



User & Administrator Manual

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This manual is intended for use by club and association administrators and members of clubs and associations that are currently signed up to use the ClubExpress service, to help them maximize their use of and benefit from the ClubExpress platform. It is also intended for use by club and association officers who are evaluating the platform as a potential solution for their membership, website and communications needs.

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TABLE OF CONTENTS

Chapter 1 – Introduction.....	12
Chapter 2 – Understanding the ClubExpress Model.....	13
Chapter 3 – Screen Orientation.....	20
Chapter 4 – Creating Your Account	25
Chapter 5 – Club Setup Check List	30
Chapter 6 – ClubExpress Users.....	37
Chapter 7 – Logging In	42
Chapter 8 – Member Profile	44
Chapter 9 – Control Panels & Standard Dialogs	89
Chapter 10 – Control Panel – Membership	100
Chapter 11 – Control Panel – Club Information.....	159
Chapter 12 – Control Panel – Website.....	183
Chapter 13 – Control Panel – Finances	225
Chapter 14 – Control Panel – Data Export and Reports.....	246
Chapter 15 – Admin Features Without a User Interface	255
Chapter 16 – Content Editor	258
Chapter 17 – Home Page Designer	280
Chapter 18 – Modules – Overview	283
Chapter 19 – Modules – Benefits	287
Chapter 20 – Modules – Interests	290
Chapter 21 – Modules – Committees.....	298
Chapter 22 – Modules – News	304
Chapter 23 – Modules – Documents.....	308
Chapter 24 – Modules – Events Calendar & Registration.....	318
Chapter 25 – Modules – Contact Us	385
Chapter 26 – Modules – Member Signup / Renewal	387
Chapter 27 – Modules – Membership Directory	404
Chapter 28 – Modules – Discussion Forums.....	407
Chapter 29 – Modules – Chapter Finder	440
Chapter 30 – Modules – Photo Pages.....	442
Chapter 31 – Modules – FAQ.....	446
Chapter 32 – Modules – Donations.....	453
Chapter 33 – Modules – Surveys	459
Chapter 34 – Modules – Storefront	478
Chapter 35 – Modules – Blogs	515
Appendix A – Bulk Load Specifications	525
Appendix B – Understanding QuickBooks Exports.....	531
Appendix C – System Emails	538
Appendix D – Settings for your own Merchant Account.....	542

TABLE OF FIGURES

Figure 2.1 – The ClubExpress Platform	13
Figure 2.2 – ClubExpress.com	14
Figure 2.3 – Signing Up	14
Figure 2.4 – Initial Website.....	15
Figure 2.5 – Non-member Content.....	15
Figure 2.6 – Member Signup.....	16
Figure 2.7 – Login	16
Figure 2.8 – Member Access Level.....	17
Figure 2.9 – Renewals	18
Figure 2.10 – Funds Handling	18
Figure 3.1 – ClubExpress screen	20
Figure 3.2 – Add me to your Mailing List.....	24
Figure 4.1 – Club Registration Step 1 – Basic Club Information.....	26
Figure 4.2 – Club Registration Step 2 – Administrator Contact Information.....	28
Figure 4.3 – Club Registration Step 3 – Subscription Agreement.....	29
Figure 5.1 – Club Setup Check List.....	30
Figure 7.1 – Login Page.....	42
Figure 7.2 – Retrieving a Lost Username and Password.....	43
Figure 8.1 – Member Profile.....	45
Figure 8.1a – Member Profile with Automated Renewal and Payment.....	45
Figure 8.2 – Renewal.....	48
Figure 8.3 – Pending Payments	49
Figure 8.4 – Contact Information.....	51
Figure 8.5 – Additional Member Data.....	52
Figure 8.6a – Membership Directory (top part).....	53
Figure 8.6b – Membership Directory (bottom part).....	56
Figure 8.7 – Joining Chapter(s).....	58
Figure 8.8 – Add Chapter.....	58
Figure 8.9 – Secondary and/or Tertiary Members	59
Figure 8.10 – Add Secondary and/or Tertiary Member – Simple Version	60
Figure 8.11 – Add Secondary and/or Tertiary Member – Full Version	60
Figure 8.12 – Add Chapter(s) and Secondary/Tertiary Members	61
Figure 8.13 – User Name and Password	62
Figure 8.14 – Interests	63
Figure 8.15a – Forum General Preferences (top part).....	64
Figure 8.15b – Forum General Preferences (bottom part).....	67
Figure 8.16 – Forum Memberships	69
Figure 8.17 – My Preferences for a Forum.....	70
Figure 8.18 – Member Photo Pages.....	71
Figure 8.19 – Add/Edit Photo Page.....	72
Figure 8.20 – Edit Photo Page Content.....	73
Figure 8.21 – Select Photos	74
Figure 8.22 – Add Multiple Photos	75
Figure 8.23 – Add Photo	76
Figure 8.24 – Transaction History	78
Figure 8.25 – Transaction History showing expanded details.....	78
Figure 8.26 – Payment History.....	80

Figure 8.27 – Edit Payment.....	81
Figure 8.28 – Edit Credit	82
Figure 8.29 – Credit Card Information	83
Figure 8.30 – Event History.....	85
Figure 8.31 – Optional Additional Charges.....	86
Figure 8.32 – Bad Email Notification	87
Figure 8.33 – Handling bad email address(es).....	87
Figure 9.1 – Control Panel	89
Figure 9.2 – Coordinator Control Panel.....	94
Figure 9.3 – Control Panel for Subgroup Administrators	95
Figure 9.4 – Display Sequencer	97
Figure 9.5 – Member Selector.....	98
Figure 9.6 – Specifying Coordinator Access Rights.....	99
Figure 10.1 – Member Manager	100
Figure 10.2 – Primary / Secondary Changes.....	105
Figure 10.3 – Member Address Popup.....	106
Figure 10.4 – Member Manager Status dialog	107
Figure 10.5 – Viewing Secondary & Tertiary Members	110
Figure 10.6 – Member Notes screen.....	110
Figure 10.7 – Member Charge/Credit Screen.....	111
Figure 10.8 – Pending Payments	112
Figure 10.9 – Member Types	115
Figure 10.10a – Add/Edit Member Type (top part)	116
Figure 10.10b – Add/Edit Member Type (bottom part)	122
Figure 10.11 – Renewal/Expiration Options	125
Figure 10.12a – Membership Options (top part).....	128
Figure 10.12b – Membership Options (middle part)	131
Figure 10.12c – Membership Options (bottom part)	133
Figure 10.13 – Membership Wizards Setup	136
Figure 10.14 – Additional Member Data.....	137
Figure 10.15 – Add/Edit Question	138
Figure 10.16 – Define Member Types for a Question.....	141
Figure 10.17 – Additional Charges.....	142
Figure 10.18 – Add/Edit an Additional Charge	143
Figure 10.19 – Joining Agreement	145
Figure 10.20 – Emailings	146
Figure 10.21 – New Emailing	148
Figure 10.22 – Non-Member Database Manager	151
Figure 10.23 – Non-Member Database Categories	152
Figure 10.24 – Add/Edit Non-Member Database Category	152
Figure 10.25 – Add/Edit Non-Member Database Entry	154
Figure 10.26 – Importing a Non-Member Database	155
Figure 10.27 – Non-Member Database Maintain Options.....	156
Figure 10.28 – Converting a non-member to a member.....	157
Figure 10.29 – Merge Non-Member	158
Figure 11.1a – Names, Description and Addresses	159
Figure 11.1b – One More Address, Phone, Fax, Email and Legal Info.....	160
Figure 11.2 – Administrators and Coordinators	162
Figure 11.3 – Add Coordinator	163
Figure 11.4 – Function → Coordinator view	164
Figure 11.5 – Metro Area Administration.....	166

Figure 11.6 – Add/Edit Metro Area.....	166
Figure 11.7 – Agreement	167
Figure 11.8 – Chapters, Districts and Regions	168
Figure 11.9 – Configuring Chapters, etc.....	169
Figure 11.10a – Configure Chapter Finder	170
Figure 11.10b – Configure Chapter Finder – Custom Map	171
Figure 11.11 – Adding a Subgroup	174
Figure 11.12 – Specifying an Image Map ID	175
Figure 11.13 – Subgroup Administrators.....	176
Figure 11.14 – Defining Subgroup-specific Member Fees.....	177
Figure 11.15 – Titles	178
Figure 11.16 – Add/Edit Title.....	179
Figure 11.17 – Contacts.....	180
Figure 11.18 – Contact Add/Edit	180
Figure 11.19 – Club Options	182
Figure 12.1 – Template and Theme	184
Figure 12.2 – Common Content Administration.....	185
Figure 12.3 – Edit Page Header.....	186
Figure 12.4 – Menu Configuration.....	189
Figure 12.5 – Build Menu	190
Figure 12.6 – Add/Edit External Menu Link	192
Figure 12.7 – Built-in Module Index.....	193
Figure 12.8 – Module Configuration	194
Figure 12.9 – Module Coordinators.....	195
Figure 12.10 – Custom Web Pages Manager	196
Figure 12.11 – Custom Page Category Administration.....	197
Figure 12.12 – Add Custom Page	197
Figure 12.13 – Photo Manager.....	199
Figure 12.14 – Edit Photo Configuration	200
Figure 12.15 – Tag Master List	201
Figure 12.16 – Tag Analyzer	202
Figure 12.17 – Add Multiple Photos	203
Figure 12.18 – Add One Photo.....	204
Figure 12.19 – Photo Page Manager	206
Figure 12.20 – Photo Page Options	207
Figure 12.21 – Photo Page Categories	208
Figure 12.22 – Add/Edit Photo Page.....	209
Figure 12.23 – Edit Photo Page Content.....	211
Figure 12.24 – Select Photo(s).....	212
Figure 12.25 – Domain Names	215
Figure 12.26 – Edit Domain Name	216
Figure 12.27 – Build a Link	216
Figure 12.28 – Add/Edit Quick Link.....	218
Figure 12.29 – Email Account Administration.....	219
Figure 12.30 – Add/Edit Email Account.....	219
Figure 12.31 – Web Graphics Administration	221
Figure 12.32 – Add Web Graphic.....	222
Figure 12.33 – Website Options.....	223
Figure 13.1 – Pending Payments	225
Figure 13.2 – Make Payment	226
Figure 13.3 – Open Credits	227

Figure 13.4 – Add Credit	228
Figure 13.5 – Edit Credit	228
Figure 13.6 – Bank Account Administration.....	229
Figure 13.7 – Bank Information	231
Figure 13.8 – Finding bank and account information on a check.....	232
Figure 13.9 – Verify test transaction amount.....	232
Figure 13.10 – Bank Account Activity.....	233
Figure 13.11 – Financial Account Administration	235
Figure 13.12 – Add/Edit Financial Account	236
Figure 13.13 – Edit System Financial Account.....	237
Figure 13.14 – QuickBooks Export Administration	238
Figure 13.15 – New QuickBooks Export.....	239
Figure 13.16 – ClubExpress Rates	240
Figure 13.17 – Finance Options	242
Figure 14.1 – Data Export	246
Figure 14.2 – Select Date Range panel	247
Figure 14.3 – All Reports	248
Figure 14.4 – Member Contact Lists	249
Figure 14.5 – Subgroup Options	249
Figure 14.6 – Member Options.....	250
Figure 14.7 – Date Range Filters	251
Figure 14.8 – Output Options	252
Figure 14.9 – Report Logo	253
Figure 16.1 – The Content Editor screen	259
Figure 16.2 – Document Inspector	264
Figure 16.3 – Using a GroupBox Control	266
Figure 16.4 – Entering a table and specifying table options	267
Figure 16.5 – Right-clicking on a table	267
Figure 16.6 – Table Properties.....	268
Figure 16.7 – Right-clicking in a table	269
Figure 16.8 – Cell Properties	271
Figure 16.9 – Build a Link	272
Figure 16.10 – Insert Photo.....	274
Figure 16.11 – Insert Image	275
Figure 16.12 – Set Image Properties.....	276
Figure 16.13 – Insert Audio, Video, Flash	277
Figure 16.14 – Spell Check Dialog.....	279
Figure 17.1 – Home Page for an administrator logged in.	280
Figure 17.2 – Home Page Designer in Edit mode.	280
Figure 17.3 – Add Row – Row Layout.....	281
Figure 17.4 – Home page with multiple sections	281
Figure 18.1 – Module Configuration	284
Figure 19.1 – Benefits Module	287
Figure 19.2 – Benefits Administration.....	288
Figure 19.3 – Add/Edit Benefits.....	289
Figure 20.1 – Interests	291
Figure 20.2 – Interest Members	291
Figure 20.3 – Interest Category Administration	292
Figure 20.4 – Add/Edit Interest Category	293
Figure 20.5 – Interests within a Category.....	294
Figure 20.6 – Add/Edit Interests.....	295

Figure 20.7 – Interest Members	296
Figure 20.8 – Member Profile – Interests	297
Figure 21.1 – Committees	298
Figure 21.2 – Committee Members	299
Figure 21.3 – Committees Administration	300
Figure 21.4 – Add/Edit Committee	301
Figure 21.5 – Committee Members	302
Figure 21.6 – Add/Edit Member	303
Figure 22.1 – News main screen.....	304
Figure 22.2 – News item screen.....	304
Figure 22.3 – News Administration	305
Figure 22.4 – Add/Edit News Item.....	306
Figure 23.1 – Document Folders.....	308
Figure 23.2a – Documents within a folder	309
Figure 23.2b – Viewing document details.....	309
Figure 23.2c – Viewing file readers and utilities	309
Figure 23.3a – Upload documents option.....	310
Figure 23.3b – Upload document dialog.....	310
Figure 23.4 – Rating documents	311
Figure 23.5 – Commenting on documents.....	311
Figure 23.6 – Add a document comment	311
Figure 23.7 – Document Folders Administration	313
Figure 23.8 – Add/Edit Document Folder	314
Figure 23.9 – Documents within a folder	315
Figure 23.10a – Add/Edit Documents.....	316
Figure 23.10b – Update document.....	317
Figure 24.1 – Events – Month Grid View.....	319
Figure 24.2 – View panel in Grid View	320
Figure 24.3 – View panel in List View.....	320
Figure 24.4 – Search / Filter panel for events.....	321
Figure 24.5 – Events – Event View	322
Figure 24.6 – Events – Event Activities	324
Figure 24.7a – Event Registration Wizard – Non-Member	325
Figure 24.7b – Event Registration Wizard – Searching for a non-member	326
Figure 24.7c – Event Registration Wizard – Member	326
Figure 24.7d – Event Registration Wizard – Administrator	327
Figure 24.8a – Event Registration Wizard – Entering Companions	328
Figure 24.8b – Two versions of the Add Companion/Guest Dialog	329
Figure 24.9 – Event Registration Wizard – Adding Additional Members.....	329
Figure 24.10 – Event Registration Wizard – Summary.....	330
Figure 24.11 – Event Registration Wizard – Event-Specific Questions.....	331
Figure 24.12 – Event Registration Wizard – Event Activities	332
Figure 24.13 – Pending Payments	333
Figure 24.14 – Event Administration	335
Figure 24.15 – Event Categories.....	337
Figure 24.16 – Add/Edit Event Category	337
Figure 24.17 – Selecting a Color.....	338
Figure 24.18 – Registrant Types	339
Figure 24.19 – Add Registrant Type	340
Figure 24.20 – Event Questions.....	342
Figure 24.21 – Add/Edit Question	343

Figure 24.22 - Locations345

Figure 24.23 – Add/Edit Location345

Figure 24.24a – Event Defaults (top part)346

Figure 24.24b – Event Defaults (bottom part).....347

Figure 24.25a – New Event Wizard – Step 1: Basic Event Info - top349

Figure 24.25b – New Event Wizard – Step 1: Basic Event Info - middle.....351

Figure 24.25c – New Event Wizard – Step 1: Basic Event Info - bottom352

Figure 24.25d – Partial Payments for an Event353

Figure 24.26 – Payment Schedule for an Event354

Figure 24.25e – Are Cancellations Allowed?354

Figure 24.25f – Non-Member / Companion Settings356

Figure 24.27a – New Event Wizard – Step 2: More Info – top357

Figure 24.27b – New Event Wizard – Step 2: More Info – bottom359

Figure 24.28 – Defining Activities/Items for a multi-activity event362

Figure 24.29a – New Activity - top363

Figure 24.29b – New Activity - bottom.....364

Figure 24.30 – New Item.....366

Figure 24.31 – Event Details – Administrator Ribbon367

Figure 24.32 – Event Description screen368

Figure 24.33 – Event Registrations369

Figure 24.34 – View Registration Details370

Figure 24.35a – Attendees – Initial Version.....371

Figure 24.35b – Pre-registered Attendees371

Figure 24.35c – Not-yet-registered members, no companions372

Figure 24.36 – Defining event-specific questions373

Figure 24.37 – Event Emailing375

Figure 24.38 – Event Notes376

Figure 24.39 – Event Exports.....376

Figure 24.40 – Copy event dialog377

Figure 24.41 – Copy multiple events on a daily frequency378

Figure 24.42 – Copy multiple events on a weekly frequency.....379

Figure 24.43 – Copy multiple events on a monthly frequency380

Figure 24.44 – Copy multiple events on a yearly frequency381

Figure 24.45 – Archive / Delete events382

Figure 24.46 – New Notification383

Figure 25.1 – Contact Us385

Figure 26.1 – Member Signup/Renewal – Member Type389

Figure 26.2a – Member Signup/Renewal – Basic Contact Info – Personal ver.390

Figure 26.2b – Member Signup/Renewal – Basic Contact Info – Business ver.391

Figure 26.3 – Member Signup/Renewal – Additional Member Data392

Figure 26.4 – Member Signup/Renewal – Member Interests.....393

Figure 26.5 – Member Signup/Renewal – Defining sec./tert. members394

Figure 26.6 – Sample brief data entry screen for secondary/tertiary members.395

Figure 26.7 – Longer data entry screen for secondary/tertiary members.....395

Figure 26.8 – Defining chapter assignments and secondary/tertiary members.396

Figure 26.9 – Member Signup/Renewal – User ID and Password.....397

Figure 26.10 – Member Signup/Renewal – Additional Charges398

Figure 26.11 – Membership Signup/Renewal – Joining Agreement399

Figure 26.12 – Member Signup/Renewal – Summary400

Figure 26.13 – Membership Signup/Renewal – Pending Payments401

Figure 26.14 – Payment by credit card.....402

Figure 26.15 – Payment by check.....	403
Figure 27.1 – Member Directory List	404
Figure 27.2 – Member Directory Detail.....	405
Figure 28.1 – Forum categories and forums.....	408
Figure 28.2 – Forum threads.....	409
Figure 28.3 – Post Message – basic editor	410
Figure 28.4 – Message if member or forum is Moderated	410
Figure 28.5 – Adding an attachment to a message	411
Figure 28.6 – Adding multiple attachments to a message	411
Figure 28.7 – Thread: Thread View.....	412
Figure 28.8 – Thread: Flat View	413
Figure 28.9 – Replying to a message.....	414
Figure 28.10 – Forum Search	417
Figure 28.11 – Forum Search Results.....	417
Figure 28.12 – Forums Manager.....	418
Figure 28.13 – Forums Category Administration	419
Figure 28.14 – Add/Edit Category	419
Figure 28.15 – Forums Category Sequence.....	420
Figure 28.16 – Forums Policy	421
Figure 28.17a – Forum Defaults (top part)	422
Figure 28.17b – Forum Defaults (bottom part)	423
Figure 28.18a – Add/Edit Forum – top part	425
Figure 28.18b – Add/Edit Forum – bottom part	429
Figure 28.19 – Forums Member Manager.....	432
Figure 28.20 – Forum Member Information.....	433
Figure 28.21 – All Forums Member Manager.....	434
Figure 28.22 – Edit All Forums Status.....	435
Figure 28.23 – Thread Administration	435
Figure 28.24 – Message Administration	436
Figure 28.25 – Editing files attached to a message	437
Figure 28.26 – Forum Moderator Notification	438
Figure 28.27 – Forum Message Approval	438
Figure 28.28 – Moderator view of messages in a forum.....	439
Figure 29.1 – Chapter Finder	440
Figure 29.2 – Viewing details for a chapter	441
Figure 30.1 – Photo Page List.....	442
Figure 30.2 – A Typical Photo Page.....	443
Figure 30.3 – Viewing a Photo	444
Figure 31.1 – FAQ Category screen.....	446
Figure 31.2 – FAQ Questions screen.....	447
Figure 31.3 – FAQ Answer.....	447
Figure 31.4 – FAQ Questions and Answers on the same screen	448
Figure 31.5 – FAQ Categories Administration	449
Figure 31.6 – Add/Edit FAQ Category.....	450
Figure 31.7 – Questions within an FAQ category	451
Figure 31.8 – Add/Edit Questions	452
Figure 32.1 – Donations screen	453
Figure 32.2 – Making a Donation into a fund.....	454
Figure 32.3 – Donations Administration	455
Figure 32.4 – Add/Edit Fund	456
Figure 32.5 – Donations for a Fund.....	458

Figure 33.1 – Surveys screen	459
Figure 33.2 – Surveys Administration.....	460
Figure 33.3 – Survey Categories.....	462
Figure 33.4 – Add Survey	463
Figure 33.5 – Survey Pages/Questions.....	466
Figure 33.6 – Add Page	467
Figure 33.7 – Add Question	468
Figure 33.8 – Survey Question – Detail answers	469
Figure 33.9 – Survey Question – Summary answers	470
Figure 33.10 – Survey Question - Reports	470
Figure 33.11 – Sample Scale Questions	473
Figure 33.12 – Sample Scale Questions with a typo	473
Figure 33.13 – Adding Scale Questions	474
Figure 33.14 – Survey Results	476
Figure 33.15 – Survey Reports	477
Figure 34.1 – Storefront opening screen	480
Figure 34.2 – Storefront Categories	481
Figure 34.3 – Product Details.....	481
Figure 34.4 – Viewing the Shopping Cart.....	482
Figure 34.5 – Checkout for non-members.....	483
Figure 34.6 – Find your non-member record	484
Figure 34.7 – Checkout final screen.....	485
Figure 34.8 – Payment Screen.....	486
Figure 34.9 – Download Bank.....	487
Figure 34.10 – Storefront Manager – Products	488
Figure 34.11 – Product Categories	489
Figure 34.12 – Add/Edit Product Category.....	490
Figure 34.13 – Tax Rates.....	490
Figure 34.14 – Add/Edit Tax Rate	491
Figure 34.15 – Shipping Methods	492
Figure 34.16 – Add/Edit Shipping Method.....	492
Figure 34.17a – Storefront Options (top part).....	493
Figure 34.17b – Storefront Options (bottom part).....	495
Figure 34.18 – Add Product	497
Figure 34.18a – Edit Product – Photo panel.....	499
Figure 34.19 – Assigning a product to categories.....	501
Figure 34.20 – Product Inventory	502
Figure 34.21 – Add/Edit Inventory.....	503
Figure 34.22 – Add Digital Product	505
Figure 34.23 – Product Documents.....	506
Figure 34.24 – Add Document	507
Figure 34.25 – Storefront Manager – Orders.....	508
Figure 34.26 – Edit Order ShipTo	510
Figure 34.27 – Order Details	511
Figure 34.28 – Order Shipments.....	511
Figure 34.29 – Shipment Status.....	512
Figure 34.30 – Download Bank Manager.....	513
Figure 34.31 – Edit Download	514
Figure 35.1 – Blogs main screen.....	515
Figure 35.2 – Reading blog entries	516
Figure 35.3 – Adding a comment	517

Figure 35.4 – About this Blog	517
Figure 35.5 – More Posts.....	517
Figure 35.6 – Viewing All Posts.....	518
Figure 35.7 – Blog Author Tools.....	519
Figure 35.8 – Posts Manager	519
Figure 35.9 – Add Blog Post	520
Figure 35.10 – Post Comments.....	521
Figure 35.11 – Edit Blog Properties	522
Figure 35.12 – Blogs Manager	523
Figure 35.13 – Add Blog	523

Chapter 1 – Introduction

Welcome to ClubExpress, the most powerful tool on the Internet for managing hobby and enthusiast clubs, sports and leisure clubs, social clubs, homeowner and condo associations, fraternities and alumni clubs, community service clubs, and professional and trade associations of all kinds.

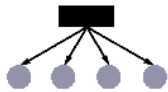
ClubExpress was designed to allow you to move the administration of your club or association entirely online. ClubExpress handles your membership database, signups and renewals, committees, documents, photos, videos, discussion forums, event calendar and registration, merchandise sales, surveys, and financial management using the Internet. And if your club or association has chapters, districts and regions, ClubExpress supports subgroup administrators, reports and functionality throughout the system.

Every club or association signing up for ClubExpress gets a public website with content for visitors promoting the organization and its activities. Members log in to see members-only content, including a complete membership directory and profile. Other functions such as discussion forums are also reserved for members-only. When administrators log in, they have access to additional screens and functions for managing the organization, including financial tracking, website configuration, event management, data export and other tasks.

In the coming months, we will be adding many more features based on the feedback we receive from our customers. So if there's a particular feature you need, just let us know; the more clubs and associations that request it, the quicker it moves up the priority list.

THIS MANUAL

This manual is a complete reference to ClubExpress, designed for club or association administrators. It includes everything that administrators need to configure their website and manage the organization. Some sections of the manual are also relevant for members and module coordinators, but there is a separate manual available for these users.



Some functionality within ClubExpress applies only to clubs that have chapters, districts or regions, subgroups within the main club or association. If your club does not have these subgroups, this functionality will be completely hidden. If functionality applies to subgroups, it is described with the icon to the left.



Within ClubExpress, every screen also includes a link to an online help system that includes all of the material in this manual.

And if anything is not clear, you are always welcome to call us toll-free at 1-866-HLP-CLUB (866-457-2582) and we will gladly explain what you need to know. Your ClubExpress subscription includes unlimited support.

Chapter 2 – Understanding the ClubExpress Model

INTRODUCTION

This chapter explains how ClubExpress uses the Internet to provide your club or association with its own website, member login and database, renewals, discussion forums and other features.

THE CLUBEXPRESS PLATFORM

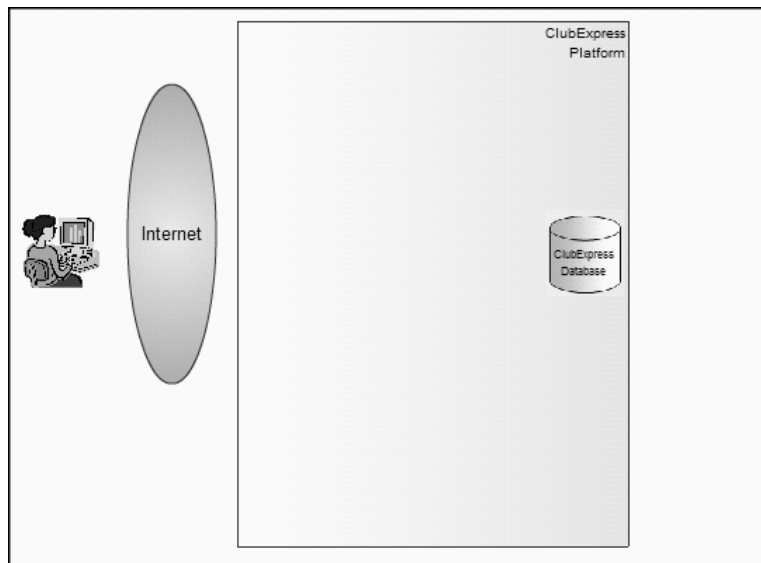


Figure 2.1 – The ClubExpress Platform

As shown in Figure 2.1, ClubExpress is software that runs on powerful computer servers in the data center provided by a commercial-grade Internet hosting company. This company provides multiple hi-speed connections to the Internet, to ensure redundant paths for your data and to provide optimal performance. They also provide and maintain firewalls to protect your data.

