Lenoir Service League

Database How-To Guide

Member & Board User Guide

Welcome to the new **Lenoir Service League database!**

The database is designed to make it easier to keep member information current, communicate with members, organize important documents, manage committees, and provide a central place for League information.

🔐 1. Logging In

Access the Database

1. Go to **LenoirServiceLeague.org**.
2. Click **Members Login**.
3. Enter your username and password.
4. If this is your first time logging in, use the temporary credentials provided to you.
5. **Change your password after your first login.**

> **Important:** Never share your password with another person. Each member should have their own login.

Your Access Level

What you can see and change depends on your role within the League.

- **Members** can update their own information and access information available to members.
- **Board members/authorized users** may have additional access to member records, files, committees, and administrative functions.

👤 2. Update Your Personal Information

Keeping your information current helps the Lenoir Service League stay connected with you. You do not have to do your own, but if you are interested in being in the database, it does help!

From the database, go to **My Data**.

📸 Update Your Photo

1. Select **My Data**.
2. Edit Member
3. Go to the **Photo** tab.
4. Upload a current photo.
5. Replace or delete your photo when needed. (Click the checkbox to delete and then click Save)
6. Click Save for the Upload or Delete to confirm

A current photo makes it easier for members to recognize one another in the directory.

📞 Update Contact Information

Go to **My Data** → **Edit Member** → **Contact**.

You can update information such as:

- Email address
- Phone number
- Mailing address
- Other contact information

Be sure to save your changes.

💼 Partner Information

The **Partner** section can be used to enter business information for your spouse/partner, when applicable.

🔑 Change Your Login Information

Use the **Login** section to update your:

- Username/email
- Password

Tip: Choose a secure password that you don't use for other accounts.

🏠 3. Understanding the Main Navigation

The database contains several sections to help you find information quickly.

My Data

Your personal member information.

My Club

Information and tools related to the Lenoir Service League.

Club Members

The League's member directory and member records.

Pmail

Send email communications to League members.

Files

Access important League documents and files.

Committees

View and manage League committees and committee members.

Reports

Generate information and lists from the database.

Calendar

View League events and important dates.

👥 4. View & Manage Club Members

Board members and authorized users can manage member records through **Club Members**.

View Members

1. Go to **My Club**.
2. Select **Club Members**.
3. Browse or search the member list.
4. Select a member to view their information.

Editing a Member

Authorized users can update another member's information when necessary.

This can be helpful when:

- A member changes their email address
- A phone number needs to be corrected
- A member provides updated contact information
- Other membership information needs to be corrected

> **Security Reminder:** Only users with the appropriate access level can edit another member's information.

🔄 5. Managing Member Status

The database allows the Lenoir Service League to keep member status accurate.

Depending on the member's situation, an authorized user may be able to change a member between statuses such as:

- **Active**
- **Sustainer**

When a Member Leaves

The **Termination** function can be used when a member leaves the League.

This removes the member from active membership while preserving their record.

If a Member Returns

A previously terminated member can be **reinstated** rather than creating an entirely new member record.

Best Practice: Always update the existing member record whenever possible so the League retains accurate historical information.

✉️ 6. Sending Emails with Pmail

Pmail makes it easy to send personalized email messages to Lenoir Service League members directly from the database. The emails sent from pmail come straight to your email inbox where you normally check your email.

You can use Pmail for:

- League announcements
- Meeting reminders
- Committee communications
- League Event information
- Important updates
- Member newsletters

Send a Pmail

1. Go to **My Club**.
2. Select **Pmail**.
3. Click To
    a. Select Member Types to send to Members or Sustainers
        i. This is broken down by member types
    b. Select a committee to send to the members on the committee
4. Choose the members who should receive the message.
5. Compose your email.
6. Review the message.
7. Send.

This means you don't have to manually create an email list every time you need to contact a group.

✨ Personalize Your Emails

Pmail can use **tags** to automatically insert information such as a member's name.

For example, instead of:

> Hello Member,

you can use a personalization tag so the recipient receives something like:

> Hello Susan,

This makes League communications feel more personal while still allowing you to send one message to many people.

