



# MOSES

A Membership-Oriented Synagogue Enterprise System

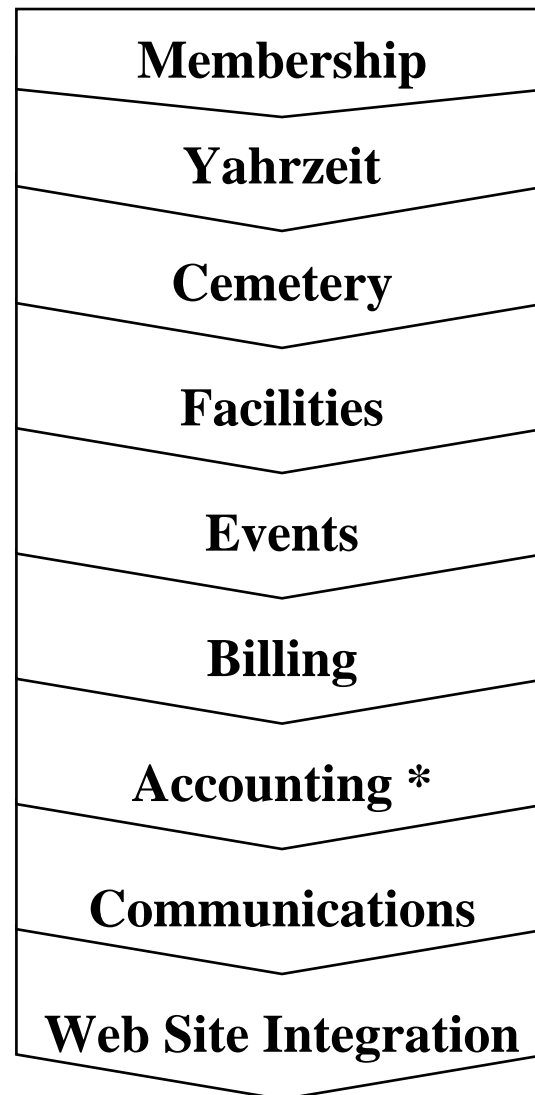
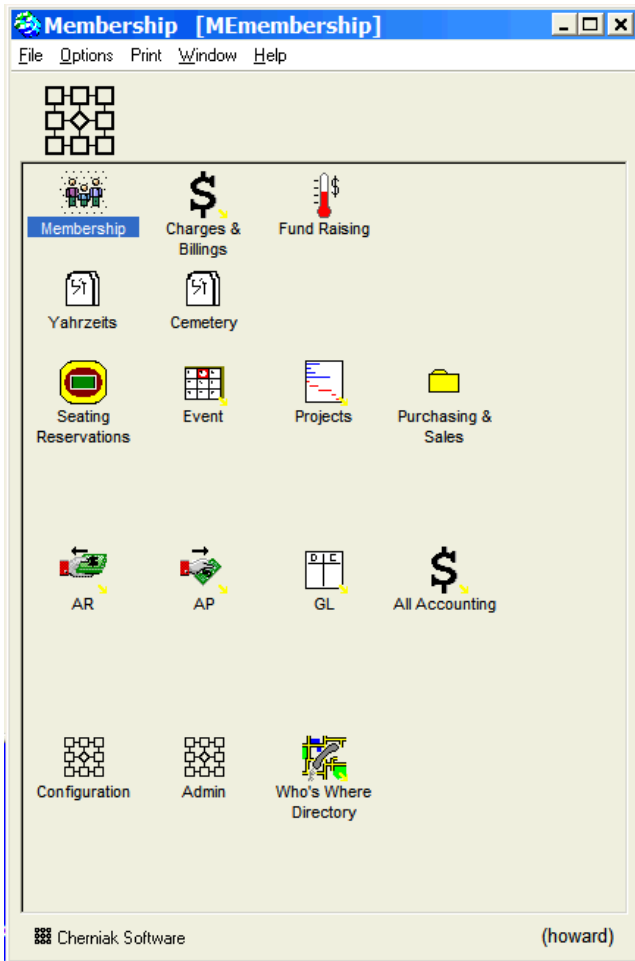
NAASE, The International Convention

