6666

(910) 333-2222

Insurance Carrier: Medicaid

Insurance #: 89-777

Previous Illnesses:

Disability

Disability Type: Impaired Vision

Description: wears glasses

Medical Notes:

Condition Notes:

PROGRAMS

With *Patron Software*, entering and tracking enrollment fees is easy.

Print a receipt for payment received at the same time you record the transaction.

Participant Transactions

Participant: Fisher, Addison
Address: 1552 Market St.

Split Transaction Total Amount Received:

Reference / Check / Credit Card #:

Transaction Date:

Transaction Type:

Payment Method:

Received From:

Event:

Activity:

Program:

Class:

Tickets, Activities, Items Purchased or Attendees:

Amount:

Tax Deductible Amount:

Donated Item's Fair Market Value:

Pledge Amount: Pledge Reference #:

Print Thank You Letter

Thank You Letter Salutation:

Print a Receipt

Update Participant's Renewal Date

Notes:

Each receipt is given a unique number.

PROGRAMS

The person who receives payment signs on the 'Received By' line.

Community Outreach Opportunities, Inc.	
Addison Fisher 1552 Market St. Hampstead, NC 28411	
<u>Transaction Date:</u> 5/15/2007	<u>Receipt #:</u> 5/15/2007-3/4 
<u>Transaction Type:</u> Enrollment	
<u>Amount Received:</u> \$45.00	
<u>Payment Method:</u> Check	
<u>For:</u>	<u>Program:</u> Summer Camp
	<u>Class:</u> Be A Movie Star
	<u>Event:</u>
	<u>Activity:</u>
<u>Received From:</u> Mrs. Fisher	
Notes:	
<u>Received By:</u>	

Receipts can easily be reprinted.

It's the first day of class.

PROGRAMS

The instructor needs to assess student reading skills.

Each student is given a script to read aloud.

Possible assessment outcomes are:

- Read with Confidence
- Barely Audible
- Read Haltingly
- Lacks Self-confidence



The instructor sets a goal for each student which will be evaluated during the final class.

With *Patron Software*, documenting assessment results is easy.

PROGRAMS

With the **Class Assessment Form**, the instructor can document each student's skill and/or behavior at the first class, and then again, at the final class.

Additionally, a goal can be set for each student. The instructor can determine at the final class, whether or not the goal has been met.

Enter as many notes and explanations as needed.

Class Participant Assessment	
Summer Camp / Be A Movie Star / Downtown 6/1/2007 - 8/31/2007 Fisher, Addison	
Pre Class Assessment	Post Class Assessment
Assessment Date: <input type="text" value="6 /1 /2007"/>	<input type="text"/>
Test Given: <input type="text" value="Our Town script"/>	<input type="text"/>
Administered By: <input type="text" value="Tim Robertson"/>	<input type="text"/>
Test Location: <input type="text" value="Downtown"/>	<input type="text"/>
Assessment	Assessment
1. <input type="text" value="Read In Halting Manner"/>	1. <input type="text"/>
2. <input type="text" value="Lacks Confidence"/>	2. <input type="text"/>
3. <input type="text"/>	3. <input type="text"/>
Pre Class Assessment Notes: <input type="text" value="Addison has good reading skills but lacks confidence."/>	Post Class Assessment Notes: <input type="text"/>
Goal: <input type="text" value="I want Addison to be more comfortable speaking in front of a group and to improve her confidence."/>	Goal Met: <input type="checkbox"/> Explanation: <input type="text"/>
General Notes: <input type="text" value="6/1/2007 - Addison is willing and able to follow directions, but is quite shy."/>	
<input type="button" value="Update Assessment Record"/>	
<input type="button" value="Exit"/>	

PROGRAMS

Recording class attendance is as easy as entering a date and clicking on each attendee's name.

With *Patron Software*, you can easily generate an attendance report by class or by individual student.

Class Attendance

Summer Camp / Be A Movie Star / Downtown
6/1/2007 - 8/31/2007

Attendance taken on these dates --> **Date**

- 6/27/2007
- 7/11/2007
- 7/18/2007
- 7/25/2007
- 8/1/2007
- 8/8/2007
- 8/15/2007

Enter Class Date:

Click on a DATE to view the list of ATTENDEES.

Click on ALL PARTICIPANTS who attended CLASS on the above CLASS DATE...