📊 Track Your Emails

Pmail provides tracking information that can help you determine:

- Who received the message
- Who opened/read the message
- Who may need a follow-up

This can be particularly useful for important announcements or meeting communications.

📁 7. Organize League Files

The **Files** section provides a central location for Lenoir Service League documents.

Instead of keeping important documents scattered across individual computers, emails, or shared drives, the database can serve as a central document repository.

Two Types of Files

🌐 Public Files

Public files can be accessed without logging into the database and may be indexed by search engines.

Use these for information intended for the general public.

🔒 Secure Files

Secure files require a member login.

Use these for information intended only for League members, such as:

- Meeting minutes
- Board minutes
- Internal documents
- Member resources
- Other confidential League information

📂 8. Organize Files with Folders

Creating folders keeps documents easy to find.

A suggested structure for meeting minutes is:

Minutes

- **2026**
  - Board Meetings
  - General Membership Meetings
- **2027**
  - Board Meetings
  - General Membership Meetings
- **2028**
  - Board Meetings
  - General Membership Meetings

Uploading a Document

1. Go to **Files**.
2. Navigate to the appropriate folder.
3. Select the option to upload a file.
4. Select the document from your computer.
5. Confirm the upload.
6. Make sure it appears in the correct folder.

📌 Best Practice

Use clear, consistent file names.

For example:

Board Meeting Minutes – August 2026

rather than:

Minutes8-11

Consistent naming makes documents much easier to locate later.

** If you are trying to upload files and cannot, contact Elizabeth Kirby

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👥 9. Manage Committees

The **Committees** section helps the Lenoir Service League keep track of committee assignments and leadership.

Examples may include:

- Communications Committee
- Membership Committee
- Thrift Store Committee
- Fundraising Committee
- Other League committees

View Committees

1. Go to **Committees**.
2. Select the committee you want to view.
3. Review the members and positions assigned to that committee.

Add a Member to a Committee

Authorized users can:

1. Open the appropriate committee.
2. Select the option to add a member.
3. Search for the member.
4. Add the member.
5. Assign their appropriate position or role, if applicable.

Remove a Member

When a member leaves a committee:

1. Open the committee.
2. Locate the member.
3. Remove them from the committee.
4. Update their replacement, if applicable.

Keeping committee assignments current ensures that communications and responsibilities are accurate.

🗂️ 10. Managing Committee Positions

Committees can also be used to track **specific positions and roles**.

For example:

Communications Committee

- Chair
- Co-Chair
- Committee Member

Keeping positions updated makes it easier to identify who is responsible for specific duties and ensures communications reach the right people.

⭐ Best Practices for Everyone

Keep Your Information Current

Update your email, phone number, address, and photo whenever something changes.

Use Your Own Login

Don't share your username or password with other members.

Keep Files Organized

Save documents in the correct folder and use consistent file names.

Use Secure Files for Member Information

Don't place internal or member-only documents in public folders.

Keep Committees Updated

When committee assignments change, update the database promptly.

Use Pmail Instead of Personal Email Lists

Whenever possible, use Pmail so member communications can be managed centrally.

Explore!

The best way to become comfortable with the database is to use it. Take some time to click through the different sections and become familiar with where information is located.

🆘 Need Help?

If you aren't sure how to complete a task or notice information that needs to be corrected, contact the Elizabeth Kirby, 828-320-7417 (text is fastest) or email eanorris1106@gmail.com

Remember: The database is a shared resource for the entire Lenoir Service League. Keeping information accurate and organized helps everyone!

📌 Quick Reference

I want to…	Go to…
Update my information	**My Data**
Change my photo	**My Data → Edit Member→ Photo**
Change my password	**My Data → Edit Member→Login**
View members	**My Club → Club Members**
Send an email	**My Club → Pmail**
Find League documents	**Files**

Upload meeting minutes	**Files → Minutes**
View committees	**Committees**
Add/remove committee members	**Committees**
Manage committee roles	**Committees**
View League information	**My Club**
Access events	**Calendar**

🎉 Welcome to the Lenoir Service League Database!

This new system is designed to make League information **easier to access, easier to manage, and easier to keep up to date — all in one place.**