Toronto, Ontario

March 17, 2004



# MOSES: a set of tightly integrated modules

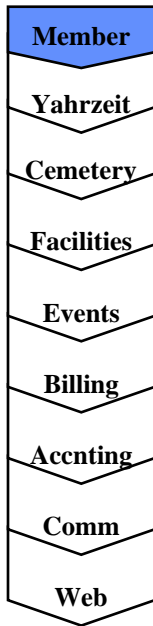


\* AR, AP, GL, Bank Rec



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# MOSES' foundation is membership



- See what is and has been happening with any member family or individual
- Keep a photo of each member to print on tickets or badges
- Track members' skills e.g. Torah reading capabilities
- Record members activities', e.g. committee memberships
- Track members by other factors
  - Events attended
  - Demographics, e.g age groupings
  - Tribe



# A sample member screen



- Member
- Yahrzeit
- Cemetery
- Facilities
- Events
- Billing
- Accounting
- Comm
- Web

File Actions Print User Reports Other Update Window Help

Member ID: Eban, Abba & Suzy Member Phone: (716) 456-7890 (15)

### 1. General

Name: Mr. & Mrs. Abba Eban  
 Salutation: Mr. & Mrs. Eban  
 Informal: Abba & Suzy  
 Main Address: 100 Main Street; Buffalo NY 12345, USA (716) 456-7890  
 Status: Active Since: Thu Jan 2/2003  
 Dues Category: Regular member  
 Married: Fri Jul 21/1961

Individuals

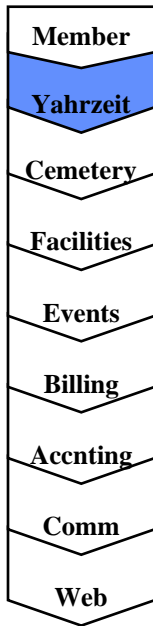
Surname	First	Middle	Age
Eban	Suzy		F 61
Eban	Abba		M 89
Eban	Gila		F 22
Eban	Eli		M 17

1. General 2. Addresses 3. Remarks 4. Extended Info 5. Pledges 6. Seat Reservations 7. Properties



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# Dealing with Yahrzeit complexities



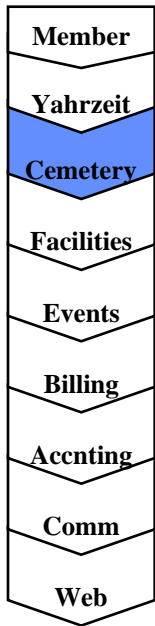
- Enquire online by deceased or by mourner
- Print reports
  - By mourner or family
  - By deceased
  - By date (print weekly yahrzeit lists)
  - By yahrzeit board position (to update yahrzeit boards)
- Seamlessly deal with either secular or Hebrew dates
- Hide the complexity of calculating yahrzeit dates for special cases
- Customize yahrzeit notices





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# Cemetery management is fully integrated



- Keep track of cemetery plots
  - occupied
  - reserved
  - available
- Enter information for multiple sections in multiple cemeteries
- Set up billings for maintenance
  - Annual plantings
  - Perpetual care



# A sample cemetery report request and output



- Member
- Yahrzeit
- Cemetery**
- Facilities
- Events
- Billing
- Accounting
- Comm
- Web

**Grave Listing (Local Copy)** < (U) Prin... - □ ×

File Report Actions Print User Reports Other Update Window Help

Preview Print Queue ... Options Printer For: Cemeteries

Option Set ID: \_\_\_\_\_ Description: \_\_\_\_\_  Change only by ...

Report Comment: \_\_\_\_\_

Totals Only  Show Options  Email Options

Cemetery: BATHURSTLAWN

to ... PARDES SHALOM

Sequence:  by Name  by Section | Subsection  Show usual coordinate labels from cemetery as column headers  Show usual coordinate labels on each line

Show ...  Occupied  Reserved  Available

**Grave Listing for: [Cemeteries - by ID]**

Page: 1 (Page Done) Previous Next Last Goto Print Exit

Grave Listing for: [Cemeteries - by ID] Mar 12/04 10:20 am Page 1

BATHURSTLAWN		Bathurst Lawn Cemetery						
Name	Death Date	Status	Section	Subsection	Row	Column	Plot	
Balin, Miriam	10 Tishrei 5702	Occupied	ADATH ISRAEL	1	1	2	3	
Dershowitz, Golda	3 Cheshvan 5732	Occupied	BETH SHALOM	1	2	1	1	
Dershowitz, Isaac	19 Tevet 5749	Occupied	BETH SHALOM	1	10	1	2	
Lazarus, John	Apr 15/1968	Occupied	BETH SHALOM	1	4	1	1	
Mertzetsky, Fredreich	Feb 11/1999	Occupied	ADATH ISRAEL	2	3	4	2	