Within the platform is a sophisticated database that is used to store everything associated with your club or association, including member information, the content of your website, financial transactions and even the photos used on various pages.

Users access the platform, and the website for a club or association hosted on that platform by opening an Internet browser and surfing to the site.

CLUBEXPRESS.COM AND SIGNING UP

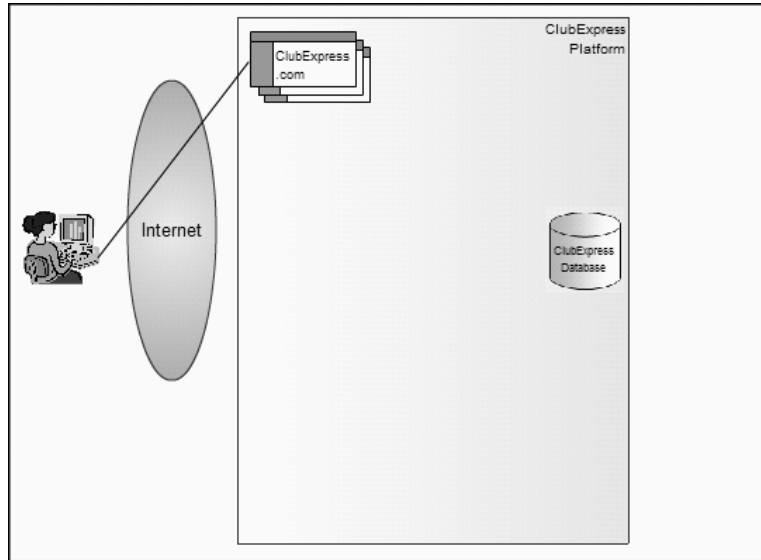


Figure 2.2 – ClubExpress.com

ClubExpress.com describes our product and service to prospective customers. It is also built using the ClubExpress platform.

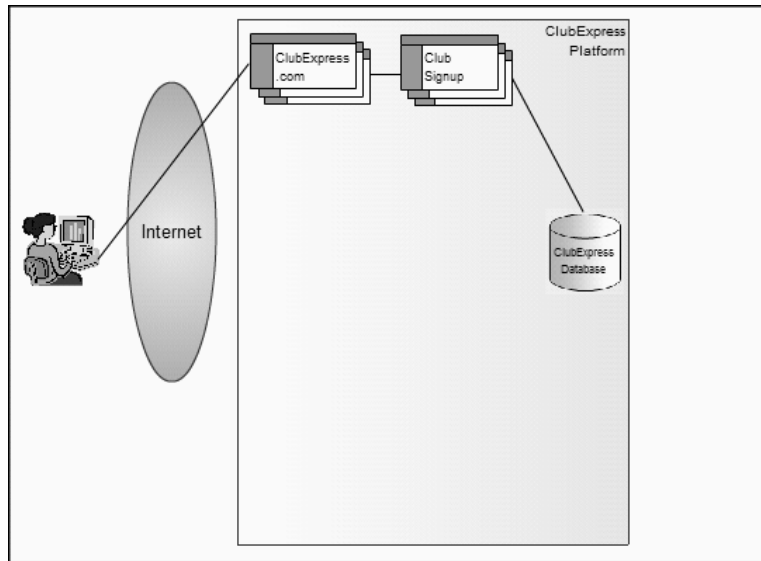


Figure 2.3 – Signing Up

When a club or association wants to sign up for ClubExpress, it does so entirely online, creating its own account that is then entered into the database. As described in chapters 4 and 5, an administrator steps through a short wizard to create the account and is then presented with a Check List of additional tasks that must be completed before the website and membership database can be turned on.

INITIAL WEBSITE

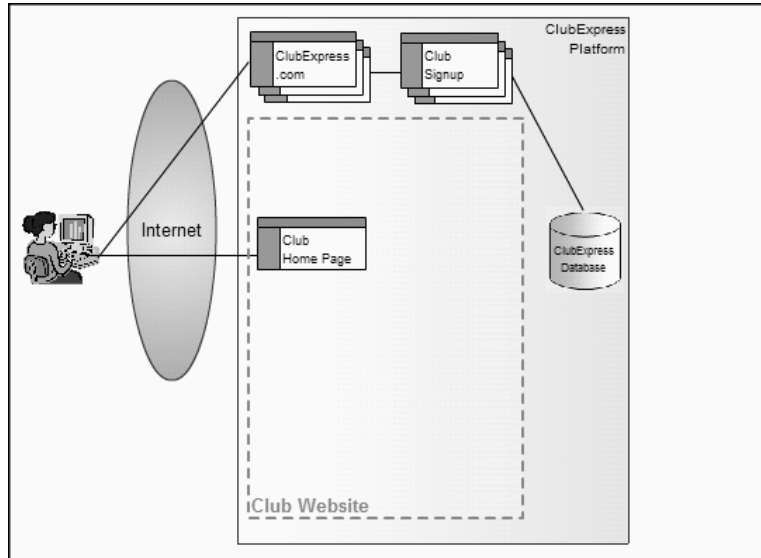


Figure 2.4 – Initial Website

Once a club or association is signed up, ClubExpress automatically creates an initial website in the platform, with a default home page that can be extensively customized.

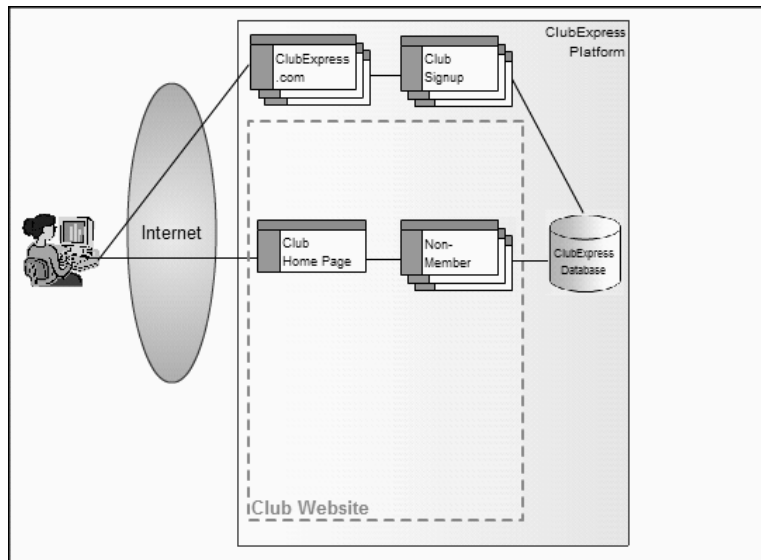


Figure 2.5 – Non-member Content

The public side of the website includes content that the club or association creates for non-members, including, for example, the benefits of signing up as a member, membership information, a list of member interests, a calendar of events, etc. This content can include any number of custom pages as part of your website.

MEMBER SIGNUP

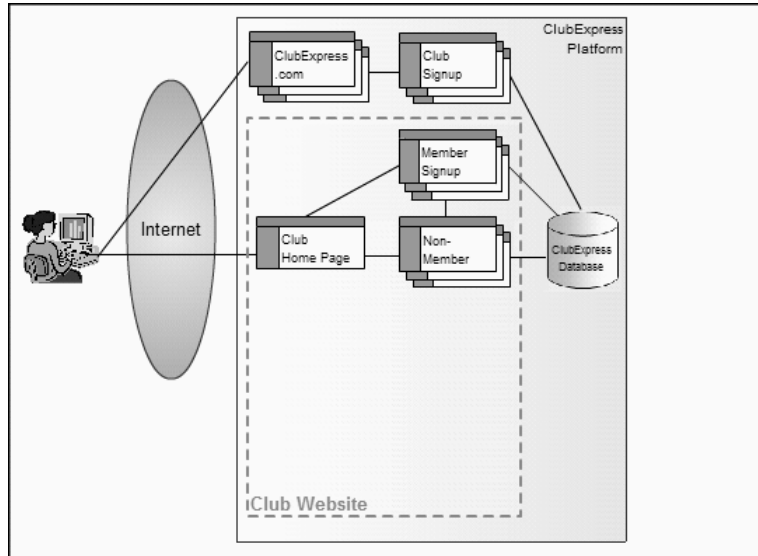


Figure 2.6 – Member Signup

One of the features in ClubExpress is a wizard that allows new members to sign up entirely online. Members provide their basic contact information, establish a user account and password, answer club-specific questions, select a membership type from options that you define, and pay for their membership by credit card or by printing an invoice and mailing a check. They are then entered in the membership database. You can also enable an option to require new members to be approved by the board before they are enabled.

LOGIN

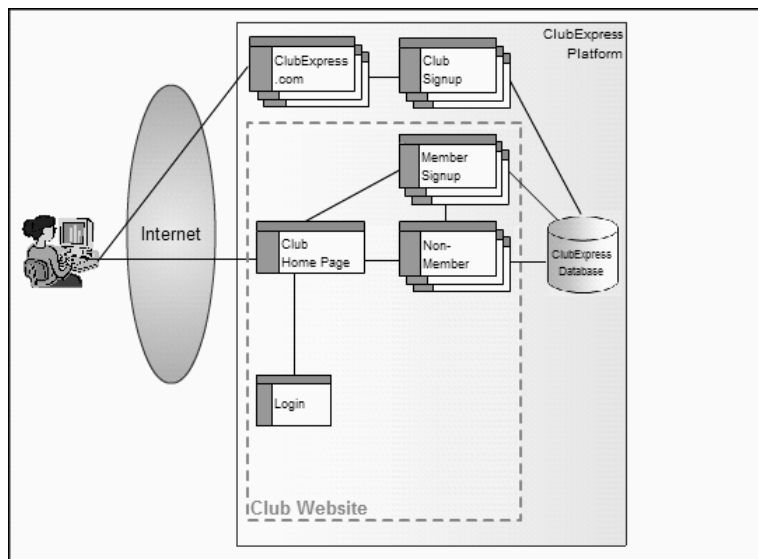


Figure 2.7 – Login

ClubExpress provides each member with his or her own login, including a user name and password. A “Forgot My Password” option allows members to retrieve a lost password.

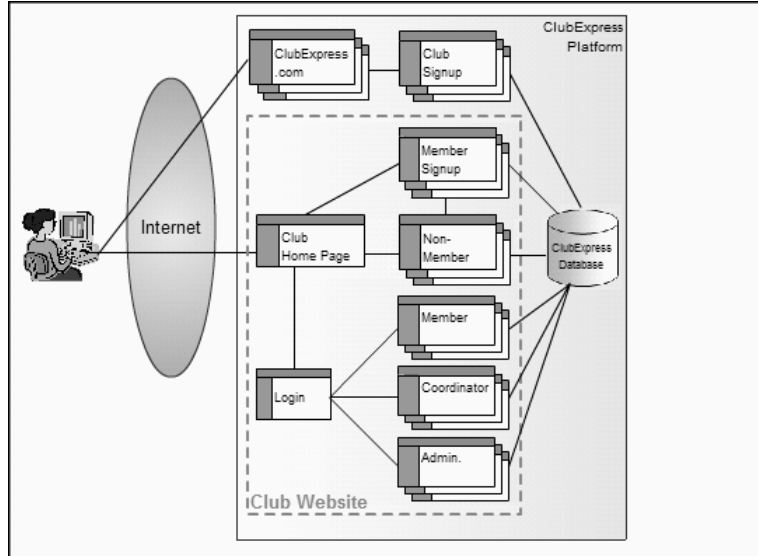


Figure 2.8 – Member Access Level

When members log in, the system automatically detects their access level. Ordinary members have access to members-only features and special content that you designate for members only. Members see a different menu than the public and you can even define different menus based on a member type.

ClubExpress includes more than sixteen purpose-built modules to handle many of the common activities that clubs and associations perform, including committee tracking, online discussion forums, documents, surveys/polls, member interests, blogs, event calendar and registration, etc. Each organization decides which modules to enable, how each module will be configured, who will have access to that module, and where the module will be placed on the visitor and member-only menus.

ClubExpress also allows clubs and associations to create any number of custom web pages, to control whether each page can be accessed by any site visitor or by members-only, and to access that page via a menu choice or an internal link from another page.

In addition, ClubExpress supports coordinators that you designate who have special administrative rights over a specific module or page, adding and updating content within that module or page only. Finally, the system recognizes a category of users called administrators who have complete control over the configuration of the site. For more information on the various user types, see Chapter 6.

RENEWALS

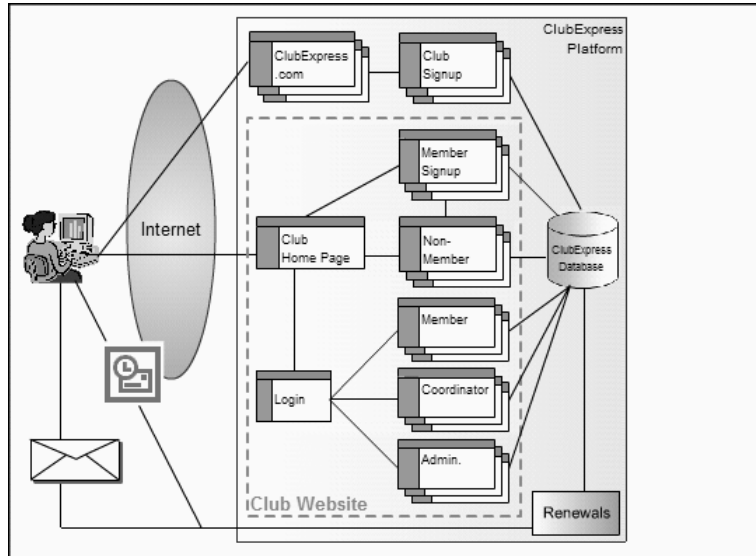


Figure 2.9 – Renewals

ClubExpress can handle membership renewals for you. You have control over the renewal schedule, when and how renewal notices are sent out (by email or regular mail) and when members are “expired” from the organization. ClubExpress can also handle fully automated renewals and payments.

FUNDS HANDLING

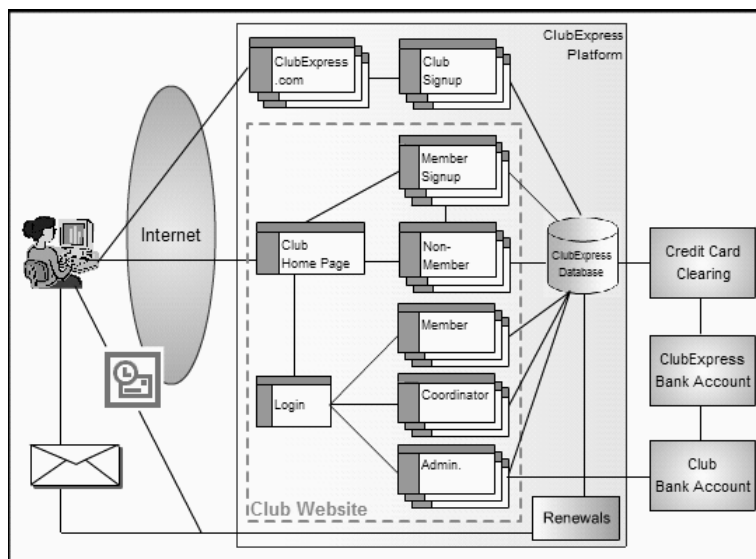


Figure 2.10 – Funds Handling

ClubExpress collects member signup and renewal fees, event registrations, donations, and (in future) E-commerce purchases online, using a credit card processing system that we make available to every club and association.

When transactions clear through our credit card processor they are deposited automatically in our bank account. Three times a month (on the 10th, 20th and last day of the month), the system generates an automated transfer (ACH) of these funds from our bank account to your bank account. A complete accounting of the source of these funds is provided online, allowing you to match the transactions on your bank statement to the underlying member transactions.

ClubExpress can also distribute funds for you across multiple bank accounts. For example, if your organization has chapters, districts and/or regions that also collect dues, the system can be configured to divide these dues up automatically.

(For larger clubs and associations, ClubExpress can also support your own credit card account with deposits directly into your bank account, as long as the back-end payment gateway is Authorize.Net. Please contact us if you are interested in this option.)

At the end of each month, we use the same automated bank transfer facility to withdraw our monthly fee from your bank account. A complete accounting of all bank deposits and withdrawals is also provided online.

Chapter 3 – Screen Orientation

INTRODUCTION

This chapter describes the various components of a ClubExpress screen. Figure 3.1 below shows a typical screen, with the major components highlighted.

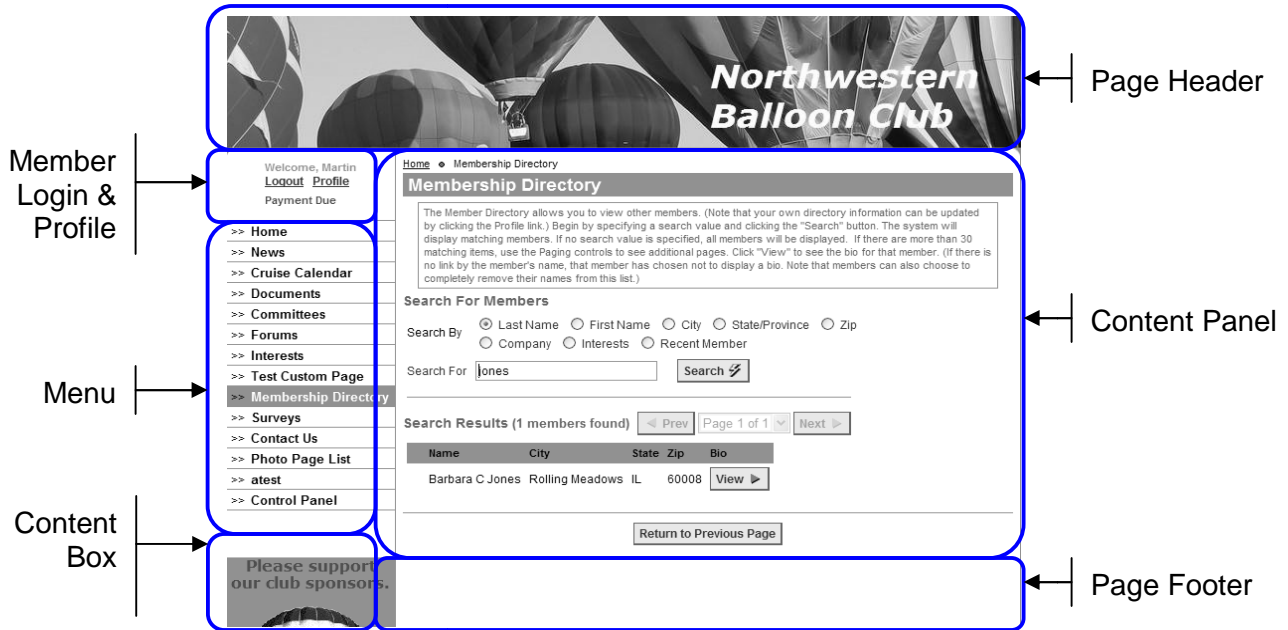


Figure 3.1 – ClubExpress screen

PAGE HEADER

Every page within an organization's website has a standard header. This header usually runs the full width of the page (although this is not required.) It can be any height although it is usually advisable to keep the header no more than 125-150 pixels in height so that it doesn't dominate the page. The minimum width is 750 pixels though this may vary from template to template.

ClubExpress includes a customized Page Header Designer, described on page 185. This designer will be slightly different based on the template and theme chosen for your club or association. It generally provides a number of pre-defined layouts with text and graphics in various positions. It also includes a custom layout option that allows a web designer to build a layout from scratch.

Effective page headers are often a single cropped photo, or a collage of photos, with the club's name and logo digitally placed across the photo. Other clubs work with a graphic artist to create the perfect image to insert in the header.

MEMBER LOGIN & PROFILE

Every page also includes a login panel. In the example above, this is a small rectangle on the left side, under the page header and above the menu. Other templates may have it in different positions and with different dimensions (for example, as a narrow strip across the top of the page, above the page header.)

This panel has multiple configurations:

- Site visitors and members who have not yet logged in will see the phrase **Member Login**. Clicking this link brings up the login page, allowing members to log into the site and view content reserved for members only.
- Members who have logged in will see a “Welcome <first name>” message. The Login link is replaced by two links: one to **Logout** and the other to jump to the member’s personal **Profile** page (see page 44).
- Members who log in and whose membership is up for renewal will see a **Renew Now** link. This is a shortcut to the renewal page, allowing members to renew their memberships with a couple of mouse clicks.
- Members who have pending transactions will see a **Payment Due** link. This is a shortcut to the Payments screen, allowing members to complete any pending payments.
- If your club has enabled Trial memberships, trial members will see an **Upgrade Membership** link.
- Your club or association may have enabled a **My Directory Listing** option. Clicking this link takes you to your bio page in the Membership Directory. From this page, you can edit the various elements of your directory entry, including your contact information, bio and answers to additional member data.

MENU

Every page includes a series of links to jump to other portions of your organization’s website. This is the navigation menu and you have complete control over the items placed on the menu, the text used to describe each item, and the sequence in which items are listed. Submenus are also supported.

ClubExpress supports different menus for members and for site visitors (or members who have not yet logged in.) Certain functions make no sense for members to see after having logged in (for example, Benefits of joining the organization and the Member Signup link.) On the other hand, certain functions are generally not shown to non-members (for example, the Member Directory.) You can also define different member menus based on the member type. For more information on changing menus, see page 188.

When a member who is also an administrator or coordinator logs in, a special choice is added to the screen, usually at the end of the menu. **Control Panel** gives access to the administrator-only functions, including:

- Updating club/association information, including titles and contacts;
- Updating membership configuration and the member database;
- Reviewing finances and bank transactions;
- Configuring the website;
- Viewing and printing reports, and exporting data.

The menus will generally be in one of two positions: vertically oriented along the left side of the screen; or horizontally oriented along the top of the screen. The system supports pop-out or drop-down submenus.

CONTENT PANEL

The main section of the website is the content panel. This is where pages and all custom content are displayed. It may contain text, images, tables, and other standard website elements.

Along the top edge of the content panel is a crumb trail.¹ This trail lists the logical path of pages from the home page to the current page. (Note that this may not be the actual path that a user has followed, since the various modules within ClubExpress are closely coupled to each other.) Each entry on the crumb trail except for the last one (representing the current page) is a link, allowing you to backtrack to an earlier page.

On the same line as the crumb trail but at the right margin, some users will see the word “Admin” in red. This link appears in every module when the current user is an administrator, and in selected modules where the current user is a coordinator of that module. Clicking the link takes the user to the administration screen for that module.



On the far left is a blue question mark icon. Clicking this icon displays a popup window with the ClubExpress online help system.

Under the crumb trail but above the module heading is a message area. In most instances, this area will be blank. Error messages appear in red while status and general informational messages appear in blue (or a similar “non-cautionary” color based on the current template, theme and style sheet.)

¹ The crumb trail is named after the story of Hansel and Gretel, who left a trail of breadcrumbs into the forest to help them return after being abandoned by their wicked stepmother. (Earlier versions of this footnote were wrong; in Greek mythology, Theseus used string tied to the entrance doorpost rather than breadcrumbs to traverse the fabled labyrinth and defeat the fearsome Minotaur.)

Print This Page

In the lower right corner of the Content Panel is a link to print the current page. When you click this link, your computer's **Print** dialog appears. Select an available printer and click the Print button. If you are running a Mac or have Adobe Acrobat installed, you can also save the current page to a PDF file.

CONTENT BOX(ES)

Some ClubExpress templates include additional areas that you can fill with any content. For example, templates with a vertical menu include a content box for editing the area under the menu.

Content boxes can be activated and de-activated, so they are also suitable for displaying seasonal content. As part of a custom template, content boxes can be added almost anywhere on the screen.

For more information on editing the content box(es) defined with your template, see page 185.

PAGE FOOTER

Every page also includes a standard footer with the following elements:

- A link to the Home page
- A link to the Contact Us module
- A link to the standard Terms of Use for the website (which appears in a popup window.) When a club or association signs up for ClubExpress, it agrees on behalf of its members to abide by these terms of use.
- A link to the standard Privacy policy in effect for this site (which also appears in a popup window.) When a club or association signs up for ClubExpress, it agrees on behalf of its members to abide by this privacy policy.
- A small notice from ClubExpress. This is also a link which brings up the *clubexpress.com* website in a separate window.

Organizations cannot control this panel. It is always placed in this position.

ADD ME TO YOUR MAILING LIST

Clubs and associations have the option of enabling an *Add me to your Mailing List* prompt on the public side of their websites. Clicking this link displays the following popup form:

The screenshot shows a web browser window titled "Northwestern Balloon Clubs - Windows Internet...". The address bar displays "http://democlub.clubexpress.com/popup.aspx?page_id=2308&club_id=2". The main content area is a popup form titled "Add Me To Your Mailing List".

The form contains the following fields and options:

- Instructions: "Complete the information below to be added to our mailing and emailing list. Click 'Save' when finished, or 'Cancel' to return without saving."
- First Name: Text input field containing "Test".
- Last Name: Text input field containing "Person".
- Email Address: Text input field containing "testperson@gmail.com".
- Address 1: Text input field.
- Address 2: Text input field.
- City: Text input field.
- State/Province: Dropdown menu showing "< Select >".
- Zip/Postal Code: Text input field.
- Country: Dropdown menu showing "UNITED STATES" with a "Show All Countries" link.
- Phone: Text input field.
- Cell Phone: Text input field.
- Fax: Text input field.
- Title: Text input field.
- Organization: Text input field.
- How did you hear about us?: Dropdown menu showing "Online Search (Google, Bing, etc.)".
- Category: Radio button labeled "Guest" is checked.
- Instruction: "Select the category or categories that best describe you."
- Buttons: "Save" (with a checkmark icon) and "Cancel" (with an X icon).

The browser's status bar at the bottom shows "Internet" and "85%" zoom level.

Figure 3.2 – Add me to your Mailing List

Users enter their basic contact information and how they heard about your club or association. They may optionally self-select themselves into one or more mailing list categories that you have defined and flagged to be visible. When they click **Save**, their information is added to the non-member database and they are assigned to the categories they have checked. The default category is "Interested Persons".

Chapter 4 – Creating Your Account

INTRODUCTION

ClubExpress allows you to sign up entirely online. This chapter explains the signup process, what screens you will see and what you will enter at each step of the way.

The initial sign-up process takes approximately 5 minutes. You will step through three screens prompting for basic information. Once the last of these screens is complete, a shell website with one administrator account (you) is created. You are taken to the Member Login page to log in and are then shown a Check List of additional tasks. At this point, your account is set up and you can log off.

To get back to this website, use the “Short Name” you specified during setup. For example: <http://ShortName.clubexpress.com>. You can then log in with the administrator username and password you also chose during setup.

The Check List comprises the important tasks that you need to complete before you can make your website live. If you have all of the necessary information at hand, this list of tasks will take 2-3 hours to complete. However, there are some tasks (such as verifying your bank information) that will take a couple of days. Once the setup fee is paid, you can also send us your current membership database and we will load it into ClubExpress on your behalf.