Name	Street Address	City
Chen, Sunny	880 Kirby Drive	Carolina Beach
Fisher, Addison	1552 Market St.	Hampstead
Gallagher, Zachary	1554 Wildwood Drive	Wilmington
Hinson, Jeff	330 Belvedere Drive	Concord
Morovsky, Irene	23 Barter Drive	Leland
Nixon, Latasha	9716 Morgan Ave., Apt. 12	Leland
Smith, Joanne	14 Main St.	Anytown
Vanderbrink, Sally	4701 Westgate Road	Anytown

PROGRAMS

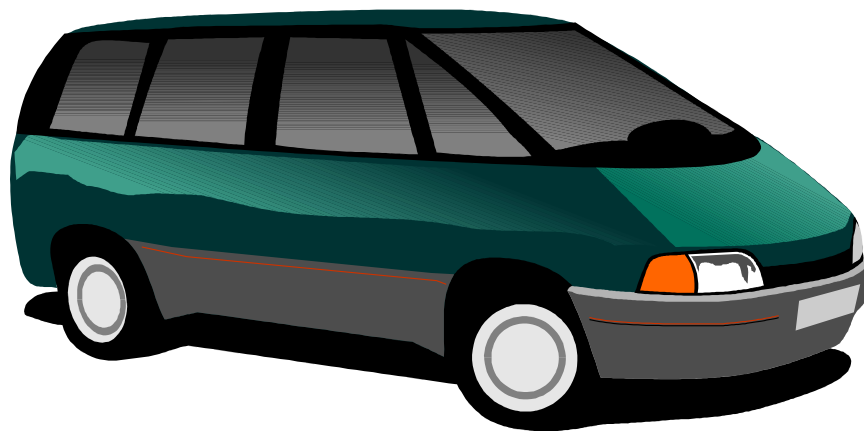
Here's the scenario:

Class is in session and everyone is having a great time learning how to “**Be a Movie Star.**”

The instructor has scheduled a field trip for the class to participate in a docudrama being filmed next Monday.

How are you going to find the chaperones and transportation needed?

With *Patron Software*, you can easily and quickly identify all volunteers who are available on Monday, who have a 7-passenger van and are interested in being a chaperone.



PROGRAMS

Volunteer Name	Address	Phone / Work / Email	Send Email
Alexander, Jessica	698 Norman Lane Fairway NC 27885-	(788) 657-3221 (603) 444-3789 2 jessica@email.net	
Gallagher, Kay	1554 Wildwood Drive Wilmington NC 28402-	(910) 866-2222 (910) 866-7777 4 karen@email.net	
Hallett, Andrew	1220 Cedar Lane Wilmington NC 28407-	(910) 543-7722 (970) 666-2222 11 andy@email.net	

Patron Software found three volunteers who fit the selected criteria.

Now you can contact each volunteer by phone or email.



PROGRAMS

All three volunteers survived the field trip!

With *Patron Software*, you can easily track volunteer hours.

Patron Software keeps a running total of all hours worked by each volunteer.

Apply Volunteer Hours for Volunteer Gallagher, Kay

Total Hours Worked: 4
Current
Number of Vouchers R

Date Worked: 7/16/2007
Number of Hours Worked: 6.5
Location: Downtown
Service Area: Chaperone
Event:
Activity:
Program: Summer Camp
Class: Be A Movie Star

Notes:
Kay is an excellent driver and the kids really liked her.

Update Volunteer Hours

Exit

Volunteer Work Validation
6.5 WORK HOURS were successfully APPLIED for Gallagher, Kay.
OK

Use the **Voucher Distribution** function to reward volunteers at predetermined intervals (e.g., for every 5 volunteer hours accumulated, a \$10 gift certificate is awarded).

PROGRAMS

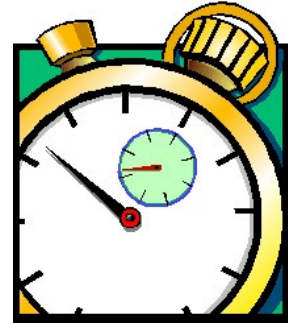
By entering the post-class assessment, the instructor can easily monitor each student's progress.

Class Member Assessment	
Summer Camp / Be A Movie Star / Downtown 6/1/2007 - 8/31/2007 Fisher, Addison	
Pre Class Assessment	Post Class Assessment
Assessment Date: <input type="text" value="6 /1 /2007"/>	<input type="text" value="8 /31/2007"/>
Test Given: <input type="text" value="Our Town script"/>	<input type="text" value="Our Town script"/>
Administered By: <input type="text" value="Tim Robertson"/>	<input type="text" value="Tim Robertson"/>
Test Location: <input type="text" value="Downtown"/>	<input type="text" value="Downtown"/>
Assessment	Assessment
1. <input type="text" value="Read In Halting Manner"/>	1. <input type="text" value="Read Smoothly"/>
2. <input type="text" value="Lacks Confidence"/>	2. <input type="text" value="Enthusiastic"/>
3. <input type="text"/>	3. <input type="text"/>
Pre Class Assessment Notes:	Post Class Assessment Notes:
<input type="text" value="Addison has good reading skills but lacks confidence."/>	<input type="text" value="Addison has shown great improvement in self-confidence and leadership ability."/>
Goal:	Goal Met: <input checked="" type="checkbox"/>
<input type="text" value="I want Addison to be more comfortable speaking in front of a group and to improve her confidence."/>	Explanation: <input type="text" value="Addison presents herself with confidence."/>
General Notes:	<input type="text" value="6/1/2007 - Addison is willing and able to follow directions, but is quite shy."/>
	<input type="text" value="8/31/2007 - Addison has taken a leadership role within the group and seems to have gotten over her shyness."/>
<input type="button" value="Update Assessment Record"/>	
<input type="button" value="Exit"/>	