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# MOSES' Facilities module manages reservations



- Reserve rooms for congregational or private events
- Specify equipment needed for each event
- Easily find available rooms and dates



# A sample facilities screen



- Member
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- Facilities**
- Events
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**Rooms - by ID**

File Actions Print User Reports Other Update Window Help

ID  5

Name

**1. Future Events**

Date	Time	ID	Name	Location Text
Sat Aug 21/04	09:00 am	BMGREENBERG	Josh Greenberg Bar Mitzvah	Main Sanctuary
Sat Aug 28/04	09:00 am	BMGOLD	Steven Gold Bar Mitzvah	Main Sanctuary
Sat Sep 4/04	09:00 am	BMROTH	Jeremy Roth Bar Mitzvah	Main Sanctuary
Sat Sep 11/04	09:00 am	BMHABER	Jennifer Haber Bat Mitzvah	Main Sanctuary

1. Future Events 2. Past Events 3. All Events 4. Configurations



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# Manage your congregational events



- Track costs versus budgets
- Manage ticket sales
- Generate and modify seating plans by table and by name



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# Notify members of all events



- Provide event information on congregational web site
- Look up events by date, type or keyword



# The event menu



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# MOSES supports flexible member billing options



- Bill for annual milestones
  - Dues (or ‘member contributions’)
  - Building fund installments
  
- Bill for one-time charges
  - Kiddush sponsorships
  - Donations
  
- Enable you to handle multiple dues levels
  
- Issue tax receipts either annually or on an immediate basis



# Charge type definition screen



- Member
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- Accting
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- Web

**Charge Types - by Description**

File Actions Print User Reports Other Update Window Help

Description

Usual Charge   Yearly

Last Year   Voluntary

Tax Deductible  %  Pledge

G/L Accounts

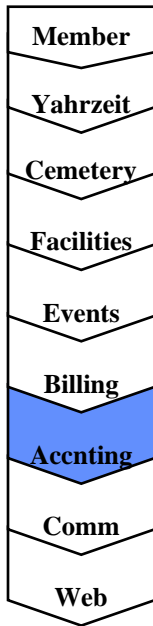
Charge Debit	<input style="width: 60px;" type="text" value="1030"/>	A/R: Miscellaneous	
Charge Credit	<input style="width: 60px;" type="text" value="3540"/>	Miscellaneous Sales	
Cost Debit	<input style="width: 60px;" type="text" value="1000"/>	Cash On Hand	
Cost Credit	<input style="width: 60px;" type="text" value="1030"/>	A/R: Miscellaneous	