Once all tasks are complete, you can choose when to go live with your new website and membership database. Until you do, only you and any other administrators that you designate can see the website.

GETTING STARTED

Before you get started, you might want to assemble the following information, which will be needed during the setup process:

- A copy of your organization’s bylaws;
- A copy of your organization’s articles of incorporation (if this document exists.)

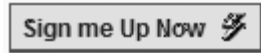
Once you get past the initial setup screens, the following information will be useful for the Setup Check List:

- Your printed membership application;
- Your club’s or association’s logo in an electronic format, ideally no larger than 125 x 125 pixels;
- Photos and images that you plan to use on the home page;
- Bank account information.

SIGNING UP – STEP 1

To sign up for ClubExpress, go to our website <http://www.clubexpress.com>.

At the top of the screen, click the “Sign Up Now” link. Take a moment to read the page shown; when you are ready, click the large button in the middle of the screen:



You will see the following screen:

[Home](#) ♦ New Club Signup Wizard

Club Registration - Basic Club Information

This is a wizard with three screens, each prompting for different information which is necessary to set up your account. Once these screens are complete, your account and web site will be created and you will be taken to a list of additional tasks which must also be completed. Your web site and membership database will not be visible to members or the public until you explicitly authorize this step, so you can take as long as you need to complete the configuration of your site.

Begin by specifying the various names by which your club is known, its founding year, and incorporation status. The Short Name must be specified without spaces; letters, numbers and the underscore only. Until a unique domain name is set up for you, the Short Name will be used to access your club's web site.

Specify your club's address and other basic contact information. You should also provide a brief description of your club's purpose. (Among other uses, this description will be used to help find your club in Internet search engines.) When you have finished, click the "Continue to Step 2" button to move to the next screen. If you don't wish to sign up at this time, click any of the links on the menu to cancel.

Club Data

Enter the commonly used public club name.

* Club Name

* Short Name

* Year Founded

Enter a brief description of the club's purpose.

Purpose

If a ClubExpress Representative assisted you with your decision, please enter the Rep ID here.

ClubExpress Rep ID:

Mailing Address

Figure 4.1 – Club Registration Step 1 – Basic Club Information

This screen prompts for the basic information about your club or association, including its official name, year of founding and purpose, contact information and tax status.

At any time, you can cancel the setup process by clicking on one of the menu choices on the left side of the screen.

Club “Short Name”

Many organizations own their own Internet domain name, such as *ChicagoCorvettes.org*. This name is used to find the club’s website on the web. For example:

www.chicagocorvettes.org

ClubExpress fully supports this type of domain name. In addition, ClubExpress supports an alternate method of finding your club’s website, the “Short Name”, also known as a SubDomain. For example:

chicagocorvettes.clubexpress.com

└──────────┘

SubDomain

This method is used in three different ways:

- When you are creating and configuring your account, before your Internet domain name has been pointed to your website.
- For clubs or associations that don’t have their own domain name.
- The system automatically switches to this format when members log in. We do this so that everything for a logged in member can be done in a secure session (SSL), so that members are comfortable that everything they do as members (including credit card transactions and updating confidential information) is secure.

The Short Name is the name you want to use for your organization’s sub-domain. This name may only contain letters and numbers, no spaces or punctuation characters. It must be unique among ClubExpress organizations and certain names are reserved by the system and cannot be used.

Important Note: the Short Name cannot be changed while your website is in use. If you need to change it, do so at the very end of the evening, before finishing for the night. After the system is reset in the middle of the night, the new Short Name will be in effect.

Note that the following is *never* correct:

www.chicagocorvettes.clubexpress.com

Users do not need to put www. in front of the shortname.

SIGNING UP – STEP 2

Clicking the **Continue to Step 2** button displays the following screen:

Home ♦ New Club Signup

Club Registration - Club Administrator Contact Information

The next step is to enter your contact information, including a username and password. You will be set up as the first administrator for your club and web site. (Later, you can add more administrators and remove yourself if you wish.) Usernames and passwords should contain letters and numbers only (no spaces), and should be between 5 and 15 characters long. When you have finished, click the "Continue to Step 3" button to move to the next screen. You can also go back to the prior step, or click on a menu choice to cancel.

Club: NW Ballooning Association, LLC

*First Name

*Last Name

*Phone

*Email Address

*Login Name

*Password:

*Re-enter Password:

Figure 4.2 – Club Registration Step 2 – Administrator Contact Information

This screen sets up the first member/administrator account in the system. Each club or association needs at least one administrator and, initially, you're it. Enter your contact information, username and password.

Usernames should contain letters and numbers only and should be between 5 and 15 characters long; the username is not case-sensitive. Passwords should be of a similar length and may contain any characters, including punctuation symbols. Passwords are case-sensitive.

SIGNING UP – STEP 3

Clicking the **Continue to Step 3** button displays the following screen:

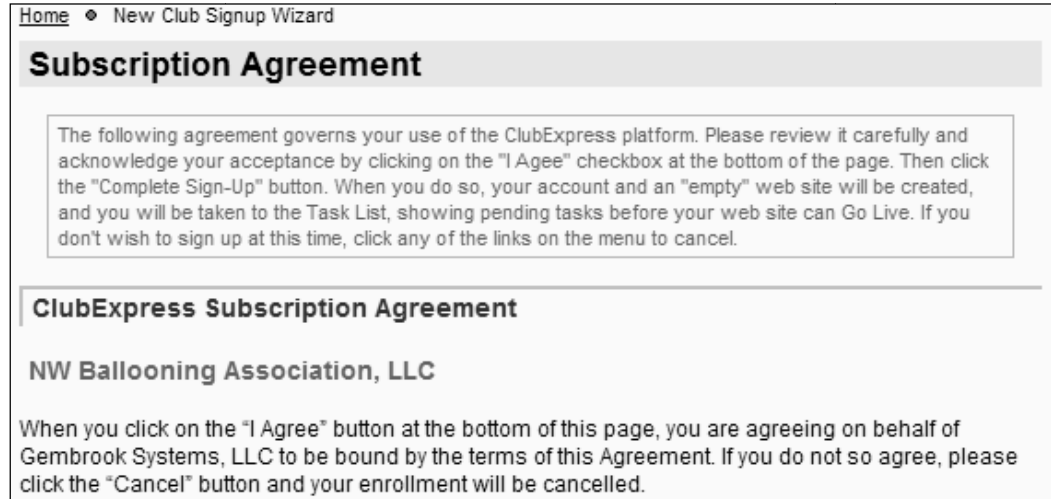


Figure 4.3 – Club Registration Step 3 – Subscription Agreement

This screen lists the agreement that governs your use of ClubExpress. Please review it carefully. In order to proceed, you must scroll to the bottom of the page and check the **"I agree on behalf of <your club name>"** checkbox. If you have any questions about this agreement or your rights and responsibilities, please call our toll-free customer support number and we will be happy to answer them for you.

Click the **Complete Sign-Up** button to complete the sign up process.

At this point, your account is created and a blank website is defined. An email is also sent to the email address you specified, confirming your account and login details.

The next step is to login in with the user name and password that you specified in Step 2. Enter this information and click the **Login** button. You will then be taken to the Club Setup Check List, which is described in the next chapter.

Chapter 5 – Club Setup Check List

INTRODUCTION

When you login after having created your account, but before your website is switched live, you are taken to the following screen:

Home • Setup Checklist

Setup Checklist

At this point, your club account and web site have been created. The web site will not be visible to the public and your members until you click on the "Go Live" option below. But there are many things you should do before taking the site live. At this point if you need to leave, you can log out and return later. Until the site is live, when you log in again, you will be taken to this screen. We suggest that you review each of the following screens to provide the requested information. When you have completed each task shown, you will have a full-featured web site and membership database for your club.

If you would like us to load your existing membership database into the system, or if you have any questions about this process, please call Customer Support toll-free at 1-866-HLP-CLUB (457-2582).

- ✓ **Club Info - Name and Description**
Enter basic info about your club, including name, address, etc.
- ✓ **Subscription Agreement**
Review the ClubExpress licensing agreement
- ✓ **Create Member Types**
Define the types of members your club has and how they pay their dues
- ✓ **Specify Renewal/Expiration Settings**
Define the overall club rules for membership renewal and expiration
- ✓ **Specify Membership Options**
Customize the accessibility of information on your website
- ➔ **Enter Bank Account**
Enter the club's bank information

NOTE: If you are going to use trial mode, please do not enter your bank information. Call us at 1-866-HLP-CLUB (457-2582) when the rest of the checklist is complete, and we will activate your site.
- ✓ **Select Template and Theme (look and feel of the website)**
Select the layout, design, and colors you want to use for your website
- ✗ **Common Content - Create Page Header**
Create the heading which will appear at the top of every page in your website.
- ✗ **Activate and Configure Built-in Modules**
Select the pages you want to use for your web site
- ✗ **Configure Website Menus**
Arrange the navigation menus for your website
- ✗ **Create Home Page**
Create the home page for your club's website

Figure 5.1 – Club Setup Check List

The first few items are complete and marked with green checkmarks. The next item is flagged with a red arrow while other items have a grey X. You can select items in any order.

Below the Setup Check List you will find a link to this Administrator Manual. By all means download it and have it available for reference. We know it's huge but you don't need to read it all; if something doesn't make sense, you can usually find it quickly in the manual and read just a few pages. We also suggest that you NOT print it since we do update it regularly as new features are added.

Your organization's website cannot be made visible to the public and your members until all items on this list have been checked off. These represent the minimum tasks that you need to perform to create a working website.

Once your website is live, this Check List screen is no longer shown. Instead, each item is accessed from the **Control Panel** and can be updated at any time. Here is a list of the remaining items and the section in this manual where each is discussed.

Create member types	Page 115
Specify renewal/expiration settings	Page 125
Specify membership options	Page 128
Enter bank account	Page 227
Select template and theme (look & feel)	Page 183
Common Content - create page header	Page 185
Activate and configure built-in modules	Page 188
Configure website menus	Page 199
Create home page	Page 280

Bank Information

Note that the **Bank Account** screen has two versions. When you initially select the screen, you are prompted for information on your organization's bank account, including the bank name, routing number and account number. Once this information is entered, the system generates two small test transactions to verify that the information is correct. Your bank account will receive a deposit and a withdrawal of a randomly-generated token amount under \$1.00. We don't tell you the amount. Instead, you must contact your bank online or by phone to get the amount from them. Then, select this option a second time where you will be prompted to enter the transaction amount. Clicking the **Verify** button checks the amount you entered against the system amount and, if they match, the bank account is activated. This is how we know that the data you entered is correct.

If your bank information ever changes, you can access this screen from the Control Panel. New test transactions will be generated to verify the changed information.

ClubExpress allows you to enter multiple bank accounts and to distribute membership fees, additional charges and event registrations into different accounts automatically (as long as we are handling these funds for you.) Using the Check List, you will be specifying just the primary or default account, but you can add other bank accounts later from the Control Panel.

TRIAL MODE

If you want to sign up for ClubExpress Trial Mode, do everything on the Check List *except* the Bank Information. Then call us and we can manually switch your site live. Trial Mode lasts for up to 60 days, by which time you must decide whether to continue using ClubExpress (entering your bank information and paying the fees described on the website) or whether your ClubExpress site will be shut down.

In Trial Mode, you can do everything except the following:

- Pay pending transactions by credit card;
- Import a non-member database;
- Define email accounts based on the club's domain name(s);
- Configure discussion forums as email-based listservers;

OTHER OPTIONS

The Setup Check List consists of *required* items. But other administrative tasks within ClubExpress can also be configured at any time. To access these tasks, click the **Control Panel** link on the menu. To return to the Setup Check List, click the **Check List** link which is also on the menu.

(The Check List is actually just a shortcut to the 11 necessary tasks to create a valid membership database and website. Each of these tasks and about 50 others are available through the Control Panel. When your site goes live, you can still modify any Check List item through the Control Panel.)

Until your site is active, entering the club's URL or *subdomain.clubexpress.com* name displays the login screen. Only administrators can log in and they are taken to the Check List. To add additional administrators, perform the following steps:

1. Select **Control Panel – Member Manager**
2. Click **Add Member** to add the new member. Follow the wizard prompts.
3. When you get to the Payment screen, mark the member as having paid through an external system.
4. Select **Control Panel – Administrators/Coordinators**
5. To the list of administrators, add the member just added to the database.

Administrators who are logged in also have access to their personal profile menu. The Member Profile is discussed in more detail in Chapter 8.

Clicking the **Home** link displays the home page, which is initially empty. But the home page editor allows you to fully customize the club's home page. For more information, see chapter 17.

GOING LIVE

When all items on the Check List are showing a green checkmark, a **Finished** button will appear at the bottom of the page. Click this button to tell ClubExpress that you have finished with the Check List; it will disappear.

Then, select **Control Panel**. At the bottom of the page is a button titled **Activate Your Website**. Click this button to make your site accessible using the subdomain format described above. For example:

http://ChicagoCorvettes.clubexpress.com

(Note that “www.” is not required when this format is used.)

This feature allows you to keep your current website active using your main domain name, while you fully build-out your new ClubExpress site. Even after the Check List is complete, there are many tasks that still need to be performed, (for example, uploading documents and photos, defining committees, building custom pages and adding upcoming events to your calendar.)

(When you activate the website, we will automatically charge the one-time setup fee which is required as part of your sign up. If you took advantage of Trial mode and then entered your bank information, the setup fee is charged when we take you out of Trial mode and into Active mode.)

From this point forward, visitors will see the home page and can log in to see member's-only content. Administrators, once they have logged in, will see a special **Control Panel** choice at the end of the member's version of the menu.

At any time, you can take the website offline by going back to the **Control Panel** and clicking the same button, which now reads **Take Club Website Offline**. This option is used when you want to make major changes to a site and then present the new look and feel once everything is ready. However, when the website is offline, users who go the site will be taken to the login page and only administrators can login; the website is completely unavailable to the public and to members who are not administrators.

REMAINING TASKS

Once your website is live, there are a few additional tasks before you can be fully launched. These are not done until your website is active and the setup fee has been paid.)

Loading the Membership Database

The ClubExpress support team can load your existing membership database into your new website. Having us do this is recommended for all but the smallest clubs and for new clubs just getting launched.

We accept databases in many common formats, including MS Excel and Access, Paradox, dBase and CSV (Comma Separated Values, with one member per line, commas between fields, and double-quotes around text elements.) If you are currently using another format, please contact our support department to discuss.

When you send the database to us, there are a number of data and formatting requirements that must be followed. These can be found in Appendix A of this manual. Also, once you have sent us the database, please don't add or remove members through the website until the database has been loaded.

Processing and loading the database takes 3-5 business days. The members are loaded with a special status called "Bulk Loaded", which allows you to review and correct the data. Bulk Loaded members are *not* notified about the new website and *cannot* log in.

Loading the Non-Member Database

If your club or association has a "non-member" database of additional contacts, this information can also be loaded into the non-member database built-into your ClubExpress website. See Appendix A also for specifications.

Switching your Internet Domain Name

If your club or association already owns an Internet domain name (*ChicagoCorvettes.org*, for example), you will need to inform your domain registrar of the new name servers. This is done by logging into your domain account at your registrar (not your ClubExpress account), selecting the domain and entering the following information in the appropriate position:

Primary NameServer: a.dns.clubexpress.com
Secondary NameServer: b.dns.clubexpress.com

Once you save your changes, it takes about 24 hours for this information to fully propagate around the Internet.

Please let us know when you do this, since we also need to make a couple of manual changes within ClubExpress so that our servers recognize this new information.

Also be sure to tell us if you have email accounts associated with this domain and you will keep those accounts at your current email provider. The changes we need to make are slightly different if we're not also handling email for you.

Note that the email forwarding and forum listserver features in ClubExpress can only be activated using domain names where we are handling email for those domains. The system will not allow you to create email forwarding accounts or forum listservers using domain names where another provider handles email. If you want to use forum listservers in this situation, you may need to obtain another domain name specifically for this purpose.

You should not make this change until you are ready to completely switch off your old website and move entirely to the new one on ClubExpress. But you should make this change before sending the welcome email out to your members, so that the club's actual domain name is reflected in the email.

If you do not own a domain name, it is simple to obtain one. Many domain registrars can help you find an available domain and register it. (We use GoDaddy.com ourselves, as do many of our customers.) The instructions for pointing a domain name to our name servers apply to any registrar. Note that ClubExpress is not a domain registrar.

Please also review the comments on page 27 regarding when your domain name is used and when we revert to the "shortname" in your URL.

Setting up your own Merchant Account

ClubExpress includes a built-in merchant account. What appears on member statements says "ClubExpress" and the funds flow to us. Then, 3 times a month (on the 10th, 20th and last day of the month) we remit those funds directly into your bank account using an ACH transaction (how banks transfer funds between themselves.) At the same time, we collect the merchant processing fees associated with this revenue.

Some clubs and associations want their own merchant account and ClubExpress supports this. When you have your own merchant account, what appears on member statements will be your club or association name. The funds also flow directly into your bank account without spending a few days first in our account. This option is especially suitable for larger organizations that want to reinforce their brand and identity, and perhaps to "hide" the fact that ClubExpress is being used to manage their website. ClubExpress does not charge transaction or processing fees if you have your own merchant account.

In general, non-profit clubs and associations are welcome to use the built-in merchant account. However, there are number of specific situations where we require that you set up your own merchant account:

- If you are running a membership-based business rather than a non-profit club or association;
- If you want to activate the Storefront module to sell merchandise through your website;
- If you want to accept donations through the Donations module in excess of \$500.
- If you want to enable automated membership billing, where members are renewed automatically and their credit card on file is also charged automatically.

When you set up your own merchant account, you can use any merchant processor, but the payment gateway must be Authorize.Net, the gateway that ClubExpress has been written to work with. Configuring your own merchant account within ClubExpress takes 5 minutes, after which you should run a small test transaction through the system.

ClubExpress can help you set up a merchant account through a partnership with our merchant processor. Contact us for more information.

For more information on configuring your own merchant account, see Appendix D of this administrator manual.

Launching the Website to your Members

After all the above tasks are done, after you have finished defining modules and uploading photos and documents, and when you are ready to notify your members about the new website, let us know. We run a process in our office that does three things:

1. Generates a temporary username and password for each member.
2. Changes their membership status from Bulk Loaded to Active or Expired, based on the expiration_date you provided to us.
3. Sends a welcome email to each member with an email address. This message, which can be customized for each club, includes the temporary username and password, allowing members to log into the new site to update their password and other profile information.

For members without an email address, we will send you a file in CSV format, suitable for loading into Excel doing a Word mail merge with the same information as in the email.

Don't forget that this is just the beginning. Websites are living and breathing entities; they need to be maintained and updated, adding new event reports and photos, uploading documents, keeping the committee lists and contact lists current, and especially refreshing the home page. When people see a stale website, they stop coming. But if they see a vibrant up-to-date site, they keep coming back and are more likely to join and become actively involved in the club's activities. Active websites also have higher page ranks and more prominence in search engine result pages; prospective members and event attendees are more likely to find your club or association with an active website.

Chapter 6 – ClubExpress Users

INTRODUCTION

ClubExpress defines a number of user categories, which are described in more detail in this chapter.

- Site Visitors
- Club/Association Members
 - Solo Members
 - Primary Members
 - Secondary Members
 - Tertiary Members
- Forum Moderators
- Event Coordinators
- Module, Custom Web Page and Photo Page Coordinators
- Chapter, District and Region Administrators
- Control Panel Coordinators
- Administrators
- The Super-Administrator

SITE VISITORS

Your organization's website serves as the gateway to all of the functionality within ClubExpress. So everyone starts out by opening a browser and typing in your club's URL, for example:

<http://www.chicagoCorvettes.org>
<http://chicagoCorvettes.clubexpress.org>

The first screen shown is your organization's home page, which you have defined to highlight the club's or association's purpose, current or recent events, or news. You have complete control over the content of the site, the header that appears on every page and the overall look and feel of the site.

There is also a menu of additional pages and modules that you make available to site visitors or members who have not yet logged in. ClubExpress controls what visitors can see, to protect confidential club/association and members-only information, such as the membership database. Non-members will only see what you allow them to see, such as the benefits of joining the organization, lists of special interests, the events calendar and an on-line joining form.

Every page includes a standard footer which points to the Contact Us page, allowing visitors to contact a club or association officer or send you email, the Terms of Use of the site, and the Privacy Policy that ClubExpress adheres to, and that you agreed to when you signed up for ClubExpress.

CLUB OR ASSOCIATION MEMBERS

Every page also includes a small login panel that allows club or association members to log into the site. Clicking the **Login** link allows members to login with a unique user name and password.

Once logged in, members can see a different version of the organization's home page, with content that is reserved for members only. They will also see a different list of choices on the menu, including options that would not normally be shown to non-members (such as Committees and the Member Directory.) Other modules have additional options for members only; for example, the Interests module allows members to select an Interest to see who else has signed up for that Interest. From there, members can also view a member's Directory entry.

Once logged in, the login panel also includes a **Profile** link that leads to the member's profile page, described in Chapter 8. This page includes options that allow members to change their personal information stored in ClubExpress.

Depending on the Member Types you configure, there are variations among club or association members.

- Solo members are not linked to any other member accounts; they are only responsible for themselves and their own information.
- Primary members are created when you define a “family / business” membership type. This member has a primary login and one or more secondary and tertiary accounts under the primary login. For a primary member, the **Profile** screen includes an additional choice to manage secondary and tertiary accounts.
- Secondary members exist under a primary member who is assigned to a “family / business” membership type. Secondary members have their own login and identity within the system but their membership status is linked to the primary membership and renews or expires as the primary renews or expires. For a secondary member, the **Profile** screen excludes any choices related to renewals, the membership account, and credit cards. You can change the keyword used for a secondary member.
- Tertiary members exist under a primary member that is assigned to a “family / business” membership type. Like secondary members, their membership status is linked to the primary membership and renews or expires as the primary renews or expires. *Tertiary members cannot log into the website.* But if an email address is entered for them, they will receive emails sent by the club. Tertiary members have a **Profile** screen that is accessed by an administrator. Tertiary memberships are suitable for clubs where members join through their personal lives and the club needs to track children. For clubs where members join through their business or professional lives, they are suitable for tracking additional contacts at a business or location. You can change the keyword used for a tertiary member.

Note that for each of the following security levels, the user needs to be a solo, primary or secondary member in good standing before he or she can be a forum moderator, coordinator or administrator. Tertiary members cannot fill these roles because they cannot login.

FORUM MODERATORS

In the Discussion Forums module, you can define forum moderators who have limited administrative rights over a specific forum. Moderators can modify or delete individual messages or threads, or move part of a thread to another forum. For forums where messages must be approved before they are made public, moderators can review and approve or block these messages. Moderators can also ban members from posting messages if they don't follow forum rules (and remove bans for members who then agree to abide by the rules.) See Chapter 28 for more information.

EVENT COORDINATORS

When an event is created in the Event Calendar module, you have the opportunity to define an Event Coordinator who then has limited administrative rights to that event only. Event Coordinators can modify the basic information about an event, view a list of registrants, send emails to registrants, process payments, run reports and export event data.

MODULE, CUSTOM WEB PAGE AND PHOTO PAGE COORDINATORS

Selected members may be designated as Coordinators in one or more modules, custom web pages or photo pages. Coordinators have the ability to administer that module or page, adding or deleting content, categories, entries, or members within the module or page. Modules can have more than one coordinator.

Coordinators are defined by administrators, from the following options on the **Control Panel**, under the Website category:

- Built-In Module Index
- Custom Web Page Index
- Photo Page Index



For selected modules, custom web pages and photo pages, if your club has subgroups, when you define a coordinator you can pick the level that this person can manage. For example, you can define an event calendar coordinator who can manage events belonging just to the Midwest region, or just the Dallas chapter.

CHAPTER, DISTRICT AND REGION ADMINISTRATORS



If your club or association has subgroups, you can define administrators at each subgroup level. These administrators will see a special control panel with functions that apply to their subgroups only. For example, a chapter administrator has access to the Member Manager screen but it only shows members in that chapter. A district administrator could run reports for all members of the district, or filter the report to just the members of one chapter within the district. Individuals can be managers of multiple subgroups at the same time.

CONTROL PANEL COORDINATORS

Coordinators can also be defined to help manage functions on the Control Panel itself. For example, you can assign one or more coordinators to help maintain the membership database, without giving them access to other administrative functions.

This is done by selecting **Control Panel – Administrators/Coordinators**. The lower half of the screen allows you to define coordinators specifically for administrative functions.

Coordinators access the administrative functions in either of two ways:

- By clicking their own **Control Panel** choice at the end of the menu. This is a special version of the Control Panel showing only the modules and administrative functions available to that coordinator.
- For modules with a public and an admin component, by clicking the red **Admin** link in the top right corner of the module's main page.

ADMINISTRATORS

Selected members may be designated as club or association Administrators. These are usually the senior Board members (Membership Director, Treasurer, etc.), plus one or more people charged with managing the website itself.

Administrators have access to all information about the club or association and its members, including the membership database and financial transactions that are processed by ClubExpress. Administrators can change the overall look and feel of the site, the layout of menus, and which modules are made available to members and visitors. They also have the ability to take the website offline or bring it back online.

Administrators can also appoint and remove other administrators. This is done by clicking **Control Panel – Administrators/Coordinators**. The initial administrator account is created when the club signs up for ClubExpress. After that, a small number of additional administrators can and should be added to the system, so

that someone can access the site if the original administrator becomes unavailable. After that, administrators can be added or removed as necessary to allow for changing membership and roles within the club or association.

The system requires at least one administrator.

THE “SUPER”-ADMINISTRATOR

At ClubExpress, we have “super”-administrator rights on all clubs and associations. We can log into any website as an administrator to help with support tasks and troubleshooting, and to review sites for compliance with the Subscription Agreement and Terms of Use.

Chapter 7 – Logging In

INTRODUCTION

Every primary and secondary member has his or her own account in ClubExpress. When a website is first displayed, the Login link allows members to login into their accounts with a user name and password and to access member-only features. Members who forget their password enter their email address and first name into a special dialog, allowing the system to generate a temporary username and password.

LOGGING IN

Clicking the **Login** link displays the following screen:



Figure 7.1 – Login Page

Enter your user name and password and click the **Login** button. Click **Cancel** to return to the home page.

If you check the **Remember Me** option, the system will store a cookie on your computer that allows you to login without having to enter your user name and password each time. This cookie is secure; it does not contain your actual user name and password. But you should only select this option on a computer that you control, so that others cannot log in as if they were you.

To cancel the Remember Me option, once you have logged in, click the **Profile – Username/Password** link. Re-enter your password, then uncheck the option and save.

RETRIEVING A LOST USERNAME/PASSWORD

If you forget your username and/or password, click the **Forgot My Username/Password** button. The following popup window is displayed:

Figure 7.2 – Retrieving a Lost Username and Password

The system will prompt you to enter your email address and, optionally, your first name. When you click **OK**, the system will search for this information in the club's membership database. If one matching record is found, the username and a new temporary password is generated and sent to the email address on file. You will need to retrieve this information before you can log in, and the system will then give you the chance to change it.

If no match was found, or if multiple matches were found, the system cannot generate a new temporary password. If this happens, or if your email address is no longer valid, call a club or association officer or ClubExpress toll-free on (866) 457-2582 to have your password reset manually.