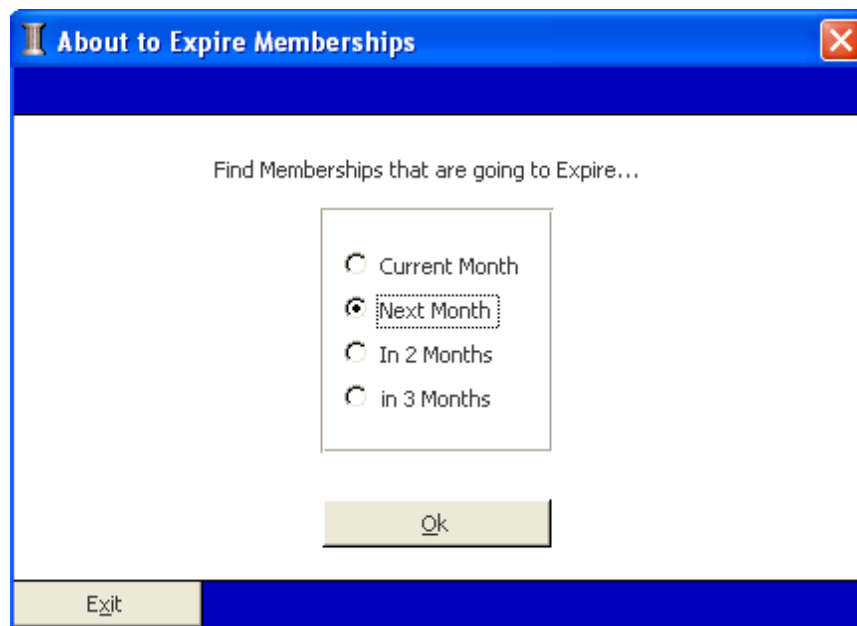
PROGRAMS

Many organizations collect annual membership dues.

How do you know when a membership is about to expire?



With *Patron Software*, you can easily identify memberships that are about to expire.



PROGRAMS

Distribute the list of “About to Expire” membership contact information to the person or volunteer in your organization responsible for memberships.

Community Outreach Opportunities, Inc.
Memberships Expiring Between
7/1/2007 and 7/31/2007

<u>Expiration Date</u>	<u>Name / Email</u>	<u>Address</u>	<u>Phone #'s</u>	<u>Start Date</u>
7/3/2008	Sunny Chen	880 Kirby Drive Carolina Beach, NC 28428	Home: (910) 788-6555	6/1/2006
7/31/2008	Jonathan Chen	880 Kirby Drive Carolina Beach, NC 28428	Home: (910) 788-6555	6/1/2006
7/31/2008	Addison Fisher	1552 Market St. Hampstead, NC 28411	Home: (910) 212-5001	6/1/2006
7/23/2008	Jeff Hinson	330 Belvedere Drive Concord, NC 38277	Home: (810) 222-6633	6/1/2006
7/30/2008	Latasha Nixon	9716 Morgan Ave., Apt. 12 Leland, NC 28434	Home: (710) 332-4767	6/1/2006

Total Memberships Expiring: 5

Or... use the **Participant Lookup Form** to identify these members and send a renewal reminder.

PROGRAMS

With *Patron Software*, you can store much more information than addresses, phone numbers and email addresses.

We know how important it is to be able to provide statistical data when applying for grants.

Some of the optional data fields available include:

- Age
- Gender
- Race
- Family income
- Family configuration
- Special needs
- Medical conditions
- Marital status
- History of violence or drug abuse

and more...

PROGRAMS

We also know how important it is to provide for the safety of your program and class participants.

Patron Software helps you protect your students and participants by providing data fields for:

- Legal guardian contact information
- Emergency contact names and phone numbers
- Who's authorized to pick up the member
- Pickup instructions
- Medical history
- Food allergies
- Medical allergies
- Current medication
- Insurance information
- Physician name and address
- Activity restrictions

and more...

PROGRAMS

Thank you for attending *Patron Software's* Programs presentation!



We hope you've seen how *Patron Software* can help you not only with the day-to-day management of your organization, but also with difficult tasks such as grant applications and membership management.

PROGRAMS

If you believe that *Patron Software* may be right for you, your staff and your organization, please contact us.

We will be happy to answer your questions about *Patron Software* and your record-keeping needs.

(877) 898-3981

info@patronsoftware.com

**Patron Software, Inc.
201 Lawton Circle
Wilmington, NC 28412**

Thank you!