*Edit Charge Type*



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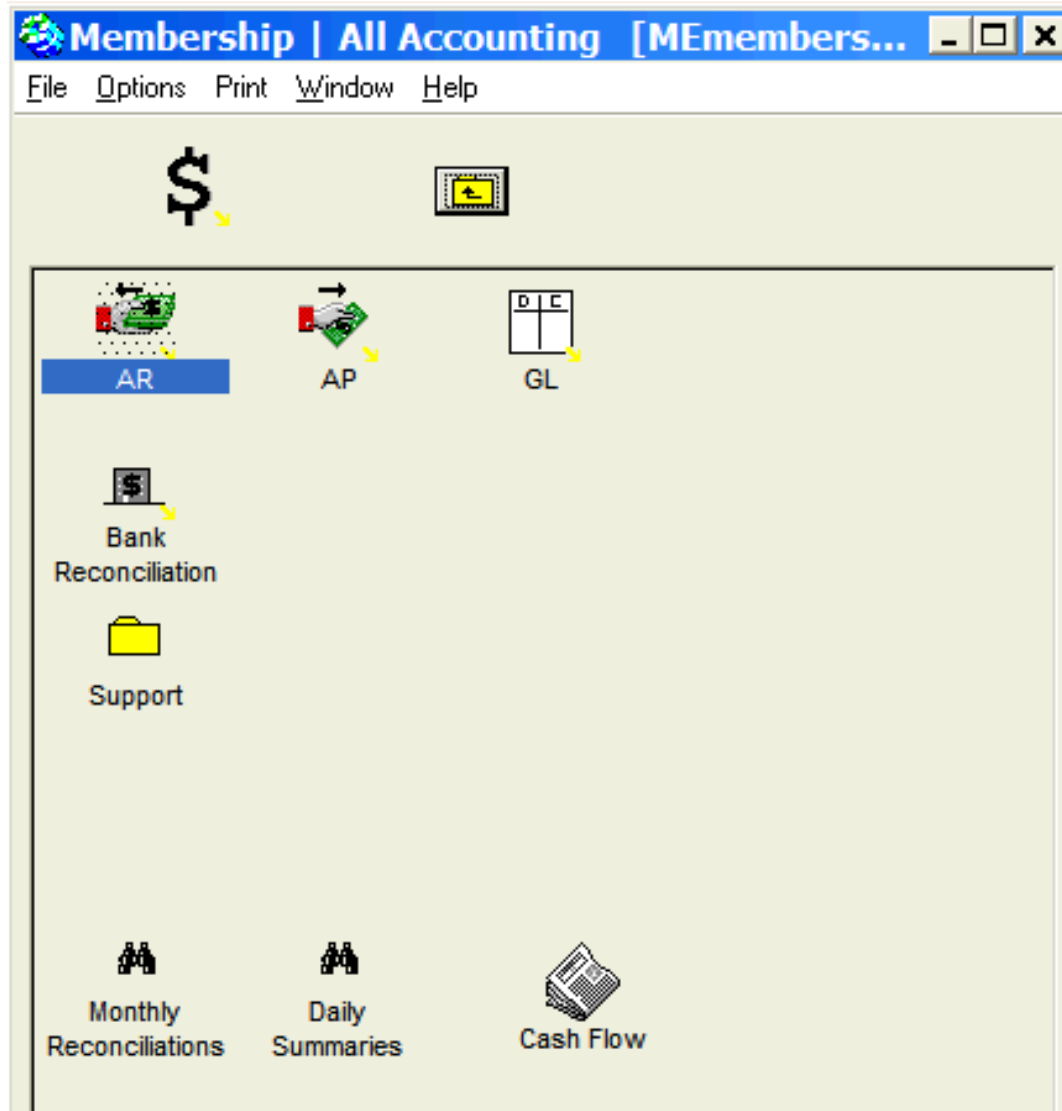
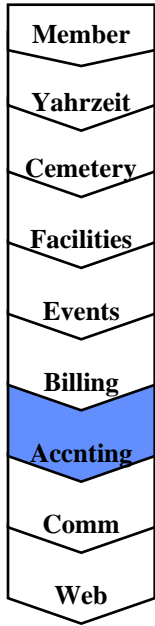
# MOSES includes integrated accounting modules to promote accuracy and efficiency



- Provide a full suite of accounting modules
  - Accounts Receivable
  - Accounts Payable
  - General Ledger
  - Bank Reconciliation
  
- Integrate fully with other modules
  
- Use the same ‘look and feel’ as other modules
  - Improves efficiency
  - Reduces training time
  - Enables job sharing



# The accounting menu



# A sample invoice screen



- Member
- Yahrzeit
- Cemetery
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- Web

**All AR Invoices - by Invoice # (Reference)**

File Actions Print User Reports Other Update Window Help

Customer: USDS  
 in Matter: M [in Customer: USDS]  
 Invoice #: 5    Mon Feb 23/2004    Gross: 1,000.00    To Pay: 0.00    CDN

**1. Main**

Order #

Net	1,000.00	Discount Offered		Expiry Date	
Gross	1,000.00	Discount Reduced	0.00	Due Date	Wed Mar 24/2004
		Discount Taken	0.00	Days Until Due	12
		Discount Available	0.00		

	Total	Posted	In Process
Payments	1,000.00	1,000.00	0.00
Credit Notes	0.00	0.00	0.00
Discount Taken	0.00	0.00	0.00
Adjustments	0.00	0.00	0.00
<b>Total</b>	<b>1,000.00</b>	<b>1,000.00</b>	<b>0.00</b>
Still To Pay	0.00		