Chapter 8 – Member Profile

INTRODUCTION

The Member Profile system is where you modify your personal information and preferences as a member of the club or association. Here you can update:

- Name
- Address
- Phone numbers, email address and website
- User Name and Password
- A complete history of transactions done through the system
- A complete history of payments made to the club
- A complete history of events you have attended
- Whether your credit card is stored (securely) by the system
- The information in the member directory
- Links to social networking websites such as Facebook and LinkedIn
- Your answers to additional member data asked by the club or association
- Your Interests
- Preferences and subscriptions in discussion forums
- Secondary and/or Tertiary member accounts if you are a Primary member
- Resign your membership if it was configured for automated charging

Your club or association may also allow additional information to be stored, including an alternate address, work information, your date of birth, etc. As ClubExpress is enhanced, additional menu choices will be added to the Member Profile system to reflect these options.

ACCESSING YOUR MEMBER PROFILE

To access your Member Profile, you must first log in using your Username and Password. Click the **Member Login** link near the top of the screen. Once you have logged in, this prompt is replaced with a welcome message and two additional prompts: **Logout** and **Profile**. Click the Profile prompt to enter the Member Profile. You will see the following screen:

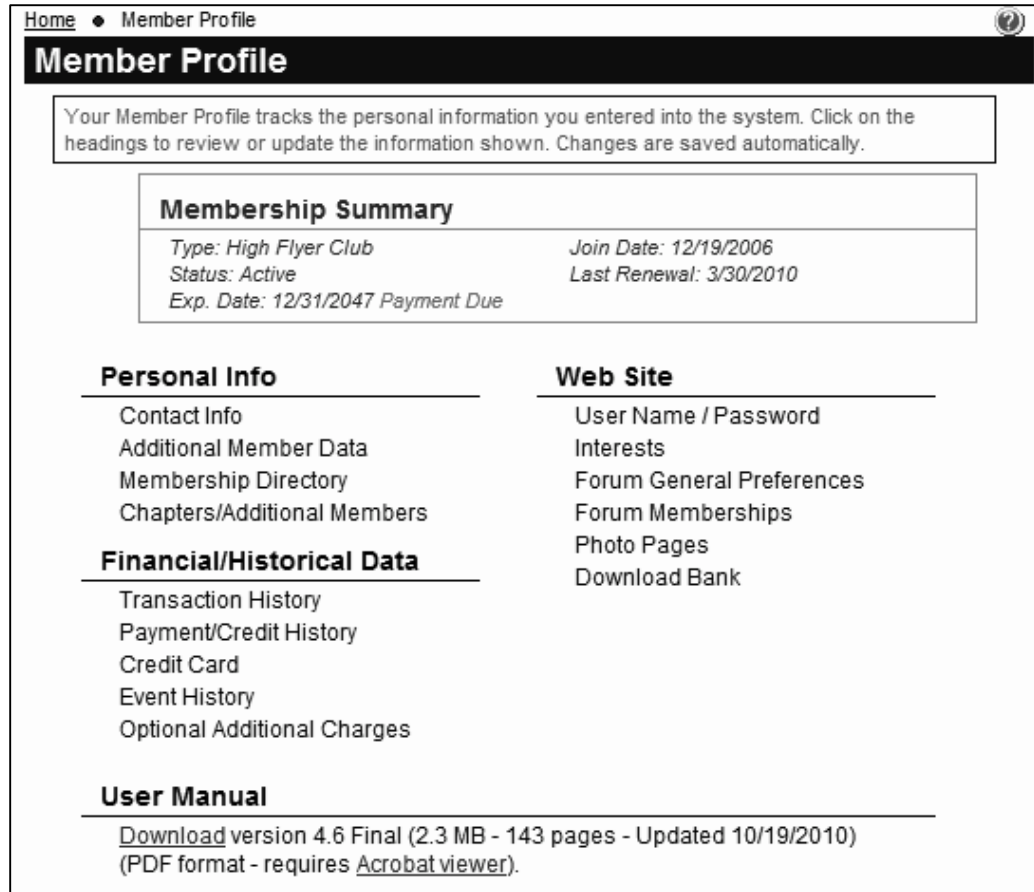


Figure 8.1 – Member Profile

At the top of the screen is a Membership Summary panel, showing your membership type and status, club join date, expiration date and date of last renewal. If it's time to renew, a red **Renew** link will be displayed; if you have a payment pending, a red **Payment Due** link will be displayed; and if you're a Trial member, a red **Upgrade Membership** link will be displayed. Each of these links can be clicked to launch the appropriate wizard or screen.

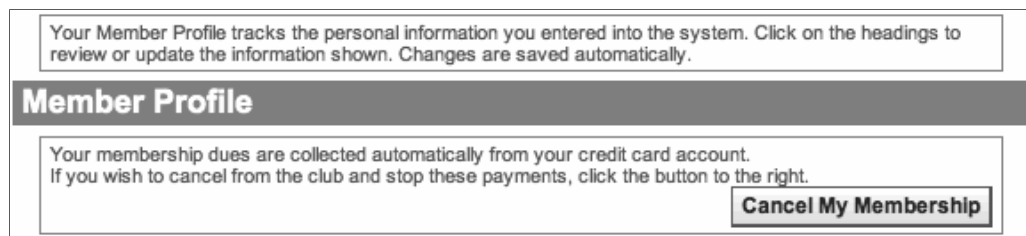


Figure 8.1a – Member Profile with Automated Renewal and Payment

If your member type is configured for automated renewal and payment using a stored credit card, you will see a special panel at the top of the Profile allowing you to resign your membership and stop the charges. Click the **Cancel My Membership** button and confirm this action.

If you have a bad email address, a special notice will be displayed under the “Exp. Date” line. Click the link to deal with this email problem. (See the section at the end of this chapter for more information.)

The following choices are available: (Some may or may not appear depending on whether that option has been enabled by your club or association.)

Personal Info

- Select **Contact Info** to modify your name, address(s), phone number(s), work information, and email address.
- Select **Additional Member Data** to provide answers to specific questions configured by your club or association. This option is only shown if your club or association has defined additional questions.
- Select **Membership Directory** to update additional information that is shown in the directory, including your bio, links to social networking websites and photo. This is also where you specify how much information to show to other members.
- Select **Chapters/Additional Members** to maintain your chapter affiliations as well as secondary and/or tertiary memberships associated with your membership. This option will only appear if your member type supports chapter affiliations or allows secondary/tertiary memberships and if you are the primary account holder.

Financial/Historical Data

- Select **Transaction History** to view and print a list of your transactions (membership renewals, event registrations, purchases, etc.) through ClubExpress. This option may appear for secondary members if they have event registrations but it will never show membership renewals since the primary member handles these.
- Select **Payment/Credit History** to view and print a list of your payments made through the system, and a separate list of credits you have received.
- Select **Credit Card** to decide whether to store your credit card in the system (it’s fully encrypted and very secure.) Credit cards are used to renew your membership, register for events and purchase club or association merchandise. This option does not appear for secondary members or for administrators editing profiles other than their own. This option may behave differently if you have picked a member type that renews automatically (for which a current credit card is required.)
- Select **Event History** to view and print a list of events you registered for and attended (if attendance is being tracked.)

- Select **Optional Additional Charges** to purchase one or more of the club's additional charge options, which are otherwise only available during signup or renewal time.

Website

- Select **User Name / Password** to modify the user name and password used to log into the system. On the administrator version of the profile, this option is replaced with **Reset Password**.
- Select **Interests** to let other members know what expertise and interests you have within your club. This option is only shown if your club or association has enabled the Interests module.
- Select **Forum General Preferences** to specify your general preferences for participation in discussion forums. This option is only shown if your club or association has enabled the Forums module.
- Select **Forum Memberships** to specify your preferences for individual forums, including whether you are subscribed to the forum and how or whether emails should be delivered.
- Select **Photo Pages** to upload photos and organize them into personal photo pages. This option will only appear if your club or association has enabled member-level photo pages.

User Manual

Select this option to download a user's manual for ClubExpress. This manual is in Adobe Portable Document Format (PDF); there is also a link to a free Adobe reader.

Note that other options that are club-specific or association-specific may also be displayed. These options were programmed especially by ClubExpress for your organization allowing the database to store information that is unique to your organization. Click the link to display the custom content with its own instructions.

RENEW

Click the red **Renew** link to renew your membership. This choice only appears if your membership is up for renewal. You will be taken into the Member Renewal wizard, the first screen of which is shown below:

Home ♦ Membership Renewal

Membership Renewal for Jon Harrison Step 1 of 3

Use this screen to update this user's membership. The current membership type is shown below; make any necessary changes. The list of available membership types comprises all available types, including those which are not available to members when they join (such as complimentary memberships.) Then click the "Next" button at the bottom of the page to continue to the next step.

Membership Status Expired 7/1/2004

Membership Type ▼

All people living in a household.

New Expiration Date

Current Total \$40.00

Figure 8.2 – Renewal

Select a membership type and click **Next**. If your membership includes additional secondary and/or tertiary members, or if your association supports chapters, you will next be able to update this information, since it may affect the membership fee you are charged. If additional charges are defined, you will also have the opportunity to add them to your current total. You might also be asked to affirm the club's Joining Agreement. The next screen is the payment summary, giving you an opportunity to review the information entered. From this screen, you can proceed to the payment screen to complete the renewal.

Payment



Click the **Finish and Proceed to Payment** button. A screen similar to the following will be shown:

Home • Control Panel • Pending Payments • Make Payment


Make Payment for dan j nitzel (89)

The list below shows outstanding payments due for the current member. Use the checkboxes to select which payments to make. Then, make a choice in the "Select Payment Method" dropdown list. If paying by credit card, enter the required information, and press the "Submit Payment" button. Please allow a minute or so for the transaction to complete.

If paying by check, enter the check number and adjust the payment date if necessary. Press the "Submit Payment" button.


Fields marked  require an entry. Click  to change amount.

[Print Invoice](#)

Sign Up (12/17/2005) Due \$ 55.00 Pay \$ **55.00** 

Adult	30.00
Season Ticket Pass	25.00
Transaction Total:	55.00

Total Selected For Payment **\$ 55.00**

Select Payment Method < Select Payment Method > 

Review the payments due, and select the items you wish to pay for now. Then, select a payment type and follow the instructions provided.

Refund Policy: The refund policy is set by Northwestern Balloon Club. Refund requests must be directed to Northwestern Balloon Club - they cannot be handled by ClubExpress.


Cancel 

Figure 8.3 – Pending Payments

This screen shows one or more payments pending, including the detail for each. Each payment is checked by default, but you can uncheck individual payments to change the total selected for payment.

Partial Payments



Some event registrations allow a partial payment to be made. If you see a pencil icon beside the transaction amount, click it to modify the amount. You will see a recommended payment amount. The system will also enforce a minimum payment amount that is set for each event.



Type the partial payment amount and press [Tab] or click off the field. You can also click the undo icon to revert to the original amount owed.

Payment Method

There are generally two payment options:

1. Pay online by credit card. With this option, you are presented with a credit card payment screen, including the option to store the card in the system.

You must explicitly authorize ClubExpress to charge your card. Click the **Submit** button to process your transaction, after which a summary screen is presented.

2. Print an invoice and mail a check. An invoice is displayed in a popup screen together with the Print dialog allowing you to print the invoice. When you are done, click the **Done** button on the main screen to exit the Renewal wizard.

Note however that your club or association may have chosen to disable checks or credit cards, so one of these options may not be present.

Note also that member types that require automated renewal payments do not include the option to store your credit card in the system. It will always be stored.

Finally, note that administrators see additional options for handling the payment.

If you choose to pay by check, or if you select credit card but the transaction does not complete, your payment is flagged as Pending and can be “revived” at any time. If you have pending payments, you will see a **Payments** link when you log in as well as on the Profile screen. Clicking it takes you to the above screen where you can print another invoice or choose to pay by a different credit card.

CONTACT INFORMATION

Click **Contact Information** to modify your name, address(s), phone number(s) work information, and email address. You will see a screen similar to the following:

.home • Member Profile • Contact Information

Contact Information

This screen allows you to enter more contact information than was supplied in the Membership Application. Specify a Nickname to be used in correspondence. The Secondary Address can be used if you spend a significant part of the year living at another location. Use the Enable checkbox to activate this address in place of the Primary Address.

General Information

Member Number 3

Title

*First Name

Middle Initial

* Last Name

Nickname

Spouse First Name

Spouse Last Name

Primary Address

* Address 1

Address 2

* City

* State/Province

* Zip/Postal Code

* Country

* Home Phone

Figure 8.4 – Contact Information

ClubExpress provides two versions of this screen, one for clubs where members generally join as individuals and one for associations where members generally join through their work or business. Behind the scenes, each form collects the same basic information.

Required fields are indicated with a red dot. The Nickname, Spouse Name, Secondary Address and Work Information fields are optional and may not be visible if your club or association is choosing not to collect this information.

You may also see an option to receive a printed newsletter or to download the newsletter from the website, thereby saving the club some money.

Click **Save** or **Cancel** to close this screen and return to the Member Profile.

ADDITIONAL MEMBER DATA

Every club or association collects member information that is unique to the organization. This information helps to create a more vibrant club that is in tune with its member's needs. In some cases, this information is required by government regulation, or by the organization's insurance carrier. Within ClubExpress, this is done using Additional Member Data.

Your club or association may have defined additional questions that you answered as part of your membership application or here in your profile. If this option is present, selecting it displays a screen similar to the one below:

Home • Member Profile • Additional Member Data

Additional Member Data

This page lists the Additional Member Data that you provided when you joined the organization. It may also list additional questions that will help us to provide better services to you. Required questions are indicated by an asterisk.

What is your ABA Number?

How many years have you been flying balloons?

What level of certification have you achieved? (not editable)
 Assistant

Save ✓ Cancel ✕

Figure 8.5 – Additional Member Data

The answers to questions can take many forms, including Yes/No, a number or date, a selection from a list or a text response. Each question will have an answer “field” beside it which is appropriate for the question. Required questions are shown with a red dot. Some questions may be editable by administrators only.

Click **Save** or **Cancel** to return to the Member Profile screen.

MEMBER DIRECTORY

Click **Member Directory** to update the information shown in your membership directory entry, including a personal bio and photo. You can also choose what level of contact information to display. You will see a screen similar to the following:

Home • Member Profile • Membership Directory

Membership Directory - Martin D Smith

This form allows you to store additional information to be shown in the Membership Directory. Use the Visibility drop-down list to decide what level of information should be displayed. You can also enter a brief personal biography and upload a photo.

Visibility: Show all information

Member Birthday: <Month> <Day> <Year > Reset

Spouse Birthday: <Month> <Day> <Year > Reset

Anniversary: <Month> <Day> <Year > Reset

Social Networking

LinkedIn:
Enter your public profile name, under Account & Settings/Public Profile

Twitter:
Enter your Twitter username

FaceBook:
Copy and paste the id of your profile URL

MySpace:
Enter your MySpace display name

Figure 8.6a – Membership Directory (top part)

This screen may vary slightly based on which options have been enabled by your club or association.

Visibility

The **Visibility** drop-down list allows you to control what information is shown to other members in the Membership Directory (this module is normally not visible to non-members.)

If members join the club through their personal lives, the following options are available:

- *Show all information.* Everything is visible.
- *Show all information except email.*
- *Show name, bio, email, phone and work info; no address.* Everything is visible except your home and alternate addresses.

- *Show name, bio, email and phone; no address or work info.* Everything except your addresses and work information is shown. (Some organizations may not collect work information.)
- *Show name, bio and email; no address, work info or phone.* In addition to the above, your phone numbers are also not shown.
- *Show name and bio only; no contact information.* In addition to the above, your email address is also suppressed. But your bio, social networking links, and photo are still visible. If your club or association defined “Additional Member Data” to be shown on the Membership Directory, they will also be shown at this level.
- *Show name only; no bio or contact information.* With this option, your name, city and state are listed in the directory but no other information is provided. This is the default when your account is created.
- *Do not list me in the directory.* With this option, other members do not see you in the directory at all.

If members join the club through their business or professional lives, the following options are available:

- *Show all information.* Everything is visible.
- *Show all information except email.*
- *Show name, title, company, bio, email and phones, no address info.* Everything is visible except your address information.
- *Show name, title, company, bio and email, no phone or address info.* In addition to the above, your phone numbers are also not shown.
- *Show name, title, company and bio; no contact information.* In addition to the above, your email address is also suppressed. But your bio, social networking links, and photo are still visible. If your club or association defined “Additional Member Data” to be shown on the Membership Directory, they will also be shown at this level.
- *Show name, title and company only; no bio or contact information.* With this option, your bio and answers to Additional Member Data are also suppressed.
- *Show name only; no work, bio or contact information.* With this option, your name, city and state are listed in the directory but no other information is provided. This is the default when your account is created/
- *Do not list me in the directory.* With this option, other members do not see you in the directory at all.

Birthdays and Anniversary

ClubExpress allows you to store your date of birth, your spouse/partner's date of birth and your wedding anniversary. Some clubs or associations may not prompt for this information. Even if it's enabled, it's entirely optional. Clubs also have the option of not showing the year for birthdays and anniversaries.

To remove a birthday or anniversary, check the **Reset** box and click the **Save** button at the bottom of the screen.

Social Networking

If your club or association has enabled this option, you can create links to your public profile pages on the following popular social networks:

- FaceBook
- LinkedIn
- MySpace
- Twitter

The actual sequence is different for clubs and associations where members join through their personal lives or through their business/professional lives.

Enter your user ID for each service, which is usually the ID number at the end of the URL when you are viewing your public profile page. Do not enter any of the special characters between the domain name and your ID. For example, a typical Facebook URL looks like this:

[http://www.facebook.com/home.php#/profile.php?id="12345"](http://www.facebook.com/home.php#/profile.php?id=)

You only need to enter 12345 (without the quotes). We will handle the rest.

Click the **Test** button to test your link. A new window will be displayed, showing that social network and your profile page.

Note that you may also need to go into your Profile screen in each social network and make your page public to allow others to view it.

The Profile – Membership Directory screen continues below.

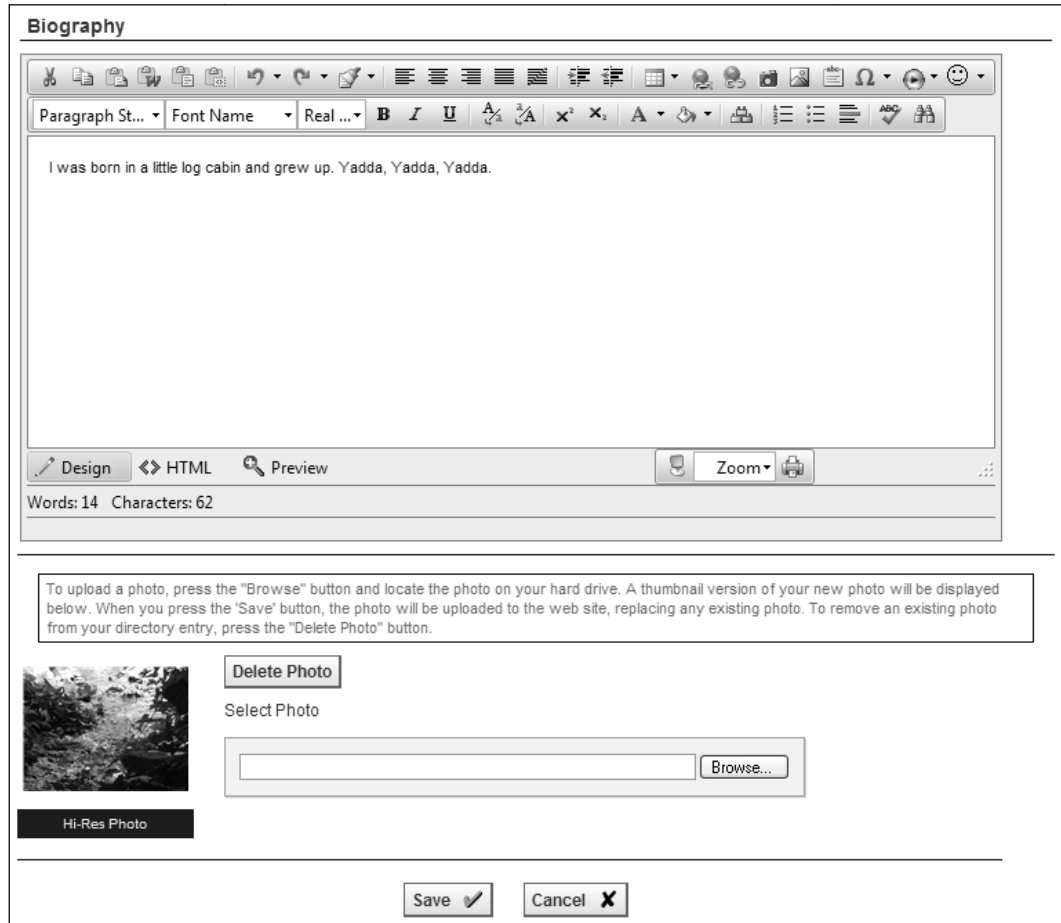


Figure 8.6b – Membership Directory (bottom part)

Biography

The biography field allows you to enter personal or biographical information about yourself. This will help other club or association members get to know you better, including your background, interests and expertise. This information is entered using the advanced content editor built into ClubExpress. This editor provides full control over fonts, colors and formatting. It allows you to enter links and images and is virtually unlimited in length. For more information on using this content editor, see Chapter 16 – Content Editor.

Photo

You may upload a photo to be included in your Member Directory entry. For screen resolutions, we recommend that the photo be no more than 80 x 80 pixels.

To upload a photo, click **Browse** and select the JPEG or GIF file from your hard disk. Then click **Upload Photo**. The photo will appear on the left side. If a high-resolution photo was uploaded an indicator bar will be displayed. To remove an existing photo, click **Delete Photo**. Click **Save** to save your changes and return to the Profile screen, or **Cancel** to return without saving.

For clubs that want to produce a printed membership directory, we can activate a special option that allows members to upload a hi-res photo, and allows the club to download these hi-res photos in a ZIP file, with the individual filenames within the ZIP indicating the member's name and number.

CHAPTERS / ADDITIONAL MEMBERS



This option will appear if you picked a membership type that includes additional secondary and/or tertiary memberships *under* your account. It will also appear if your club or association allows you (or your secondary and/or tertiary members) to join chapters. You will see a screen similar to the following

Chapters Only

If your club or association supports chapters but your membership does not support secondary and/or tertiary members, you will see a screen similar to the following:

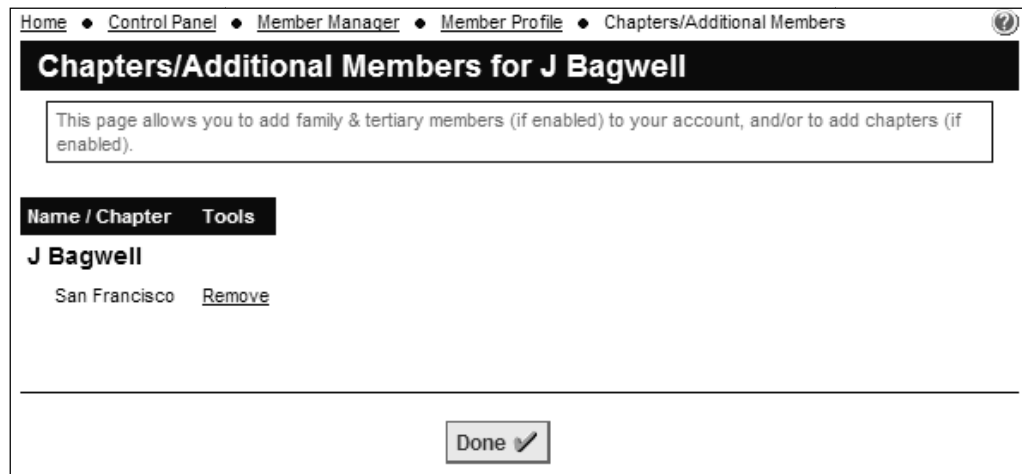


Figure 8.7 – Joining Chapter(s)

Some clubs allow members to join only one chapter while others allow members to sign up for multiple chapters. The **Add Chapter** link is used to add a chapter to your membership. You will see a screen similar to the following:

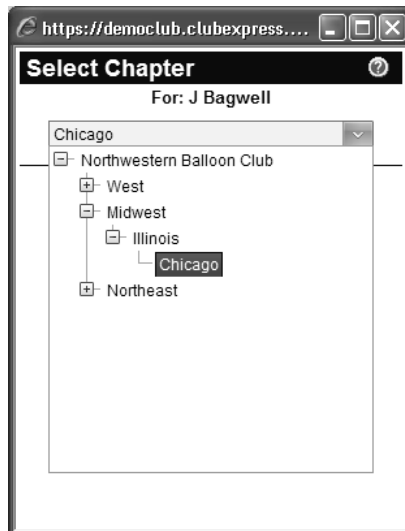


Figure 8.8 – Add Chapter

Click **Select a Chapter** and navigate the hierarchy to a chapter at the lowest level. Click **Save** to add this chapter to your membership or **Cancel** to close the dialog without saving.

Secondary/Tertiary Members Only

If your membership type supports secondary and/or tertiary members but not chapters, you will see a screen similar to the following.

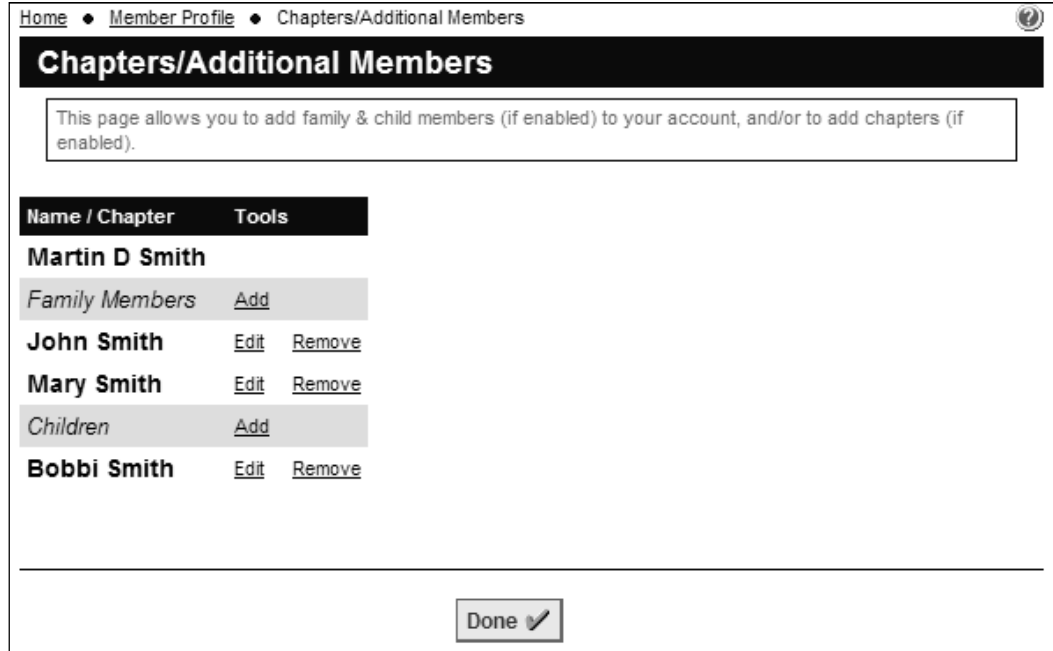


Figure 8.9 – Secondary and/or Tertiary Members

The first section below your name is for secondary members. It will use the keyword defined by your club or association for a secondary member who can log into the website. The second section below your name is for tertiary members and it will also use the keyword defined by your club or association.

The **Add** link is used to add a secondary and/or tertiary member. If this link is not present, your membership does not support additional memberships of this type. Clicking the link displays one of two screens:

Your club or association may decide to only collect a minimum of information on secondary and/or tertiary members, including name, date-of-birth, gender and email address. This option is more suited to clubs where members join through their personal lives and where tertiary members may be children.

https://democlub.clubexpress.com/?page_id=3...

Add Child

Specify the name and other information for this additional member attached to your account. Click "Save" to save your changes and return to the list of additional members, or "Cancel" to return without saving.

First Name

Last Name

Birthday

Gender Female Male

Figure 8.10 – Add Secondary and/or Tertiary Member – Simple Version

Alternatively, your club or association may decide to collect more complete information on secondary and/or tertiary members. This option is more suited to associations where members join through their business or professional lives.

https://democlub.clubexpress.com/?page_id=399&club...

Add Child

Specify the name and contact information for this additional member attached to your account. Click "Save" to save your changes and return to the list of additional members, or "Cancel" to return without saving.

Salutation [Select](#)

First Name

Last Name

Address

City

State/Province

Zip/Postal Code

Country [Show All Countries](#)

Email

Phone

Cell Phone

Company

Title

Birthday

Gender Female Male

Figure 8.11 – Add Secondary and/or Tertiary Member – Full Version

Click **Save** to save this new member, or **Cancel** to close the dialog without saving. After a secondary member is added, the system will show you the username and password assigned to that member. When the secondary member logs in, he or she can change this information.

Chapters and Secondary/Tertiary Members

If your club or association supports chapters AND your membership allows secondary and/or tertiary members, this screen may prompt for both types of information, as shown in the following example:

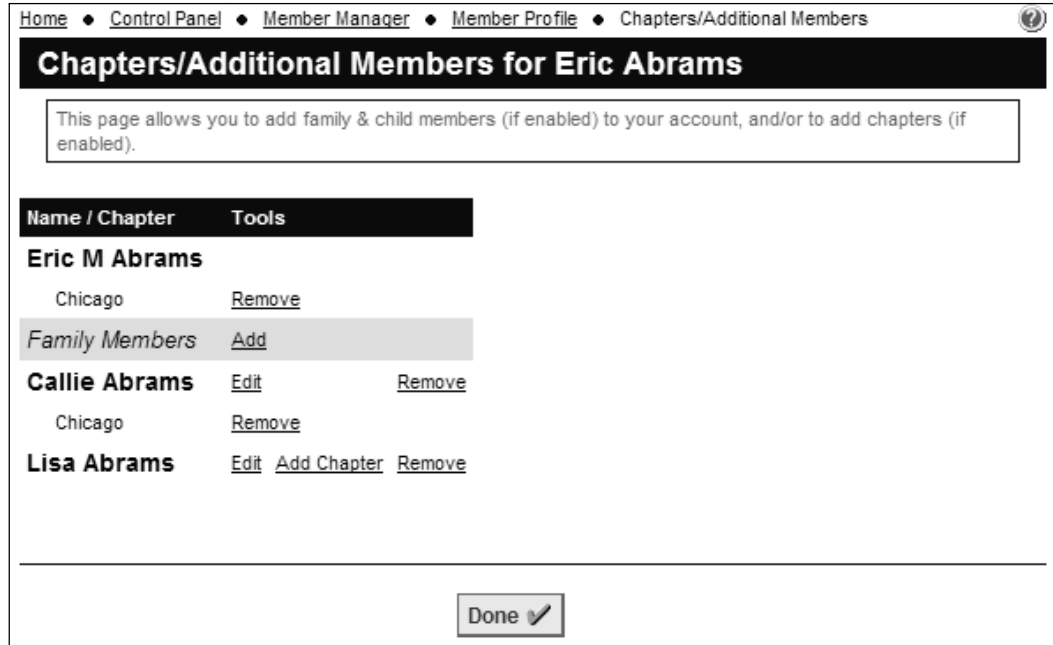


Figure 8.12 – Add Chapter(s) and Secondary/Tertiary Members

First enter the secondary and/or tertiary members. Then for each member including you, you can add or remove chapters.

USER NAME / PASSWORD

Click **User Name / Password** to update your login information. You will see the following screen:

Home • Member Profile • User Name and Password

User Name and Password

Some areas of our web site are only available to members. Your username and password allow you to log into the site to access these features. The name you choose must be unique within the club.

*User Name

*Password

*Re-enter Password

Passwords should be from 5 - 10 characters long and may only include letters, numbers and the underscore character.

Remember me on this computer

Figure 8.13 – User Name and Password

Because your password is encrypted by the system using a one-way algorithm (so that no-one, not even a ClubExpress customer support agent, can read it), there is no way to retrieve the current password. If you press **Cancel** to close this screen without making a change, your original password is retained. But if you want to change your user name, your password must be re-entered, even if it does not change.

Your User Name is made up of letters and numbers, and must be unique within your club. It is not case-sensitive.

Passwords should be between 5 and 10 characters long and may include any characters. The password is case-sensitive. It is important that you not share your password with anyone else.

Check the **Remember me on this computer** option so that you don't have to enter your user name and password each time. When you click Member Login, you will be logged in automatically. Uncheck this option to require a user name and password each time you log in. You should not use this option if more than one person uses this computer to login to this website, otherwise the other person will not be able to login under his or her account.

Click **Save** or **Cancel** to close this screen and return to the Member Profile.

INTERESTS

If your organization has enabled the Interests module, this choice will be shown on the menu. It allows you to register your affiliation or expertise in various club or association programs or topics of interest to members. When you click the **Interests** choice, you will see a screen similar to the following:

Home • Member Profile • Interests

Interests

Select the interests in which you would like to participate.

Maintenance

Maintaining and preparing balloons and associated equipment for the flying season

- Burners
Maintaining the gas burners, including storage tanks, pipes, jets, controls, gauges and other equipment
- Envelope
Maintaining and repairing the balloon envelope, including vents, lines and control surfaces
- Baskets
Maintaining baskets, including lines, safety harnesses, weights and other passenger elements
- Support Equipment
Everything but the basket, burner or envelope

Competition

Sweep Rowing

- Balloon races
We're interested in every aspect of balloon racing. We love to race and improve our skill at reading the weather, winds and terrain. We also foster competition with other clubs.

Figure 8.14 – Interests

Interests are organized into categories. Each interest has a checkbox and your current interests will be checked. In general, you can check or uncheck as many interests as you wish but clubs also have the option to limit how many interests can be checked within each category. To clear the slate and start over, click the **Uncheck All** link at the end of the list.

When you have finished, click **Save** or **Cancel** to return to the Member Profile screen.

Administrators can also configure this screen to be included as part of the Member Signup Wizard. Go to Control Panel – Membership Wizard Setup and check the appropriate boxes.

FORUM GENERAL PREFERENCES

If your club or association has enabled the discussion forums module, this choice is also shown on the menu. It allows you to control your interactions with discussion forums, including general viewing preferences, message authoring preferences, and screen name. When you click the **Forums** choice, you will see the following screen:

Home • [Member Profile](#) • Forum General Preferences

Forum General Preferences

Select your preferences which apply to all discussion forums. Some of these settings can also be set individually on each forum.

Viewing Messages and Threads

Threads Per Page

Preferred Thread Sort ▼

Preferred Message View Threaded Flat

Msgs Per Page (Threaded)

Msgs Per Page (Flat)

Preferred Message Sort ▼

Note that the message sort setting applies to the flat message view only

Email Address

Use Email Address Primary Contact Email (info@clubexpress.com)
 This Address ◆

Allow Private Replies Allow forum members to send replies directly to me via email

Check this box to apply the email address choice to all my forums

Message Delivery

Send Email Send Forum Messages To Me Via Email
NOTE: When this option is checked, you can control the sending of email for each forum individually from the "Forum Memberships" page. When un-checked, you will not receive emails from any of your forums, regardless of the individual settings.

Email Format Plain text in the body of the email
 Rich formatting in the body of the email

Frequency ▼

Check this box to apply these message delivery options to all my forums

Figure 8.15a – Forum General Preferences (top part)

The following options are available:

Viewing Messages and Threads

- **Threads Per Page** controls how many threads are shown in the initial list of threads when a forum is first opened. You can specify any number, but we recommend not going higher than about 100.
- **Preferred Thread Sort** controls how threads are sorted in this initial view. The options are by date, author and subject, either ascending or descending.
- When you click on a thread, **Preferred Message View** determines which detail view will initially be displayed. Threaded View shows the current message at the top, with the rest of the thread underneath, one line per message, with the indent level indicating the hierarchy of replies. Flat View expands all messages in the thread, without showing a hierarchy.
- **Messages Per Page (Threaded)** controls the number of messages shown on a single page in Threaded View. This number should normally be higher than messages per page in Flat View, since only the current message is fully expanded. You can specify any number but we recommend not going higher than about 100. Additional messages are viewed by navigating through pages.
- **Messages Per Page (Flat)** controls the number of messages shown on a single page in Flat View. This number should normally be lower than messages per page in Threaded View, since all messages are fully shown. You can specify any number but we recommend not going higher than 20. Additional messages are viewed by navigating through pages.
- **Preferred Message Sort** applies to Flat View only. It controls the initial sort order when a thread is displayed. The options are by date, author and subject, either ascending or descending.

Email Address

- **Use Email Address** is the email address that will be used for forums configured as email lists (“listserve” option). By default, this is your primary email address but you can change it to any address.
- The **Allow Private Replies** checkbox controls whether other forum members can send replies to you directly via email.
- The check box allows you to propagate this address into every forum that you’re subscribed to that requires an email address.

Message Delivery

- **Send Email** controls whether you want forums that normally send emails to actually do so. If this option is not checked on the General Preferences page, you will not receive emails from any of your forums, regardless of the individual settings.
- **Email Format** controls the format of such emails, either plain text or full HTML. If Send Email is unchecked, this section will be unavailable.
- **Frequency** controls how forums configured as email lists send messages to you. The options are:
 - Immediately – send messages individually and immediately;
 - Daily - Digest – send one message a day containing all messages;
 - Daily - Subjects – send one message a day containing subjects only; each message includes a link to view the complete email online.
- The check box allows you to propagate these settings into every forum that you've subscribed to that requires such configuration.

The description of Forum General Preferences screen continues below:

Authoring Messages

Preferred Text Editor Simple - Text Only Advanced - With Formatting Tools

Message Signature Attach the following signature to each message

200 characters max. Do not enter html text. Note that the signature is used only for messages created online, not posted via email.

Check this box to apply the signature settings to all my forums

Identification

Forum Handle ◆

Show Name Display my full name with my messages


Link to Bio Display a link to my directory listing (bio) with my messages

Show Location Display my location with my messages

Location: ◆

Local Time Offset The current server date & time is 7/10/2009 2:39 PM.
Specify your offset time in hours (+/-). ◆

Show Picture Display this picture with my messages



Select Picture

Check this box to apply these identification options to all my forums

Figure 8.15b – Forum General Preferences (bottom part)

Authoring Messages

- The default **Text Editor** is a simple, text only input field that is suitable for the majority of users. However, more experienced users can switch to an advanced editor which includes support for text formatting, fonts, colors, tables and other options. (This is the same editor used to create custom pages within ClubExpress; it is explained in Chapter 17.)

- If you want to attach a standard **Message Signature** to each message, check the box and specify the sig. in the field provided. This saves you from typing a standard set of characters at the end of each message. Forum users often include their name, location or a catchy phrase in a signature, although forum etiquette suggests that signatures should not be excessively long.

- The check box allows you to propagate these settings into every forum that you've subscribed to that requires such configuration.

Identification

- **Forum Handle** allows you to specify a name to use within forums. This does not need to be your login name, although this is the default choice. If you are known within your club for a particular area of expertise or interest, you might select a name which reflects that reputation.
- The **Show Name** checkbox controls whether your name is attached to messages in addition to your handle. If you wish to remain anonymous, uncheck this option. You can also specify a "different" name from the one under which your club membership is defined.
- The **Link to Bio** checkbox controls whether other users will see a link on your forum handle that jumps to your bio screen in the Membership Directory module.
- The **Show Location** checkbox controls whether your location is attached to messages. If you wish to keep this information confidential, uncheck this option. You can also specify a different city and state from the ones under which your club membership is defined.
- With the **Local Time** option correctly set, you will see when other messages were posted relative to your own location. (Our servers are located in the Central Time Zone, so messages are normally tagged with their date/time of posting based on this time.) For example, if you are located on the west coast, specify "-2" for this option. Then, when you are viewing a message posted on our servers at 10:45 AM CST, it will show 8:45 AM as your local time when the message was posted.
- If you want to display a small picture beside each message, check the **Show Picture** checkbox then specify a local file to upload. We recommend that this picture be no more than 80 x 80 pixels in size; you can use the same or a different picture from the one you uploaded with your directory entry.
- The check box allows you to propagate these settings into every forum that you've subscribed to that requires such configuration.

When you have finished configuring these options, click **Save** to save your changes and return to the Profile menu. If you want to return without saving changes, click **Cancel**.

FORUM MEMBERSHIPS

This option allows you to manage your subscriptions and preferences in forums that are available to all members or to members of an interest group or committee of which you may also be a member. Selecting this option displays a screen similar to the following:

The screenshot shows a web interface for 'Member Forums'. At the top, there are navigation links: Home, Member Profile, and Member Forums. Below this is a header 'Member Forums' and a text box explaining the page's function: 'This screen lists the forums that you are currently a member of. Click the Pause button to temporarily prevent receiving any forum emails. Click the Resume button when you want to start receiving forum emails again. Click the edit link if you would like to change your personal settings for a specific forum.' Below the text box is a status panel: 'Status: You are currently receiving emails, based on your forum settings.' with a 'Pause' button. The main content is a table with four columns: Forum, Message Delivery, Email, and Maintain. The table lists several forums with their respective settings and email addresses. At the bottom of the page is a 'Return to Previous Page' button.

Forum	Message Delivery	Email	Maintain
Board of Directors	Forum Does Not Send Emails	info@gembrook.com	Edit
Buy / Sell / Trade	Do not send emails	dan@clubexpress.com	Edit Remove
Day Trips	Forum Does Not Send Emails	msmith@balloons.com	Edit
Equipment	Forum Does Not Send Emails	msmith@balloons.com	Edit
Official Club Business	Forum Does Not Send Emails	msmith@balloons.com	Edit
Safety	Send Immediate Emails	msmith@balloons.com	Edit

Figure 8.16 – Forum Memberships

The **Status** panel allows you to temporarily unsubscribe and then re-subscribe to forums without losing your configuration settings. Click the **Pause** option when you are going on vacation or otherwise want to suspend receiving emails for a period of time. Click the **Resume** button to restore email delivery.

The main grid shows forums that allow you to participate in forum discussions. (This may not be the complete set of forums defined by the club.) Two types of forums are shown in the list:

1. If a forum is available for all members to opt-in, you can subscribe and unsubscribe from this forum. Click the **Join** link in the Maintain column to subscribe to the forum, or the **Remove** link to unsubscribe.
2. If the forum membership is “all members”, or is based on a committee, an interest group, or a member type, or is moderator-defined, you are a member of the forum through an external setting. You cannot unsubscribe from such a forum but you can suspend email delivery for such a forum so that you are effectively not participating.

Click the **Edit** link to modify settings for an individual forum. You will see a screen similar to the following:

Home • Member Profile • Member Forums • Forum Preferences

Forum Preferences for Engine maintenance

Select the message delivery and message authoring options you prefer to use in conjunction with this forum. Click 'Reset to Default' to use your forum general preferences. Click 'Save' when finished.

Email Address

Use Email Address Primary Contact Email (info@clubexpress.com)
 Forum Default Email (info@gembrook.com)
 This Address

Allow Private Replies Allow forum members to send replies directly to me via email

Message Delivery

Send Email Send Forum Messages To Me Via Email

Email Format Plain text in the body of the email
 Rich formatting in the body of the email

Frequency

Authoring Messages

Forum Handle

Message Signature Attach the following signature to each message

200 characters max. Do not enter html text. Note that the signature is used only for messages created online, not posted via email.

Identification

Show Name Display my name with my messages

Link to Bio Display a link to my directory listing (bio) with my messages

Show Location Display my location with my messages

Show Picture Display my picture with my messages

Figure 8.17 – My Preferences for a Forum

Many options on this screen match choices on the general preferences screen, so they won't be repeated here. Some choices may or may not be displayed, depending on whether that forum supports email posting and/or delivery.

Use Email Address allows you to control the email to which forum messages are sent on a forum-by-forum basis. You can use your primary email, the forum's general default, or a completely different email address just for this forum.

Click **Save** to save your changes and return to the Profile menu. If you want to return without saving changes, click **Cancel**.

PHOTO PAGES

If your club or association has enabled member-level photo pages, the **Photo Pages** choice will be visible. This option allows you to create website pages and upload hi-res digital photos into them. A club administrator can also place these photos on club-level photo pages.

When you select this option, you will see a screen similar to the following:

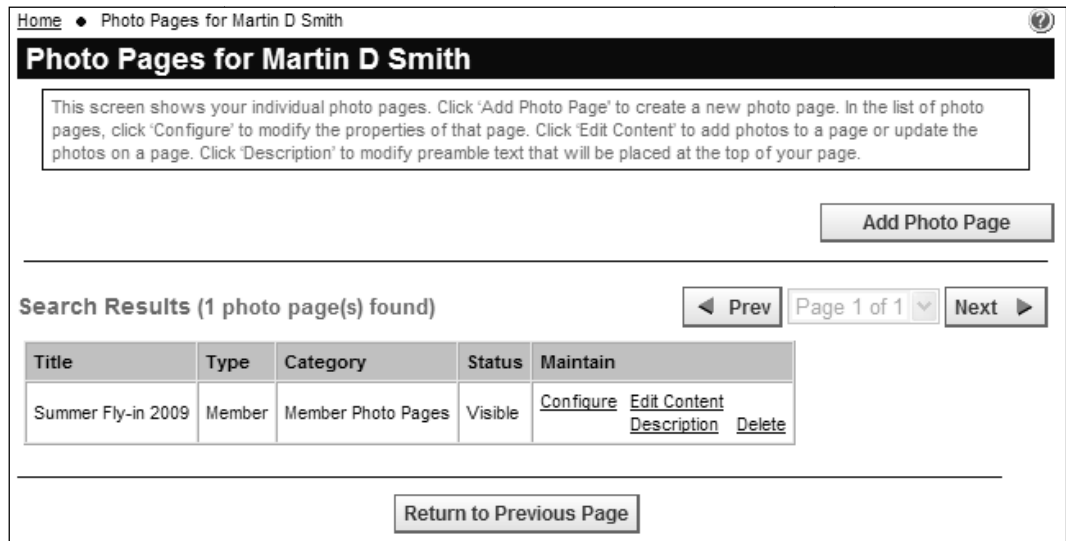


Figure 8.18 – Member Photo Pages

The grid shows photo pages that you have created, perhaps built around a specific event or project. The grid shows the title and status for each photo page. The following options are available:

Add Photo Page

Click the **Add Photo Page** button to create a new photo page. You will see the following popup dialog:

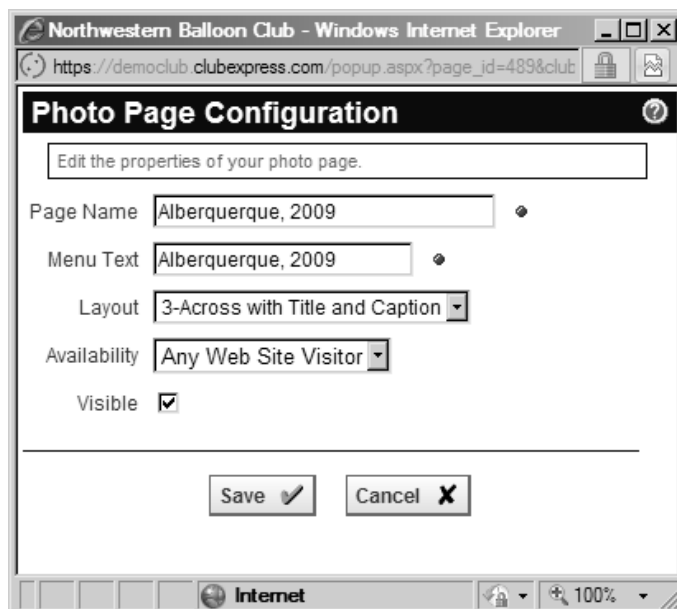


Figure 8.19 – Add/Edit Photo Page

Specify the page name and text that can be used if the page is placed on the menu (which is often shorter.) You can also choose from among nine layouts, in any combination of the following:

- 1, 2 or 3 photos across;
- Each photo with both title and caption, title only, or neither.

You can also specify whether the page will be available to all website visitors or whether it should only be visible to members. The page is initially hidden, to allow you to add photos and introductory text to it; when you are ready, click back to this screen using the **Configure** link to make the page visible.

Click **Save** or **Cancel** to return to the Photo Page Administration screen.

Configure

Once a photo page is defined, click this link to modify the page's configuration. The same form described above will be displayed.

Edit Content

Click this link to manage the introductory text and photos on the page. This screen is discussed in detail below.

Description

This button displays the ClubExpress content editor, allowing you to create preamble text that is displayed at the top of the photo page. With this editor, you have full control over fonts, alignment, styles and other powerful HTML options; you can even add photos and other graphics.

See Chapter 16 on the content editor for more information.

Delete

Click this link to delete the page. The photos on the page are not deleted; they remain available to be placed on other pages. You will be prompted to confirm this action.

EDITING PHOTO PAGE CONTENT

When you click **Edit Content** you will see a page similar to the following:

Photo	Title	Maintain
	It's Alive!	Edit Remove
	Sunset Ride	Edit Remove
	Kissing Cousins	Edit Remove

Figure 8.20 – Edit Photo Page Content

This screen shows the photos uploaded to the page. For each photo, the following options are available:

- Select **Edit** to modify the properties of a photo, including title, caption, photographer, date, etc.
- Select **Remove** to remove the photo from the page. It is not deleted from the system; instead, it can be placed on another page.

The following buttons are available:

Select Photos

Click this button to add photos to the page that have already been uploaded. You will see a dialog similar to the following:



Figure 8.21 – Select Photos

Enter one or two tags and click the **Show Photos** button to display a list of photos with these tags. You can also select tags from the master tag list. As you click on a photo, a preview is shown in the right panel. You can also *[Shift-Click]* and *[Ctrl-Click]* to select multiple photos at a time, but the preview panel will only show the first selected photo in the list.

Click the **Select** button to add the selected photo(s) to the page, or **Cancel** to close the dialog without adding photos.

Add Multiple Photos

Select this option to upload multiple photos and place them all on your page. You will see the following dialog:

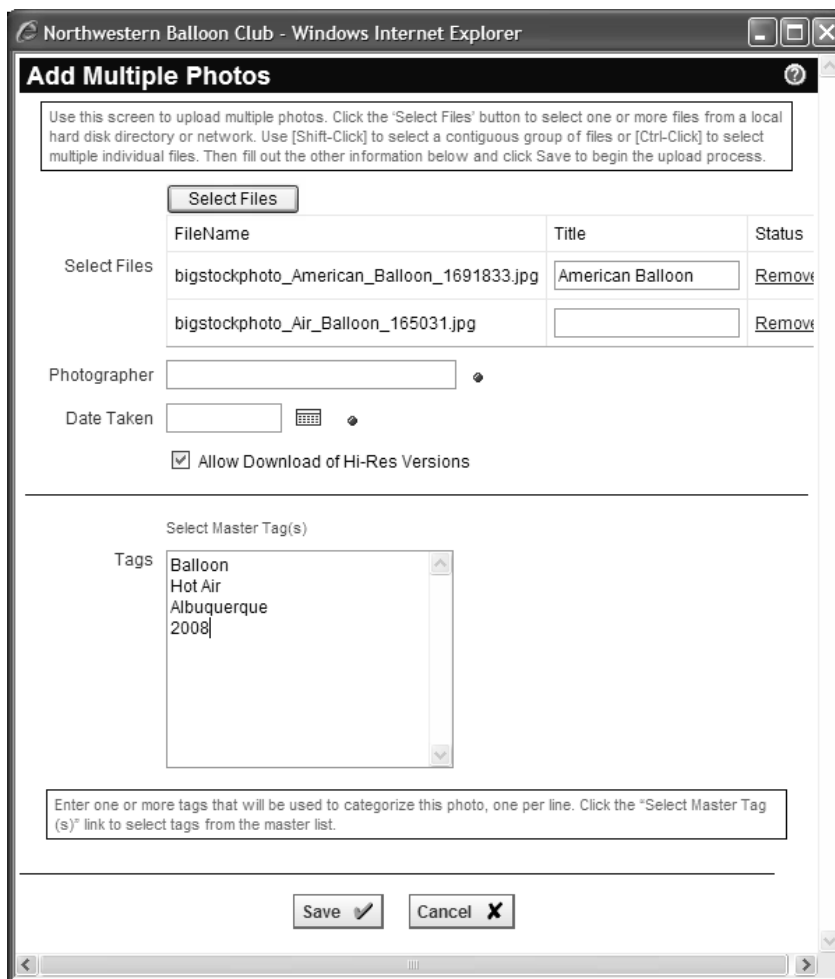


Figure 8.22 – Add Multiple Photos

Click the **Select Files** button to display a standard File Open dialog. Navigate to the folder containing the photos you want to upload. Click the first photo then use *[Shift-Click]* to select a contiguous set of photos or *[Ctrl-Click]* to select discontinuous photos. You can only upload photos from one folder at a time.

When you click the **Open** button you will see a list of selected photos. If you see photos in the list that you don't want to upload, click the red x icon to remove them from the list.

You can specify a title, caption, photographer, date taken, and tags that will be applied to all photos. Once they have been uploaded, you might want to edit each photo to individualize the titles and captions.

When you click **Save**, all of the photos will be uploaded to the website and placed on your page. Click **Cancel** to close the dialog without uploading.

Important Note: Only upload photos that you have the right to upload (i.e. you hold the copyright or the copyright holder has granted permission for the photo to be uploaded.) If you upload photos without permission of the copyright holder, you run the risk of being sued for unauthorized use of copyrighted material.

Add One Photo

Select this option to upload a single photo and place it on the page. You will see the following dialog:

Figure 8.23 – Add Photo

Click the **Browse** button to browse to a photo on your local hard disk. You can also specify a title, caption, photographer, date taken, and one or more descriptive tags.

Tags are used to index and reference photos. Enter tags into the text box, one per line. Your club has also created “master” tags that may be appropriate for

your photo. Click **Select Master Tags** to add one or more of these tags to your photo.

Click **Save** to upload your photo or **Cancel** to close the dialog without saving.

When the photo is uploaded, the system checks its size. Large photos are saved in three resolutions:

- Original resolution, uncompressed
- Screen size (longest dimension is 450 pixels)
- Thumbnail size (longest dimension is 120 pixels)

Photos that are smaller than the screen size are only saved in two resolutions.