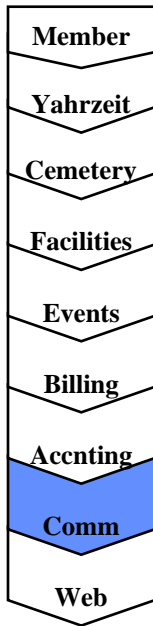
Comment: \_\_\_\_\_    Batch Enquiry: 2 BC2

1. Main    2. Credits Applied    3. Credits In Process    4. GL Allocation    5. Commissions    6. Expected Payments



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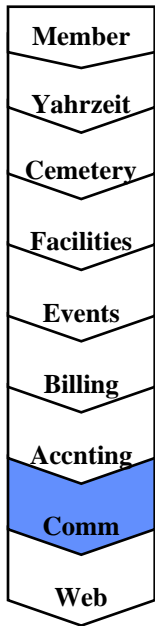
# MOSES provides effective and efficient communication mechanisms to keep your congregation informed



- Send out ‘mailings’ by multiple means (e-mail, fax, mail) with all communications fully logged
- Use powerful tools to select subsets of the membership to target based on the way you segment your membership (e.g. using membership demographics)



# Web broadcast e-mail example



**:: Send page from 'CHAT Alumni'**

**Link:**

**To:**

**Groups:**

**Respect Broadcast Flag:**  Follow user's wishes

**Bcc:**

**Your email address:** e.bensimon@utoronto.ca

**Subject:**

**Message:**

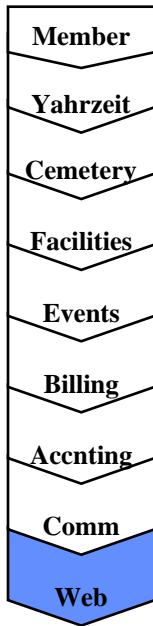
**What to Send:**

- HTML page with the message as an attachment
- Text page with the HTML page as an attachment
- Link to page
- Just the text message (no link)



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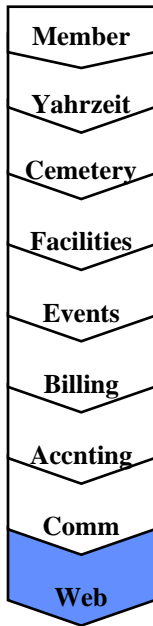
# MOSES has a Web Site Integration option which links you to your constituency



- Manage an on-line Membership Directory
  - Fully security controlled
  - Tightly linked to the back end database
  
- Enable members to
  - Update their records
  - Check their account status
  - Make payments
  - Make donations
  
- Enable non-technical people to update Web Site content through a dynamic Web Site management environment



# Sample edit profile on the web



## CHAT Alumni - Modify Details For: Shiff, Danny

In the form below, change or add information as appropriate in the various spaces provided.

We would appreciate you filling out as much as possible. Note that if you are concerned about privacy of information, you may choose to enter but not to publish some of the information, if you don't want other CHATniks to see it (recall that the directory is restricted to CHATniks).

You should find that it's fairly straightforward to use the form: simply fill in the information and then click 'Submit' at the bottom.

For some of the information (such as children and education), please view the more detailed help. [Help](#)(\*)

Mostly, updating your Alumni record is as easy as 1 - 2 - 3:

1. Fill in the blanks.
2. Click 'Submit' at the bottom
3. Check to confirm your changes were accepted

### Identification

<b>Surname</b>	<input type="text" value="Shiff"/>	<b>First Name</b>	<input type="text" value="Danny"/>
<b>Subscriber</b>	<input type="text" value="Shiff, Danny (dshiff)"/>	<b>Deceased</b>	<input type="checkbox"/>
<b>Class Of</b>	<input type="text" value="1978"/>	<b>Grad Year</b>	<input type="text" value="1978"/>
<b>CHAT Campus</b>	<input type="text" value="Community Hebrew Academy Of Toronto - Neptune Campus"/>		
<b>Title</b>	<input type="text" value="Mr."/>	<b>Maiden Name</b>	<input type="text"/>
<b>Middle Name</b>	<input type="text"/>	<b>Nickname</b>	<input type="text"/>
<b>Birth Date</b>	<input type="text" value="Jan 26/1960"/>		