If you don't want visitors to your photo page to be able to download an original high-resolution copy of the image, uncheck the **Allow Hi-Res Download** box. A "Download Hi-Res" link will not be displayed. (Note that users can still right click the lo-res screen size version and save it. There's no way to stop this.)

Display Sequence

This button shows the standard ClubExpress sequence dialog, allowing you to reorder the photos on the page.

Configure Page

Click the **Configure Page** button to modify the page title, menu text, format and visibility. You will see the Photo Page Configuration dialog described above.

Page Description

Click the **Page Description** button to modify the preamble text placed at the top of the page. You will see the advanced content editor dialog.

TRANSACTION HISTORY

This option allows you to view the transactions you have made through your club's website. When you select **Transaction History**, a screen similar to the following is displayed.

Home • Control Panel • Member Manager • Member Profile • Transaction History			
Transaction History for Michael Droz			
This screen lists the on-line transactions done by this member, including membership dues and event registrations.			
▼ Date	Transaction Type	Amount	Status
▼ 10/12/2007	Event Registration	\$ 120.00	Not Paid
	Balance Due \$ 120.00		
	10/20/2007 - Buckeys Vs. Michigan State		
▼ 4/12/2007	Event Registration	\$ 50.00	Paid in Full
	5/27/2007 - Winter Wonderland		
▼ 3/23/2007	Sign Up	\$ 32.00	Paid in Full
	Transaction Total	\$ 202.00	
	Payment Total	\$ 82.00	
	Balance Due Total	\$ 120.00	
<input type="button" value="Return to Previous Page"/>			

Figure 8.24 – Transaction History


This screen shows all transactions done through the system with your club or association, in descending date order.

To view the details of one transaction, click the double down-arrow symbol ▼ beside the date. You will see a display similar to the following:

⤴ 4/12/2007	Event Registration	Print	\$ 50.00	Paid in Full
	5/27/2007 - Winter Wonderland			
Item(s):		Michael Droz - Meeting	\$ 10.00	
		Michael Droz - Dinner/Dance	\$ 40.00	
Payment(s):		4/12/2007 Credit card	\$ 50.00	
Note: the total payment was \$ 82.00 - the amount applied to this transaction was \$ 50.00				
Payment Receipt				

Figure 8.25 – Transaction History showing expanded details

You will see the individual line item(s) making up the transaction, and the individual payment(s) used to complete this transaction. Click the blue *Print* link to display a printable receipt for this transaction in a separate window.

To close the detail display, click the double up-arrow symbol  beside the date. You can also click the double arrow symbol at the top of the list to open and close all items at once.

Administrator Options

Administrators will see a Cancel link beside membership and miscellaneous transactions. (For now, event registrations and donations are handled from their respective modules.)

- Transactions that were paid through ClubExpress (credit cards and checks sent to us) can only be cancelled, not deleted. A credit will be added to the member's account.
- Transactions that were paid directly to the club (check, cash, etc.) or that were comp'ed or written off can be canceled or deleted.
- Unpaid transactions can only be deleted.

These new options are especially useful for cleaning up the transactions and payments that you did in Trial mode, to leave the transaction and payment histories as "clean" as possible. Note that deleted transactions cannot be recovered; they are gone. And cancelled transactions cannot be "un-cancelled".

When you have finished, click **Return to Previous Page** to return to the Member Profile menu.

PAYMENT/CREDIT HISTORY

This option allows you to view the payments you have made through your club's website. When you select **Payment/Credit History**, a screen similar to the following is displayed.

Home • Control Panel • Member Manager • Member Profile • Payment/Credit History					
Payment/Credit History for Sara A Ballard					
This screen lists the payments made by this member, including membership dues and event registrations.					
Payments					
Date	Payment Type	Amount	Receipt	Maintain	
12/17/2007	Cash (to club)	\$ 30.00	Receipt	Edit	Delete
11/28/2007	Cash (to club)	\$ 21.36	Receipt	Edit	Delete
Payments Total		\$ 51.36			
Credits					
Date	Credit For	Status	Amount	Balance	
3/31/2008	Volunteering at new-member orientation	Available	\$ 20.00	\$ 20.00	
Credits Total			\$ 20.00	\$ 20.00	
Return to Previous Page					

Figure 8.26 – Payment History

In the upper panel, you will see the date, type and amount of each payment made to the club, whether through the system, by mail, or at an event. Click the [Receipt](#) link to display a popup receipt for the payment.

In the lower panel, you will see the date, reason, status and amount of each credit applied by the club to your account.

Administrator Options

Administrators have additional options on this screen. In the Payments section, click the Edit link to modify payment details. You will see a screen similar to the following:

The screenshot shows a web browser window titled "Northwestern Balloon Club - Windows Internet Explorer". The main content area is titled "Edit Payment". It contains a form with the following fields:

- Payment From:** Sara A Ballard
- Amount:** \$ 30.00
- Payment Type:** Cash Received By Club (dropdown menu)
- Date:** 12/17/2007 (calendar icon)
- Notes:** (text area)
- Buttons:** Save, Cancel

Figure 8.27 – Edit Payment

You cannot change the amount of the payment, since that would impact transactions marked as paid by this payment (and possibly, credits as well.) You can change the payment method if ClubExpress did not handle the funds on your behalf (credit card or check paid to and sent to ClubExpress); you can also change the date of payment and notes.

Click **Save** to save your changes and return to the Payment/Credit History screen, or **Cancel** to return without saving.

Click the Delete link to delete the payment. Affected transactions will be marked as paid or partially paid as appropriate. This feature works whether the payment covered a single transaction or multiple transactions; and whether or not a credit was involved (the credit amount is restored to being available.)

- An event registration will no longer be considered 'Paid'
- A donation will no longer be considered 'Paid'
- New members will no longer be 'Active' – they will revert to 'Pending'
- A membership renewal will be reversed
- A miscellaneous charge will no longer be considered 'Paid'

For all but a membership renewal, click the **Delete Payment** button to confirm the action. For a membership renewal, you must specify the new membership type, expiration date and status (Active or Expired.)

In the Credits section, click the Edit link beside an open credit to display the following dialog:

The screenshot shows a web browser window titled "Northwestern Balloon Club - Windows Internet E...". The main content area is a dialog box titled "Edit Credit". Inside the dialog, there is a summary box at the top with the following text: "Credit Issued To: Sara A Ballard", "Status: Available", "Amount \$ 20.00", and "Balance \$ 20.00". Below this, there are several form fields: "Select Action" is a dropdown menu currently showing "Edit"; "Date" is a text box with "3/31/2008" and a calendar icon; "Amount \$" is a text box with "20.00"; "Credit Type" is a dropdown menu showing "For Services"; "Description" is a text area containing "Volunteering at new-member orientation"; and "Account" is a dropdown menu showing "Master Membership Dues". At the bottom of the dialog are two buttons: "Save" with a checkmark icon and "Cancel" with an 'X' icon.

Figure 8.28 – Edit Credit

This dialog allows you to adjust the credit in different ways, including its disposition. There are four available actions:

- **Edit** – change the various properties of the credit.
- **Refund** – mark the remaining balance of the credit as having been refunded to the member. Note that no credit is actually issued by ClubExpress; the actual refund must be handled by the club's treasurer.
- **Waive** – this option marks the remaining balance of the credit as waived, which means that the member has elected not to use it.
- **Cancel** – if no part of the credit has been applied, this option deletes it. If the credit has been partially applied, the amount will be changed to the applied amount, canceling the remaining balance.

Click **Save** to save your changes and return to the Payments/Credits screen, or **Cancel** to return without saving.

When you have finished, click **Return to Previous Page** to return to the Member Profile menu.

CREDIT CARD

Click **Credit Card** to maintain the credit card you use to renew your membership and register for events. You will see the following screen:

Home • Member Profile • Edit Credit Card

Edit Credit Card Information

Use this page to maintain your credit card information.

Your credit card is presently stored in our database. If you wish to remove it, press the "Remove" button to the right.

Credit Card Type:

Card Number:

Expiration:

Name on Card:

Validation Code: How do I find this?

Is the address for this credit card different from your residential address? Yes No

Figure 8.29 – Credit Card Information

ClubExpress allows you to store a credit card in the system, so that you don't need to re-enter it each time it's needed. This is optional; if you don't store it, you can still pay with a credit card by entering the details when prompted. If you choose to store your credit card, you can be reassured that it is maintained in an encrypted database that cannot be read except by the software and then, only under program control. All credit card transactions are conducted in secure sessions, to provide an additional level of protection.

If there is no credit card stored, the top section including the **Remove** button is not shown. Instead, you can enter the credit card information and click **Save** to save your information, or **Cancel** to return to the Profile screen without saving.

If the credit card address is different from the Primary Address stored in your account, click **Yes** for the question at the bottom of the page; a new panel will be displayed, allowing you to enter the address information.

If a credit card is already stored, click the **Remove** button to remove it. There is no confirmation of this step.

It is important to note that when you pay a pending transaction by credit card, the charge on your monthly statement will read "ClubExpress" unless your club or association has established its own merchant account.

Automated Payments

ClubExpress includes an option to allow memberships to be renewed and paid automatically. When this option is enabled by a club or association, and when you select a member type which is configured for automatic renewal and payment, you will not receive a renewal notice and you do not need to login to renew; the system will renew you based on the duration of the chosen member type (every month, every quarter, every year, etc.) and will charge your saved credit card automatically.

If you select a member type that is configured for automatic renewal and payment, you will see a special note on the summary page, before you save your membership and proceed to the payment page.

When this option is enabled, the system requires that your credit card be saved and you will not have the ability to remove it. You will still see this screen so that you can change the card or update it (for example, to modify the expiration date or validation code when a new card is issued.) However, the **Remove** option will not be shown.

To stop the automatic charging you must cancel your membership, effectively resigning from the club. To do so, click the **Cancel My Membership** button on your Member Profile screen.

When clubs and associations use this option, we require them to have their own merchant account. So transactions will appear on your monthly statement using the name of your club or association.

EVENT HISTORY

Select this option to view a history of all events you have attended. You will see a screen similar to the following:


Home • Member Profile • Event History

Event History

This screen lists the events that you have registered for. If you registered companions they will appear here as well.

Event	Date	Amount	Status	Attendance
Board Meeting	11/18/2008	0.00	Paid	Not Recorded
Fall Balloon Rally	11/13/2008	5.00	Canceled	Not Recorded
Fall Balloon Rally	11/13/2008	5.00	Paid	Not Recorded
Mardi Gras	8/21/2008	1.00	Paid	Not Recorded
Monthly Luncheon	9/4/2008 Print	59.00	Paid	Not Recorded
When: Thursday, Sep 4, 2008, 11:30 AM until 1:30 PM Where: Manny's Restaurant 5005 Newport Drive, cnr Algonquin Road. Rolling Meadows, IL Registered On 8/5/2008 Companions Mark Smith				
Pizza Party	7/31/2008	10.00	Paid	Not Recorded

Figure 8.30 – Event History

Click the double-down arrow symbol  to display details of that event. You can also click this symbol in the header to display details for all events. Click the blue *Print* link to print the details for each event.

Cancellations

If the event was configured to allow cancellations, and if the cancel deadline has not passed, you will see a [Cancel](#) link to the right of the attendance column. Clicking it allows you to cancel your registration for this event.

If the event was free, or if the fee had not yet been paid, clicking the [Cancel](#) option simply marks your registration as “Canceled”. If you had paid a fee to attend the event, a credit is also issued to your account for the amount paid, minus any cancellation penalty that the club or association may have imposed. This credit can be used against any future charges.

ClubExpress does not issue refunds, although your club or association may choose to convert the open credit into a refund. Contact them if this is what you want.

OPTIONAL ADDITIONAL CHARGES

Select this option to process additional charges at any time during the year (instead of just at signup and renewal times.) You will see a screen similar to the following:

Home • Member Profile • Additional Charges

Additional Charges

This screen allows you to purchase additional charges and membership options. Some charges may allow you to change the default fee or quantity.

Additional Charge Item	Quantity	Price	Total Price
<input type="checkbox"/> Club Sweatshirt Cotton fleece blue sweat; L only.	N/A	30.00	
<input checked="" type="checkbox"/> Student Supplies Packet Includes writing paper, pencils, color pencils, erasers, ruler, sketch pad, shape template, pencil case, etc.	N/A	50.00	50.00
Total Additional Charges			\$ 50.00

Figure 8.31 – Optional Additional Charges

Select one or more charges. Some charges may give you the option of adjusting price (for example, for a donation) or quantity. The Total at the bottom will update automatically. Click the **Proceed to Payment** button to complete your selection and jump to the payment page. Complete payment as normal.

BAD EMAIL ADDRESS(ES)

Membership Summary	
Type: Couple	Join Date: 3/22/2004
Status: Active	Last Renewal: N/A
Exp. Date: 9/30/2007 Payment Due	
NOTE: You have one or more invalid email addresses. Click here to correct them.	

Figure 8.32 – Bad Email Notification

If you see the above message in the Membership Summary panel, you have one or more bad email addresses. Click the link to see a screen similar to the following:

Home • Member Profile • Bad Emails

Bad Emails

One or more of your email addresses is not receiving emails from Northwestern Balloon Club. Use this page to change or correct the email address(es). The following reasons could be the cause of the problem:

- Invalid Format - the email address is not correctly formatted
- Bad Email - the email address does not exist
- Blocked - deliveries to the email address are blocked by an anti-spam filter
- "Soft" Failure - temporary problem such as the mailbox being full or the mail server being temporarily offline

You have several options for fixing these problems:

- Change the email address
- Reactivate the email address if you believe it will now be able to receive messages (not available if the error is "Invalid Format")
- Drop the bad email notification if you no longer use this address - note that this option removes only the notification; if you still have the email entered in your contact information or forum preferences, it will not be removed and may be used again to try to send messages to you.
- Ignore the error for now - you can come back and correct it later

Email Address	Problem	Disposition
wenwerwer	Invalid Format	<input type="radio"/> Change to: <input type="text"/> <input type="radio"/> Reactivate address <input type="radio"/> Drop it - I no longer use this address <input type="radio"/> Ignore error - do not fix

Figure 8.33 – Handling bad email address(es)

ClubExpress allows you to store multiple email addresses, a primary address listed with your account and one or more additional addresses for each discussion forum in which you participate. The above screen may list more than one email address if there have been multiple failures.

If one or more of these addresses have had a delivery failure, it will be listed in this screen, together with one of the following error messages:

Invalid Format – the email address is not correctly formatted. It might have invalid characters or one or more spaces.

Bad Email – the email address does not exist, as reported by the destination server.

Blocked – deliveries to the email address are blocked by an anti-spam filter. This could be on your email server or a blacklist in your email-handling program (e.g. Outlook, Lotus Notes, etc.)

“Soft” Failure – this is a temporary problem, such as the mailbox being full or the email server being temporarily offline.

Select the appropriate action from the choices in the right-most column:

Change to – modify the email address to one that should be valid.

Reactivate – if you believe the email address is valid and can now receive emails. (Not available if the error is “Invalid Format”.)

Drop It – select this option if you no longer use this email address. This option removes the notification but does not remove the email address from your profile. If it’s used again to send emails to you, it may appear again in this list.

Ignore Error – do not fix for now. This is the default choice if you don’t take any action. The error will continue to appear in this list.

Click **Save** to save your choices and return to the Profile screen, or **Cancel** to return without saving.

Reports and Exports

There is an administrator report that lists members in the database with a bad email address. There is also a data export with the same information. Use this information to notify members when they must correct an email problem.

Chapter 9 – Control Panels & Standard Dialogs

When a club or association administrator logs into the website, the system places a special choice at the end of the menu (or along the top edge of the screen, depending on the template you are using): **Control Panel**. Clicking this choice displays a screen similar to the following:

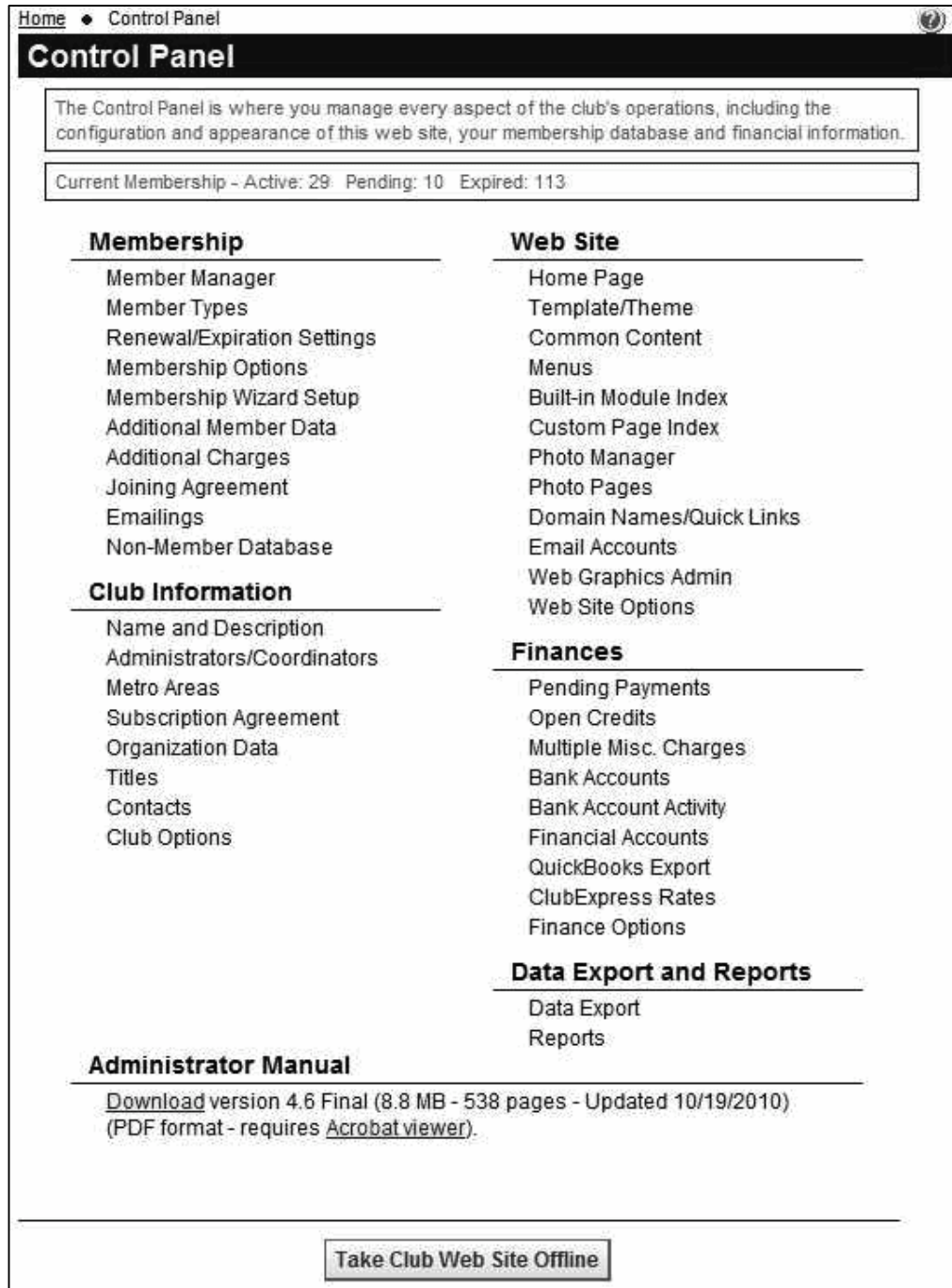


Figure 9.1 – Control Panel

The Control Panel is where an administrator manages every aspect of the organization's operations. Choices are organized into logical categories to help you find things easily.

At the top of the Control Panel is a membership summary, showing how many active, pending and expired members in the database.

Membership (See Chapter 10)

Member Manager	Search for members, update information on existing members, add new members, change membership status, and process payments.
Member Types	Define membership types and properties, including fees, duration, and visibility.
Renewal/Expiration Settings	Define the membership renewal cycle, renewal notices sent by ClubExpress and how expirations are handled.
Membership Options	Configure other membership options, including board approval and whether certain types of information are available for members to enter.
Membership Wizard Setup	Configure which screens should be shown in the new member signup and membership renewal wizards.
Additional Member Data	Define additional questions that are asked of members and which member types should see each question.
Additional Charges	Define optional items that are presented to members when they sign up or renew online.
Joining Agreement	Define a code of conduct or waiver / release of liability that new members must "sign" in order to join.
Emailings	Write and send emails to members and the mailing list.
Non-Member Database	Maintain a separate mailing list of non-member contacts.
Download Bio Photos	If the option to upload hi-res bio photos is enabled, this option will download these photos in a ZIP file.

Club Information (See Chapter 11)

Name and Description	Update basic information about your club or association.
Administrators/Coordinators	Maintain the list of administrators (who manage everything) and coordinators (who manage only some things.)
Metro Areas	For regional or national clubs, define metro areas in which events are held.
Subscription Agreement	Review your agreement with ClubExpress under which the website and database are maintained.
Organization Data	Configure chapters and, optionally, the regions and districts into which they are organized.
Titles	Define the titles used by your organization for committees and official contacts.
Contacts	Define your club's official contacts, including the names shown on the Contact Us module.
Club Options	Define options that apply to the whole club.

Website (See Chapter 12)

Home Page	Jump to the Home Page in Edit Mode, in order to make changes.
Template / Theme	Select a different layout and color scheme for the website as a whole.
Common Content	Update the page header and any content boxes defined for your template (e.g. the space under a vertical menu.)
Menus	Add or remove choices from the public or members-only menus.
Built-in Module Index	Select and configure which ClubExpress built-in modules will be available on your website.
Custom Page Index	Maintain the list of custom web pages which add static content to your website.

Photo Manager	Manage photos uploaded to the website and the libraries into which they are organized.
Photo Pages	Maintain the list of photo pages which are used to display photos uploaded to the website.
Domain Names/Quick Links	Maintain the list of domain names used to access this website. Also define quick links to jump to specific pages in the site.
Email Accounts	Manage email accounts associated with your club domain names, such as a general “info” account or the “president@” account.
Web Graphics Admin	Manage graphics and images used on the website itself (separate from photos used on photo pages.)
Website Options	Configure options that relate to the website.

Finances (See Chapter 13)

Pending Payments	Process check payments that arrive in the mail, or cash received at an event.
Open Credits	View, add and edit credits that have not been fully allocated.
Multiple Misc. Charges	Enter a misc. charge for multiple members at once.
Bank Accounts	Maintain the list of bank accounts used by your club or association.
Bank Account Activity	View club-level transactions initiated by ClubExpress against your bank accounts and display reports to reconcile these transactions against bank statements.
Financial Accounts	Maintain the list of financial accounts, which are used for reporting and also for connecting transactions to bank accounts.
QuickBooks Export	View QuickBooks exports and create new exports of transactions, payments, credits and fees. (Note that this option will only appear if you have enabled QuickBooks.)

ClubExpress Rates	View the ClubExpress rates configured for your club.
Finance Options	Configure options that relate to finances, including support for QuickBooks.

Data Export and Reports (See Chapter 14)

Data Export	Export membership and other data to local files suitable for importing into a spreadsheet or database table.
Reports	View reports on every aspect of club operations.

ADMINISTRATOR MANUAL(S)

Downloads the manual you are currently reading. This is an Adobe Acrobat (PDF) file. Most recent computers come with a viewer, but if you don't have one, click the Acrobat Viewer link to download a free viewer from Adobe.

If your ClubExpress website includes extensive customized features, you may also see a link to a separate manual describing these features.

WEBSITE STATUS

Click the **Take Club Website Offline** button at the bottom of the page to bring the site down for maintenance. Once this is done, users will see the Login page when they surf to the site, but only administrators will be allowed to log in. Click the **Activate Club Website** button to bring the site back online.

CONTROL PANEL COORDINATORS

Members who have coordinator rights will also see a **Control Panel** link at the bottom of the menu. Clicking it displays a screen similar to the following (actual choices will vary based on the coordinator functions assigned):

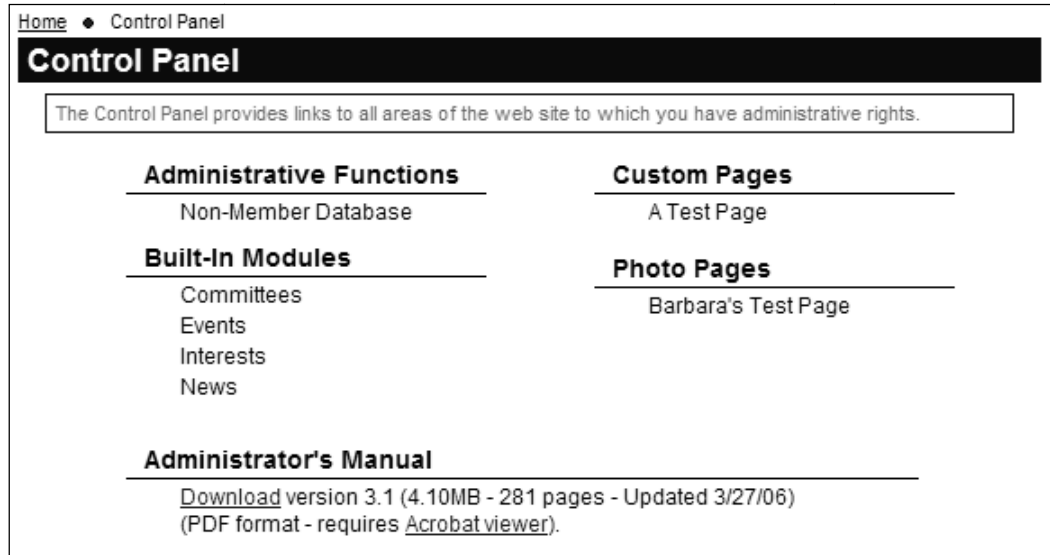


Figure 9.2 – Coordinator Control Panel

This screen provides shortcuts to the modules, custom pages, photo pages and administrative functions assigned to this member.

Coordinators may also have the ability to create their own Custom Pages and Photo Pages. If these rights are available, [Add Custom Page](#) and [Add Photo Page](#) links will appear under their respective headings. Clicking these links allows the user to add a page; he or she is automatically defined as a coordinator of the new page.

SUBGROUP ADMINISTRATORS



If your club or association has chapters, districts and regions, you can define administrators who have access to some Control Panel functions that pertain to their subgroup only. When subgroup administrators click the **Control Panel** option, they see the following screen:

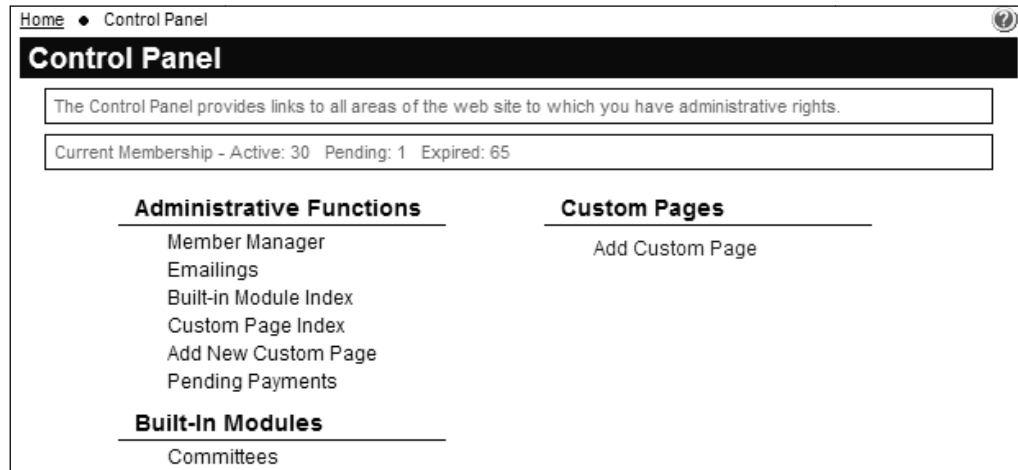


Figure 9.3 – Control Panel for Subgroup Administrators

Administrative Functions

Member Manager	Just for the subgroup(s) that this member is administering, search for members, update information on existing members, add new members, change membership status, and process payments.
Emailings	Write and send emails to members and the mailing list in the subgroup(s) that this member is administering.
Built-in Module Index	Manage coordinators for the modules that can be filtered by subgroup.
Custom Page Index	Define custom web pages that are assigned to a specific subgroup.
Add New Custom Page	Add a new custom web page.
Pending Payments	Process check payments that arrive in the mail, or cash received at an event. Only payments for subgroup members and non-members will be shown.

Open Credits	View, add and edit credits which have not been fully allocated
Bank Account Activity	View club-level transactions initiated by ClubExpress against your bank accounts and display reports to reconcile these transactions against bank statements.

Custom Pages

Add Custom Page	Add a new custom web page.
-----------------	----------------------------

Built-in Modules

Committees	Manage committees assigned to the subgroup(s) that this member is administering.
Documents	Manage document categories and the documents within them, for the subgroup(s) that this member is administering.
Discussion Forums	Manage forums for the subgroup(s) that this member is administering.
Event Calendar	Manage events for the subgroup(s) that this member is administering.

This screen may also list individual custom web pages and photo pages that the subgroup administrator has rights to edit.

STANDARD DIALOGS

ClubExpress includes a few standard administrator dialogs that appear in multiple locations:

- Display Sequencer
- Member Selector
- Subgroup (Level) Selector

Display Sequencer

Many lists can be sequenced in a user-defined order by clicking the **Display Sequence** button. A dialog similar to the following will be displayed:

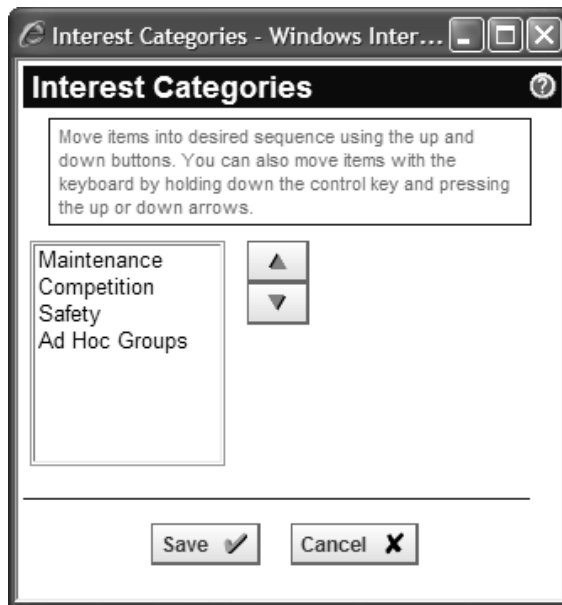


Figure 9.4 – Display Sequencer

To change the display sequence, select an option, then click the Up and Down arrow buttons to move the selection up or down. You can also type *[Ctrl-Up]* and *[Ctrl-Down]* on the keyboard to quickly move the highlighted choice up or down.

The display sequencer also supports *[Shift]-click* to select a contiguous block of items, and *[Ctrl]-click* to select multiple discrete items. When you move the selected items up or down, they are all moved at once.

Member Selector

There are places in the system where you need to select a member from among the available members (Active and Bulk Loaded only.) When you click the **Select Member** link, the following dialog is displayed:

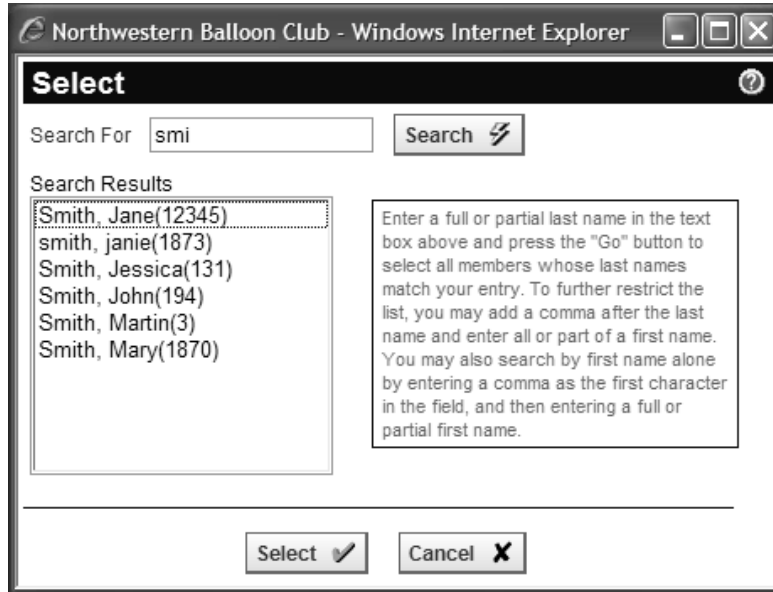


Figure 9.5 – Member Selector

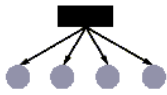
Enter the first few letters of the member’s last name and click **Search** (or just press the *[Enter]* key.) Members with matching last names will be displayed.

To further restrict the search, you can add a comma after the last name and enter all or part of a first name. You can also search by first name alone by entering the comma as the first character then entering a full or partial first name.

Highlight one and click **Select**, or click **Cancel** to close the dialog without making a selection. You can also double-click the mouse on a member’s name and the system will select it and close the dialog in one step.

The member selector generally only shows Active members but in certain places within the system, it may also show Bulk Loaded, Pending, Prospective and even Expired members, depending on the situation.

Subgroup (Level) Selector



For clubs and associations with subgroups a level selector is displayed in various places in the system. For example, when you define coordinators for a module that supports subgroups, you can specify to which subgroup the coordinator has rights.



Figure 9.6 – Specifying Coordinator Access Rights

In this example, Jessica Smith is being defined as an event calendar coordinator for all events in the Northeast region, including all of its districts and chapters.

Chapter 10 – Control Panel – Membership

MEMBER MANAGER

Click this choice to view and update the membership database, including information on individual members. The following screen is displayed:

Home • Control Panel • Member Manager

Member Manager

This module allows a club administrator to add a new member (perhaps someone who joined by mail or at a club event) or update information on current members. Use the "Search For Members" panel to search for an individual member. If you click the "Search" button without specifying a value, all members will be displayed. If there are more than 30 matching items, use the Paging controls to see additional pages.

Click the "Profile" link to update a member's information or the "Bio" link for a quick view of all member information. Click the "Status" link to change the status of a member. If "Renew" appears by the member's name, click this link to jump directly into the Renew Member wizard.

Search For Members

Search By Last Name First Name City State Member Number
 Company Name Email Address Phone Outside USA only

Search For

Advanced Options

Org. Group
Selecting a group will display all members at and below the selected level

Member Status All (except Dropped) Active Pending Trial
 Prospective Expired Frozen Bulk Loaded Dropped

Member Type

Member Level

Search Results (19 members found)

#	Member	Membership	Maintain
233 <i>(Primary)</i>	Bill Smith (bsmith2) MD	TFoxMembertype Exp. Date 12/31/2008 <u>Prospective</u>	Profile Bio Notes Charge/Credit Renew
134 <i>(Primary)</i>	bob smith (bsmith) anywhere, VA	Couple Exp. Date 12/31/2006 <u>Expired</u>	Profile Bio Notes Charge/Credit Renew Family & Child Members

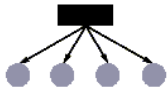
Figure 10.1 – Member Manager

Search for Members

To locate a member, specify the field you want to search on then type the search value. You do not need to enter a complete name or city; just the first few letters. ClubExpress will find all values beginning with those letters. For example, typing “smi” as shown in the example finds all members whose last names begin with these letters. Also note that the search is not case-sensitive. (The “Email Address” and “Outside USA only” options behave slightly differently; see below.)

Press *[Enter]* or click the **Search** button to perform the search. You can also enter limiting criteria from among the following options:

- All member status codes, or just Active, Pending, Trial, Prospective (if enabled), Expired, Frozen, Bulk Loaded or Dropped members. (Note that the “All” option does not include “Dropped” members; this option must be explicitly selected.)
- All member types defined for your club or association.
- All member levels, or just solo/primary, or secondary, or tertiary, or secondary and tertiary members.



If your club or association has subgroups, you will also see a subgroup selector, allowing you to filter the list by members of a subgroup. This selector will dynamically display just the subgroups to which you have access. The following additional choices are added to the list:

- No subgroup assigned – members without a chapter;
- Show all members – everyone, independent of their chapter;
- <club name> - members with any chapter.

A table will be displayed under Search Results listing the matching members. Note also the count of matching values beside the “Search Results” text. If you leave the Show options as “All” and don’t enter a search value, the complete membership database (except for Dropped members) is displayed.

Member records are displayed in pages of 30 members at a time, sorted by the search field selected. Click the **Prev** and **Next** buttons at the top or bottom of the list to move through the pages, or select a page from the drop-down list to select a specific page.

If you select the Company Name option to search or filter by this field, the display is slightly different. Company information is added to the Name column allowing you to see the companies specified by each member.

Search by “Email Address”

This option works slightly differently. A complete email address must be specified and all other advanced options are ignored. A maximum of ten records will be shown with that email address (including all family members who share the address.)

Search for “Outside USA only”

This option also works slightly differently. The Search For box and all advanced options are ignored and the system displays all non-US members.

Search Results

The search results grid displays the following information. More details can be found about many of these choices below.

# Column	
Member Number	Assigned by an admin or automatically by the system
Member Level	Primary, secondary or tertiary, and using the keywords defined by your club or association for secondary and tertiary members.
Member Column	
Company	If your association is configured so that members join through their business or professional lives, their company or organization will be shown above their name.
Member Name	First and Last Name
(Login Name)	Note that the system does not allow you to view the member’s password, for security reasons. But you can reset it. See below.
City, State	Click the link to view a popup window showing the member’s address, phone and email
Membership	
Member Type	One of the types defined under Control Panel – Member Types
Expiration Date	
Membership Status	Maintained by ClubExpress. Click the status link to change the member to a different status. See the section below for an explanation of the different values.
Maintain	
Profile	Click this link to view the Profile screen for this member.
Bio	Click this link to view the member’s Bio page in the Membership Directory.

Notes	Click to write notes about this member. A small icon is displayed beside this link if a note exists.
Charge/Credit	Click to enter a miscellaneous charge or credit for this member.
Renew	If the Renew link is in red, the member is in the “renew cycle” and will see a red Renew link when they login. If the Renew link is in black, the member is not in the “renew cycle” but you can still process a renewal for them. This link is not shown for secondary or tertiary members, or for primary members with a status of Frozen or Dropped.
Primary Member Profile	This link will appear for secondary and tertiary members. Clicking it takes you to the primary member’s Profile screen
Secondary & Tertiary Members	This link will appear for a primary member that has secondary and/or tertiary members defined under the primary membership. Clicking it displays a popup list of these members, to jump to a specific member’s Profile screen.
Payments	If this blue link appears, this member owes money. Click to go to the Pending payments page.



Note that subgroup admins may not see all of these choices, if they have been configured for read-only access to member data.

Add Member

To add a new member, click the **Add Member** button. This function is used when you receive a membership application in the mail or at an event (instead of the member joining online.) You will step through a wizard with between four and eight screens, depending on how your club is configured:

1. Member type
2. Name and contact information
3. Additional Member Data (if configured; see the section below)
4. Member Interests (if configured; see the section below)
5. Additional members and chapter assignments (if configured)
6. Additional charges (if configured; see the section below)
7. Summary screen
8. Payment Method (credit card, check, cash, etc.)

For more information on the member signup wizard, see Chapter 26 – Member Signup on page 387. Note that the admin version does not include the Username and Password screen; a temporary username and password are generated by the system and included in the welcome email sent to the member. (There is also an admin-only option to suppress this email if you want to add members without letting them know that this has happened.) Nor does it include the Joining Agreement screen; the system assumes that anyone who completed a printed form has already agreed to a printed joining agreement.

At the end, the wizard jumps to the Pending Payments screen, which allows you as an administrator to choose from multiple “payment” methods:

- Credit card processed through ClubExpress;
- Credit card not processed through ClubExpress;
- Member check payable to club;
- Cash received by club;
- Write-off (Bad Debt - uncollectible);
- Comp (pending payment is forgiven with \$zero paid);
- Processed by a separate system;
- Payment from Subgroup (this option only appears if subgroups are enabled and if the pending transaction(s) include one with subgroup fees.) Two fields are displayed with recommended amounts retained by the subgroup and owed to the top-level club.

The first four choices generate a payment confirmation email to the member. The last four choices do not generate this email. (When members walk through the signup or renewal wizards, they only see two choices:

- Credit card processed through this website;
- Print an invoice and mail a check.)

Board Approval

However, if the Board Approval option is enabled for this member type (see page 128), the signup process ends with step #7, the Summary screen. The member is added to the database with a status of **Prospective**, ready to be reviewed by the Board of Directors. You can then use the status dialog to Accept, Decline or Drop the prospective member.

Also, if the expiration date is in the past and older than the club’s expiration lag period and your club is configured to expire members, the member will be added with a membership status of **Expired**.

Primary / Secondary/Tertiary Changes

If your club or association has family or business memberships, click this button to make changes to the relationships between primary and secondary members. You will see the following dialog.

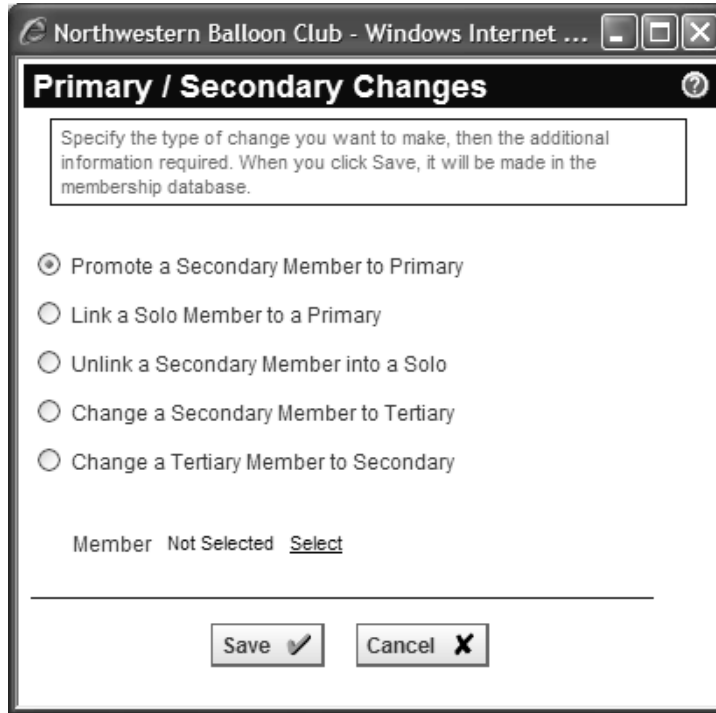


Figure 10.2 – Primary / Secondary Changes

This dialog provides three options:

- Select the first option to promote an existing secondary member within a group to be the primary member. You will be asked to select a secondary member. When you click **Save**, the secondary member becomes the primary member, the current primary is demoted to secondary, and all other secondaries are linked to the new primary.
- Select the second option to link a solo member to a primary. You will be asked to select the solo member and the primary member.
- Select the third option to unlink a secondary member into a solo membership. You will be asked to select the secondary member and the new membership type.
- Select the fourth option to change a secondary member to a tertiary. You will be asked to select the secondary member.
- Select the fifth option to change a tertiary member to a secondary. You will be asked to select the tertiary member.

Member – Address

In the results grid, the **City** and **State** values below the member's name are links; click a value and you will see a screen with the member's name and basic contact information similar to the following.

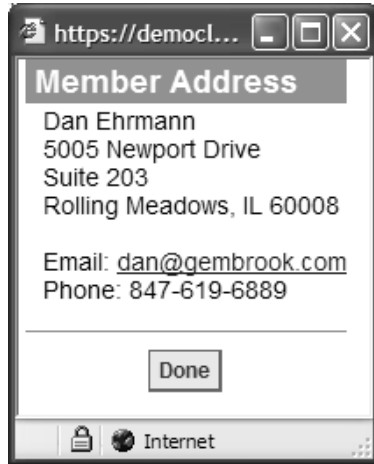


Figure 10.3 – Member Address Popup

This information is conveniently formatted for highlighting, copying to the Clipboard, and pasting into a word processing program or other software. Click **Done** to close the dialog.

Membership Status

In the search results grid, click the membership status for a member and you will see a popup dialog similar to the following, which allows you to change the status of that member:

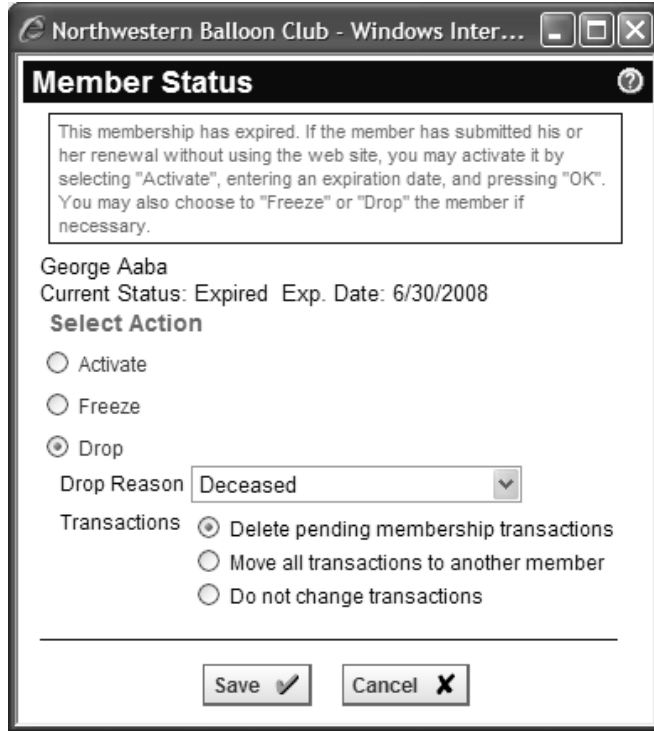


Figure 10.4 – Member Manager Status dialog

The options on this dialog vary depending on the current status of the member. The following status values are supported:

- **Active** members are fully paid up members of your club, with all login privileges. Active can be changed to Expired, Frozen or Dropped.
- **Expired** members have allowed their membership to expire. If they try to login, they will be taken to the Membership Renewal wizard and must renew before they can proceed. Expired can be changed to Active (with a new expiration date), Frozen or Dropped.
- **Frozen** members remain active members of your club. However, their login privileges have been temporarily revoked (perhaps because of inappropriate behavior on the website or at a club function.) Frozen members can be reinstated and the system will determine if the new status should be Active or Expired.
- **Dropped** members have indicated to you that they no longer wish to be considered as members (although their current term may not have expired.) Dropped members can be reinstated and the system will determine if the new status should be Active, Expired or Pending.

Dropped is also the destination for all invalid entries, including duplicates, pranks, errors, and tests. By default Dropped members are not shown in the Member Manager (they are excluded from the “All” option.) You must explicitly select Dropped to see them.

When you drop a member, you can specify the “Drop Reason”, and this information is shown in the Member Manager. You can also choose to delete pending membership transactions, move all transactions to another member (used for duplicates, when a current member signs up anew instead of renewing), or do nothing to transactions.

- **Bulk Loaded** members have been loaded by us into the database and are not yet active. When you are ready to activate these members, contact us. We will run an automated routine which changes their status to Active or Expired, generates a temporary username and password and sends a welcome email with login information and the username and password. Bulk Loaded members can be manually changed to Active.
- **Pending** members have been through the member signup wizard and either elected to mail in a check or tried to pay by credit card but did not succeed. Click the **Payments** link to process a received payment (changing status to Active.) Note that if the club does rolling renewals, the expiration date for this new member will be based on the date that the payment is processed rather than the date when the member originally signed up.

Pending members can be Dropped. If you reinstate a Dropped member and there is an unpaid membership signup transaction, the new status will be “Pending”, allowing the member to log in and complete payment. Otherwise, the membership status will be “Active” or “Expired”, based on the expiration date.

- **Trial** members have selected a special membership type that is configured with the Trial option (under Availability). Trial memberships cannot be renewed using the same type; they must be renewed as one of the standard membership types. This flag is used to help select and highlight Trial memberships for follow-up and reporting purposes.
- **Prospective** members are only possible if your club has enabled the option for a member type where the Board of Directors must approve a member before his or her membership can become active. You can modify the status of a Prospective member as follows:
 - Accept the membership. This option changes the membership status to Pending and the membership fee transaction becomes active. The member is sent a welcome email asking him or her to log in and complete the process by paying the pending fee (which then changes the status to Active.) If the member type does not have a fee, the membership immediately becomes Active.
 - Decline the membership. This option changes the membership to Dropped and sends a regrets email.

- Drop the membership. This option changes the membership to Dropped without sending the email. Use this option if the signup is obviously a prank or an error.

Maintain – Profile

Click the **Profile** link to edit the information on an individual member. You will see the same profile menu screen shown in Figure 8.1 and described in detail in Chapter 8, with the following exceptions:

- A club administrator cannot change the member's login name or see the member's password. The **User ID and Password** choice is replaced by an option to **Reset Password**. Clicking this choice will reset the member's password and send him/her an email with the new password. This choice is commonly used for members who forget their passwords. (If the member does not have an email address, the new password is displayed on the screen and can be relayed to the member by phone.) In both cases, members must change the password when they next log in.
- A club administrator cannot choose whether or not to store a credit card. This decision is reserved for the members themselves.
- On the Contact Info page, club administrators can modify the Member Number and Mailing Name fields.
- When reviewing the membership type, the club administrator has access to all available types, including those that are normally hidden from a member. This allows the administrator to specify complimentary memberships and other special options. The administrator can also change the expiration date, join date and web signup date.
- Administrators have additional edit and delete options on the Transaction History and Payment/Credit History screens.
- Subgroup admins may be configured to have read-only access to member data. In this instance, the standard Profile screen is not displayed. Instead, these admins will see a version of the member bio page, with no editing options provided.

Viewing Related Members

For “solo” members (those who are not part of a membership which includes multiple people), there is nothing under the **Profile** link.

Secondary and Tertiary members see a link titled **Primary Member Profile**. Clicking this link displays the Profile page for this member's Primary member.

Primary members see a link titled **Secondary & Tertiary Members** (but using the actual keywords defined by your club or association.) Clicking this link

displays a small popup window similar to the one below, showing the secondary and/or tertiary members managed by this primary member.

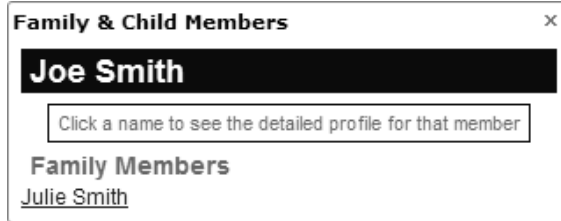


Figure 10.5 – Viewing Secondary & Tertiary Members

Click a link to display the profile for that member.

Notes

Click the **Notes** link to enter individual and private notes on this member. This information is only available to administrators; it cannot be viewed by the member. (However, you should still exercise caution in what you write here, since administrators may change.) The following screen is shown:

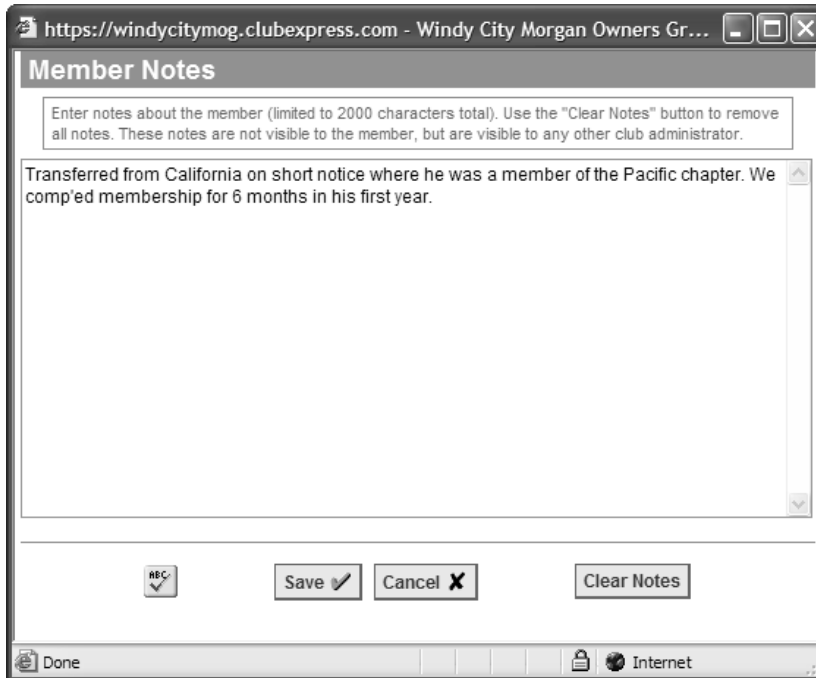


Figure 10.6 – Member Notes screen

Enter up to 2000 characters of text. Click **Save** to save your changes and return to the Member Manager, or **Cancel** to return without saving. Click **Clear Notes** to clear your entry completely; you will be prompted to confirm this action. The ClubExpress spellchecker is also available.

When notes are defined for a member, a small icon will be displayed beside the **Notes** link.

Charge/Credit

Click the **Charge/Credit** link to enter a one-time charge or credit for a member. The following popup screen is displayed:

Figure 10.7 – Member Charge/Credit Screen

First specify whether you are creating a charge that must be paid or a credit, which can be applied against a membership or event registration. You will also need to specify the credit type or charge type.

- For credits, a number of different credit reasons are defined.
- For charges, you can specify a miscellaneous charge or one of the Additional Charges defined for your organization. This option allows you to enter an additional charge for a member at any time during the year, not just during membership signup or renewal times.

Enter the other information required and click **Save** to post a charge or credit to the current member's account; or **Cancel** to close the dialog without posting a charge or credit.

More about Credits

Open credits are displayed on the payment page as a single, aggregate line item that controls the final amount to be paid. The amount applied to a specific payment can be adjusted by an administrator but can never be more than the available transaction or credit amount. So a credit can be partially applied and some will be left over for the next transaction.

Payment receipts show credits applied to the payment. The member's **Profile – Transaction History** screen shows credits applied. The **Profile – Payment / Credit History** screen shows credits and their status.

Payments

If the member has pending payments, the **Payments** link will be displayed in blue. Click this link as a shortcut to the pending payments screen, to process or waive a payment. A screen similar to the following is shown:

Home • Member Profile • Make Payment ?

Make Payment for Martin D Smith (3)

The list below shows outstanding payments due. Use the checkboxes to select which payments you wish to make. Then, make a choice in the "Select Payment Method" dropdown list. If you elect to pay by credit card, enter the required information, and press the "Submit Payment" button. Please allow a minute or so for your transaction to complete.

If you prefer to pay by check, select the "Print Invoice and Send Check" option and press the button with the same name. A printable version of the page will be displayed which includes instructions on how to make out your check and where to mail it.

*Fields marked * require an entry.*

<input checked="" type="checkbox"/>	Donation (5/18/2009)	Due \$ 100.00	Pay \$ 100.00				
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;"><i>Education</i></td> <td style="width: 20%; text-align: right;">100.00</td> </tr> <tr> <td colspan="2" style="text-align: right; border-top: 1px solid black;"><i>Transaction Total:</i> 100.00</td> </tr> </table>				<i>Education</i>	100.00	<i>Transaction Total:</i> 100.00	
<i>Education</i>	100.00						
<i>Transaction Total:</i> 100.00							
<input checked="" type="checkbox"/>	Misc. Charge (6/13/2009)	Due \$ 25.00	Pay \$ 25.00				
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;"><i>Membership Social 6/13/2009</i></td> <td style="width: 20%; text-align: right;">25.00</td> </tr> <tr> <td colspan="2" style="text-align: right; border-top: 1px solid black;"><i>Transaction Total:</i> 25.00</td> </tr> </table>				<i>Membership Social 6/13/2009</i>	25.00	<i>Transaction Total:</i> 25.00	
<i>Membership Social 6/13/2009</i>	25.00						
<i>Transaction Total:</i> 25.00							
<input checked="" type="checkbox"/>	Event Registration (6/16/2009) <i>6/7/2009 - Balloon To Mount Barney</i>	Due \$ 75.00	Pay \$ 75.00				
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;"><i>Martin Smith - Balloon To Mount Barney</i></td> <td style="width: 20%; text-align: right;">75.00</td> </tr> <tr> <td colspan="2" style="text-align: right; border-top: 1px solid black;"><i>Transaction Total:</i> 75.00</td> </tr> </table>				<i>Martin Smith - Balloon To Mount Barney</i>	75.00	<i>Transaction Total:</i> 75.00	
<i>Martin Smith - Balloon To Mount Barney</i>	75.00						
<i>Transaction Total:</i> 75.00							
Total Selected For Payment		\$ 200.00					
<i>Available Credit \$ 10.00</i>		Credit Applied \$ 10.00					
Net Payment		\$ 190.00					

Select Payment Method < Select Payment Method > v

Review the payments due, and select the items you wish to pay for now. Then, select a payment type and follow the instructions provided.

Refund Policy: The refund policy is set by Northwestern Balloon Club. If refunds are available, requests must be directed to Northwestern Balloon Club - they cannot be handled by ClubExpress.

Submit Payment ✓
Cancel ✕

Figure 10.8 – Pending Payments

This screen allows you to view all the pending payments for a member. Individual payments can be checked or unchecked to adjust the total being paid. Available credits will also be shown, adjusting the total amount selected for payment.

The following payment methods are available to administrators:

- **Credit Card Processed on this Web Site.** Use this option to allow us to handle the credit card payment, using either the built-in merchant account or your own account if one is defined. Complete credit card information must be entered so that the transaction can be submitted to the payment gateway. When members see the Pending Payments screen, this option is available.
- **Received Check.** Use this option to record a check received in the mail or at an event. You can enter the check number and date. The transaction will be recorded but no funds will be remitted to you. This option is not available to members using this screen.
- **Received Cash.** Use this option to log cash received in the mail or at an event. The transaction will be recorded but no funds will be remitted to you. This option is not available to members using this screen.
- **Write-Off (bad debt – no emails sent).** Use this option to write-off the pending payment as a bad debt. It will be flagged as closed, without a payment having been made. A payment confirmation email is not sent to the user. This option is not available to members.
- **Comp (forgiven – no emails sent).** Use this option to flag the payment as “comp’ed” – given to the member without charge. It will be flagged as closed, without a payment having been made. A confirmation email is not sent to the user. This option is not available to members.
- **Processed by a separate system (no emails sent).** Use this option to flag the payment as having been paid outside ClubExpress, perhaps before your organization started using ClubExpress. It will be flagged as closed. A payment confirmation email is not sent to the user. This option is not available to members using this screen.
- **Payment from Subgroup.** When a club has chapters with their own fees, some members may send payment to the chapter, which will then keep its portion and send the remainder to the parent club. This option allows you to record both components of the payment correctly. The payment will be flagged as closed; a payment confirmation email is not sent to the user. This option is not available to members, just chapter administrators and parent club admins will see it.

(The end result of these last four options is the same, but their meaning for reporting and in the context of your club or association may be different.)

Most of these options also include a **Notes** field, allowing you to write additional notes on the payment.

Note however that your club or association may have chosen to disable checks or credit cards, so some of these options may not be present.

(At ClubExpress, we have access to two additional options:

- **User Check Payable to ClubExpress.** This option allows us to receive checks from members and non-members on your behalf, process them through the system, and have the funds remitted to you on our normal schedule. There is a small additional fee for this service.
- **User Check (payable to club, sent to ClubExpress).** This option allows us to process checks received at our office but which are payable to you. The transaction is logged and the checks are physically forwarded, but no funds are remitted. There is a small additional fee for this service.

To complete the transaction, click the **Done** or **Submit Payment** button, which will appear once the processing method has been selected.

Deleting a Member

To remove a member from the active membership roster, click the **Status** link and change that member's status to **Dropped**. Dropped members are not normally visible on screens and in reports.

ClubExpress does not provide a true *Delete* function. The reason is that there may be other data linked to a member, including transaction history and event registrations. Fully deleting a member from the database might cause this information to become unlinked or to display incorrectly.

MEMBER TYPES

Clicking this choice displays the following screen:

Home • Control Panel • Member Type Administration

Member Type Administration

This screen allows you to define different member types for your association . Click Add Type to add a member type, or Edit to update an existing type. Delete can only be selected if there are no members of that type in the database. Each member type has a name, description, fee, duration and visibility.

Add Member Type

Name	Dues	Duration	Availability	Maintain
Family	400.00	12 Month	New Members and Renewals	Edit
High Flyer Club	55.00	6 Month	New Members and Renewals	Edit
Honorary	0.00	12 Month	Admin Only - Not Publicly Available	Edit
Quarterly	50.00	3 Month	Admin Only - Not Publicly Available	Edit
Senior	20.00	12 Month	Admin Only - Not Publicly Available	Edit
Single	45.00	12 Month	New Members and Renewals	Edit
Student	15.00	12 Month	New Members and Renewals	Edit
Trial Membership	0.00	99 Month	Trial - New Members Only	Edit

Return to Previous Page

Figure 10.9 – Member Types

This screen allows a club or association to define its various membership types, including single, family, senior, youth, multi-year, complimentary and other options. Each membership type has an associated price, duration, and availability. To add a new type, click the **Add Member Type** button. The following screen is displayed:

Home • Control Panel • Member Type Administration • Add/Edit Member Type

Add/Edit Member Type

This screen allows you to add a member type or update an existing type. Duration is defined in months rather than years to allow you to create six month memberships for people who join in the middle of a billing cycle. Not visible member types can only be selected by the membership director or an administrator; use this option for complimentary memberships. For lifetime memberships, set the duration to a large number such as 120 months (10 years).

General Settings

Name

Description
Max 300 characters

Duration Month(s)

Availability

Renewal

Fee Change?

Web Site Menu

Apply Subgroup Fees

Financial Account

QuickBooks Item Name

Requires Approval? Yes No

Printed newsletter Yes No

Chapter Selection

Figure 10.10a – Add/Edit Member Type (top part)

Specify the name and description of the membership type. The name appears in the drop-down list when a member joins, while the description will appear underneath once a type is selected.

Duration

Durations are specified in months to allow organizations to specify a full range of dates, including quarterly or multi-year memberships.

You can create durations as low as 1 month but these short renewal cycles are really only suitable when renewals are set to Automatic or Automatic with Payment (see below for more information.)

Availability

The following options are available in the drop-down list:

- **New Members and Renewals**
- **New Members only.** This type will not be shown to renewing members.
- **Renewals only.** This type will not be shown to new members.
- **Trial – New members only.** This option allows you to create a special membership type for trial memberships. It can have any duration and fee. When users select this type, they also get a special membership status of **Trial**, allowing you to quickly locate these members.

Trial members also see an **Upgrade Membership** option if they log in. This option allows them to “renew” to a regular membership at any time. Trial memberships cannot be renewed using the same membership type; users must select one of the other types from the list of available “new” member types.

A special feature allows you to control whether Trial members can login to the website. See the Control Panel – Website Options screen to configure this. The default is to allow access. If Trial members cannot login and they try to do so, they are taken to the first page of the renewal wizard and they have to upgrade to a full membership.

- **Renewals – same type only.** This member type will only be shown to members who already have this type. Use this option to “grandfather” long-time members who might have a special deal.
- **Admin only – not publicly available.** This type will only be shown to admins. Use this option when a board of directors defines a lifetime membership for people who have provided exceptional service to the organization, or if the board wants to grant a complimentary membership, for example, to the editor of the leading magazine within your community.

Renewal

Select this option to control how renewals are handled for this member type. The default is to use the default settings that are defined on the **Renewal / Expiration Settings** page.

Select **Automatic Renewals** if you want ClubExpress to renew this member automatically. When you select this option the screen will refresh and you will be asked to specify the number of days before expiration when the renewal should take place.

This option was specifically added for community service clubs and any club or association that charges a standard fee each month or each quarter. ClubExpress will generate the standard fee transactions for you and you can then email members to log in and pay the fee, or print invoices showing all pending payments and mail them to members.

Important Note: this option does not automatically charge membership fees to a credit card. Members must still log in to pay pending charges by credit card or print an invoice and mail a check. Administrators can also print and mail invoices proactively.

Select **Automatic Renewal and Payment** to renew and charge a member's saved credit card automatically, based on the duration of the membership. This option is only available if you have established your own merchant account; it cannot be used in conjunction with the built-in merchant account because automatic payments can be a significant source of disputes and chargebacks.

When this option is selected for a member type, members will sign up as normal and make their initial payment. A credit card is required and it will be saved (members do not have this option.) When the specified duration has passed, the membership will be renewed automatically and the saved credit card will be charged. Emails are sent to the member as normal.

If the credit card transaction fails for any reason (for example, a card expiration or a changed address), the member will be notified and the transaction will remain as pending. Once the missing or bad information is corrected, the updated card will be charged automatically.

When members want to stop automatic charges, they login to the website, go to their **Profile** screen and click the **Cancel My Membership** button.

Fee Change

You can optionally specify a different membership dues amount for expired members. There are three options:

- **None.** The same amount is charged whether the member is expired or still active.
- **After Expiration Date.** The different amount will be charged if the member's expiration date has passed, whether or not the member is actually expired.
- **After Actual Expiration.** The different amount will be charged if the member's status is "Expired". This option is used when you have defined an expiration lag period where the membership status is not changed to Expired until X days after the expiration date (see page 127).

If a dues change is enabled, you can specify the dues after expiration in the Fees section at the bottom of the page.

Website Menu

Select a menu from the list of defined menus that members of this type will see once they login. This feature allows you to define different menus for each member type, or to use a default menu. For more information, see page 188.

Apply Subgroup Fees

This option will only appear if your organization has subgroups (chapters, districts, and regions) and if you are charging membership dues at these levels. There are three options:

- **Every Time.** The fee at each level is charged for each chapter, district and region that the member joins. For example, if a member joins two separate chapters, he may be charged two chapter fees, two district fees and two region fees.
- **Once Per Member.** The fee at each level is charged only once per member. For example, if a member joins two separate chapters in the same district, he may be charged two chapter fees but only one district and one region fee. (However, if the chapters are in different districts, each district may charge a separate fee.)
- **Once Per Membership.** The fee at each level is charged only once for the whole membership. For example, in a mother's playgroup if a membership includes two kids in the same chapter, district and region, the respective fees are only charged once per family.

Financial Account and QuickBooks Item Name

QuickBooks

Select the financial account to use for this membership revenue. You can select a detail account that you created or the master membership account that is built into the system. Specify the QuickBooks Item Name to link this member type to a QuickBooks item when transactions are exported.

Requires Approval?

On the Control Panel – Membership Options screen, you can configure a global default whether membership must be approved. But this default can be overridden for each membership type. For example, some associations have a special type for students, at a reduced rate. But the member's student status may need to be verified before he or she is allowed to pay this rate.

- If you specify **No**, then members can signup through the website, pay the specified fee and become “Active” on the spot.
- If you specify **Yes**, then members can still signup through the website. However, at the end of the signup wizard before the payments page, the member is added to the database with a status of “Prospective”. Admins can view a list and print a report of prospective members for review by the board. You then have the option of accepting the member (which changes the status to **Pending** and invites the new member to log in and complete payment—changing the status to **Active**) or declining the member (which changes the status to **Dropped**, sending a “regrets” email.)

Printed Newsletter

On the **Control Panel – Membership Options** page, you can configure whether members pay extra for a printed newsletter. Some clubs are moving to digital newsletters that members read online or download; if members want a printed newsletter, they have to pay extra, based on their member type.

Select **Yes** if this member type includes a printed newsletter or **No** if it does not. If this option is not visible it means that the cost of a printed newsletter is not considered separately as part of the cost of a membership.

Chapter Selection

If your organization supports subgroups (chapters, districts and regions), you can control how many chapters a member can join. Select from one of the following options:

- **None.** This type does not allow members to join a chapter.
- **May select only one.** Members may select a single chapter, but this is not required. Use this option if you don't have chapters in every part of your service region, so some members must join the top-level club only.

- **Must select only one.** Members must be assigned to one and only one chapter. They cannot complete the signup or renewal process without selecting a chapter.
- **May select one or more.** Members may select a single chapter or multiple chapters, but they do not have to select a chapter.
- **Must select at least one, may select more.** Members may select a single chapter or multiple chapters, but they cannot complete the signup or renewal process unless they have selected at least one.
- **Same as Primary.** Secondary and tertiary members will be assigned to the same chapter(s) as their primary member. This option is only available for secondary and tertiary members.

The Member Types Add/Edit screen continues below.

Family Members	
Does this membership include additional family members who will each have their own login and password? <input checked="" type="radio"/> Yes <input type="radio"/> No	
How many? Minimum:	0
Maximum:	4
Chapter Selection	May select only one
Children	
Does this membership include additional children? <input checked="" type="radio"/> Yes <input type="radio"/> No	
These members will not be able to log in to the web site.	
How many? Minimum:	0
Maximum:	5
Chapter Selection	None
Fees	
Club Level Fees	
Primary Member Fee \$	40.00
Family Member Fee \$	0.00
Child Member Fee \$	0.00
Region Level Fees	
Fee Control	Club Level
<i>Fees charged are controlled by the club - they cannot be customized at the local level</i>	
Primary Member Fee \$	0.00
Family Member Fee \$	0.00
District Level Fees	
Fee Control	No fee
<i>No fees charged at this level</i>	
Chapter Level Fees	
Fee Control	No fee
<i>No fees charged at this level</i>	
<input type="button" value="Save ✓"/> <input type="button" value="Cancel ✕"/>	

Figure 10.10b – Add/Edit Member Type (bottom part)

<Secondary> Members

Note that the system will display the keyword you specified for secondary members on the Control Panel – Club Options page.

Primary members own the account; they can add or remove their own secondary and tertiary members from the Profile screen. Secondary and tertiary members, on the other hand, do not see account management options on their Profile screen, nor will they ever be asked to renew; their membership is entirely dependent on the status of the primary membership. They have the same member type as the primary, they renew when the primary renews and expire when the primary expires.

Secondary members have a login and password and can login to the website to participate in all club activities as members. (Note that ClubExpress charges a reduced fee for each active secondary member in your database.)

If this member type includes secondary members, select **Yes**, then specify the minimum and maximum number of members allowed. Then specify whether secondary members can also join chapters; the available options are described on the previous page.

<Tertiary> Members

Note that the system will display the keyword you specified for tertiary members on the Control Panel – Club Options page.

Tertiary members do NOT have a login and password and cannot login to the website. But they are included in blast emailings and in mailing lists of active members. (Note that ClubExpress does not currently charge a fee for active tertiary members in your database, although we reserve the right to change this policy.)

When members join your club through their personal lives, tertiary members are appropriate for very young family members that you want to track in the database but who do not need the ability to login. When members join your club through their business or professional lives, tertiary members are appropriate for other contacts at a business who might be interested in club activities but who also do not need the ability to login.

If this member type includes tertiary members, select **Yes**, then specify the minimum and maximum number of members allowed. Then specify whether tertiary members can also join chapters; the available options are described on the previous page.

Fees

The fees section of the page will be different based on the options selected above and elsewhere.

- The Primary Member Fee is always shown.
- If you specified that this fee changes after expiration, an additional field is provided on the right side to specify the changed fee.
- If you enabled secondary and/or tertiary members, fields are provided to specify the fee for each secondary and/or tertiary member, again using the keywords chosen on the Control Panel – Club Options page.
- For each of the subgroup levels defined (region, district and chapter), you can specify whether a fee is charged and who controls this fee. For some clubs and associations, fees are defined at the top level and cannot be changed by individual regions, districts and chapters. For other clubs and associations, default fees are defined at the top level, but they can be individually adjusted for each region, district and/or chapter. ClubExpress gives you full control over these options.
- If a fee is charged at a specific level, you will see fields to define separate fees for each member level (primary and optionally also secondary and tertiary.)

Click **Save** to save your changes and return to the Member Types list, or **Cancel** to cancel without saving.

Note: if you have specified that fees are different for each chapter, district and/or region, be sure to select the **Edit Membership Fees** option when you are defining chapters, districts and/or regions. See page 177.

RENEWAL / EXPIRATION SETTINGS

Click this choice to display the following screen:

Home • Control Panel • Renewal/Expiration Settings

Renewal/Expiration Settings

This screen specifies various options for how renewal notices and membership expirations should be handled. These options are used by ClubExpress to generate renewal emails and letters to members on the appropriate schedule. They are also used to determine when a member's account should be flagged as inactive.

Renewal Schedule

Select 'Rolling' renewals if your renewals are based on the date the member joined. For example, if a member joined with an annual (12 month) membership on August 14, they will renew every year on August 14.

Select 'Same Date' for cyclical (annual, quarterly, etc) memberships where all members renew on the same date. Select the starting date for the renewal cycle. For example, if you have selected January 1st as the start date, and you have created membership types with a 3 month (quarterly) duration, all members will have to renew on January 1, April 1, July 1, and October 1.

When do members renew their memberships?

Rolling renewals based on join date

Everyone renews on the same date

Specify Cycle Start Date January 1st

Do you offer a grace period if someone joins the club before the start of a renewal period?

No

Yes Length of grace period 2 months

Renewal Process

ClubExpress can send renewal notices to remind your members to renew their memberships. You may elect to send one notice only, or also send second and third notices to members who did not renew after the previous notice. If you prefer, you can also choose to set the renewal flags only so that members will see a 'Renew' link the next time they log in, but they will not receive any renewal notices. Finally, you can instruct the system to take no action regarding member renewals.

How should the system handle member renewals? Send three renewal notices

Send first notice 30 days before expiration by Email, or regular mail if no email specified

Send second notice 15 days before expiration by Email, or regular mail if no email specified

Send third notice -5 days before expiration by Email, or regular mail if no email specified

For the third notice only, you may specify a negative number to send notice after the expiration date has passed.

Expiration

Should the system expire memberships if a renewal is not received?

No

Yes - On Expiration

Yes - With Delay 20 days after expiration

Figure 10.11 – Renewal/Expiration Options

This screen governs various options for handling membership renewals and expirations. The following options are provided:

Renewal Schedule

Clubs and associations either renew everyone on a rolling basis based on the date that they joined the organization or on the same date. The first option (“rolling renewals”) works for all membership durations, not just multiples of 12 months. So if you have 3 or 4 or 6 month memberships, select this option.

If “same date” is selected, additional options will appear:

- The start month of the cycle must be specified. The date is assumed to be the first of the month.
- Some organizations offer a grace period if someone joins a short time before the renewal date. For example, if everyone renews on January 1st, some groups will allow new members who join in November to receive a slightly extended membership for the first year. (Without this option, no one would join near the renewal date.) If you provide such a grace period, click **Yes** and specify the number of months up to 3.

Renewal Process

The vast majority of clubs and associations send out renewal notices. (Some clubs generate and send invoices while others do neither, preferring instead to collect renewals at the first meeting of the “season”.) ClubExpress supports all of these options:

- Select **Do not take any action** if you don’t want the system to handle renewals for you. You will be fully responsible for notifying members that it’s time to renew. No emails or letters will be sent.
- Select **Send one renewal notice** if you want to system to generate a single renewal notice, If you select this option, you will be prompted to enter the number of days before expiration that the notice should be sent and the delivery method.
 - The default is **Email, or regular mail if no email specified**. This option sends emails where possible and a printed renewal notice if there is no email address. (Our current policy is to charge the club the current 1st class postage plus an additional 20¢ to cover printing, folding, enveloping, sealing and delivery.)
 - Select **Email only (no regular mail)** if all members have an email address and you don’t want to pay for printed notices. This option will not send a renewal notice to members without an email address.
 - Select **Regular mail only (no email)** if you only want printed notices to be sent. (Our current policy is to charge the club the current 1st class postage plus an additional 20¢ as described above.) We discourage the use of this option, especially for the

first notice. If your members are generally diligent about renewing, you may choose this option for the second or third notices as a final reminder for the stragglers.

Note that the notice is not an invoice; it's a reminder to the member to log into the website and step through the renewal wizard. Members might change their membership type or select different additional charges, so there's no way to determine in advance a final invoice price.

This option is also appropriate for a state or national association where the majority of members renew through local clubs or chapters. It's a reminder that the national dues need to be paid. Renewal notices can be customized to include any language you require, for example, a reminder to renew through your local club.

- Select **Send two renewal notices** if you want the system to send an initial notice and then a reminder to everyone who has not already renewed. You will be prompted to enter the number of days before expiration and the delivery method for each notice.
- Select **Send three renewal notices** if you want an initial notice and two reminders. With this option only, the third notice can be entered with a negative number of days; the system will send this notice after the expiration date but before the actual expiration. (You would use this option if you have configured an expiration lag period, so that memberships expire some number of days after the actual expiration. See below.)
- Select **Set Renewal Flags Only (no notices sent)** if you want the system to turn on the "Renew Now" text without sending out renewal notices. This option is appropriate if you want to handle your own renewal notices and to have the "Renew Now" text visible when members login.

Note that there are also options to renew and even to charge members automatically; these can be found in the Member Type Add/Edit screen because they are defined at the individual member type level.

Expiration

Finally, ClubExpress allows you control how expirations are handled.

- Select **No** to stop the system from expiring members when their expiration date passes. You will be responsible for handling this manually from the Member Manager. Important Note: if you select this option, you will continue to be charged a monthly fee by ClubExpress for expired members even though you have not received dues from this member.
- Select **Yes – On Expiration** to expire members on their expiration date. Note that the actual expiration may be one or two days after this date because it is handled by a process launched from our office.

- Select **Yes – With Delay** to expire members a specified number of days after their expiration date. Use this option to give members a grace period before their membership is considered to be expired.

Click **Save** or **Cancel** to close this screen and return to the menu.

MEMBERSHIP OPTIONS

Click this choice to display the following screen (top part). This screen lists other configuration options related to membership.

The screenshot shows a web browser window with the following content:

- Navigation: Home • Control Panel • Membership Options
- Section Header: **Membership Options**
- Introductory Text: "This screen lists other configuration options and types of information that can be collected on members. Some clubs want to collect this information while others do not need it. So we made it optional."
- Configuration Options:
 - Does membership require approval by the board of directors? Yes No
 - Can members enter an alternative address to be used at certain times of the year? Yes No
 - Can members enter work information (company, title, work phone)? Yes No
 - Do you track sponsors for your members? (dropdown)
 - Duplicate Signups Allowed? Yes No
 - Capture Primary Member Gender? Yes No
 - Chapter selection in the member profile (dropdown)

Figure 10.12a – Membership Options (top part)

Board of Directors Approval

This option controls whether members join immediately through the website or whether they must first be approved by the Board of Directors.

- If you specify **No**, then members can signup through the website, pay the specified fee and become **Active** members on the spot.
- If you specify **Yes**, then members can still signup through the website. However, at the end of the signup wizard before the payments page, the member is added to the database with a status of **Prospective**, Admins can view a list and print a report of prospective members for review by the board. You then have the option of accepting the member (which changes the status to **Pending** and invites the new member to log in and complete payment—changing the status to **Active**) or declining the member (which changes the status to **Dropped**, sending a “regrets” email.)

This is a default setting. It can be customized for each member type.

Alternative Address

This option controls whether a second block of address fields are made available. Some clubs have members who winter in Florida or Arizona (for example) or summer at a holiday house. Other associations use this option to track a home address separate from the business address.

If this option is enabled, the Contact Information screen provides the fields for an alternative address, as well as the option of enabling this address for club mailings.

Work Information

This option controls whether members can enter work-related information, including company, title and work phone. Some organizations include networking as a goal and encourage members to help each other out in professional settings, while others are entirely focused on a hobby or interest, and work contacts are inappropriate. (Note that this option is ignored if the alternate, business-oriented, Contact Information page is enabled.)

Sponsors

Some clubs and associations track sponsors for new members. Select this option to control whether a sponsor field is displayed during the sign-up process and on the Contact Information screen, and whether a name must be specified or can be left out.

Duplicate Signups Allowed

If this option is set to **No**, the system will perform a test after the first page of the member signup wizard, to see if the email address / first name combination is already in the database. If it is, the new member will not be allowed to create a new account, but instead will be directed to the Login page to login to their existing account.

Capture Primary Member Gender

Do you want to track the gender of primary members? The default is No; if you select Yes, a Gender field will be displayed on the Contact Information screen.

Chapter Selection in Signup/Renewal Wizards

This setting has three options:

- None – the chapter selector is not visible. Use this option when your club or association has chapters but members don't explicitly sign up for a chapter.

- Admins Only – the chapter selector is visible to admins only during member signup and renewal. Use this option when members are assigned to a chapter by an admin.
- Member and Admin – use this option when members pick one or more chapters as they are signing up or renewing.

Chapter Selection in the Member Profile

This setting has the same three options as above. But it controls the chapter selector in the Member Profile screen.

- None – use this option if chapters cannot be changed in mid-year.
- Admins Only – use this option if members cannot change chapter assignments in mid-year but admins can.
- Member and Admin – use this option if changing chapter assignments has no fee or other implications; members can join and leave chapters at any time.

Note that ClubExpress does NOT calculate prorated fees for chapters, districts and regions when these assignments are modified in the middle of the membership year.

The Membership Options screen continues below.

Secondary Members

Information Level Basic Info Only Detailed Info
Basic info includes name and email, birthday, and gender (as specified below). Detailed info adds address, phone, and work data.

Capture Email Address? Email address is optional ▼
Email is always included with detailed info.

Capture Birthday? Birthday is optional ▼

Capture Gender? Yes No

Capture Member Relationship? Member relationship is optional ▼

Can secondary members be added outside the sign-up and renewal wizards? Yes No

Tertiary Members

Information Level Basic Info Only Detailed Info
Basic info includes name and email, birthday, and gender (as specified below). Detailed info adds address, phone, and work data.

Capture Email Address? Email address is optional ▼
Email is always included with detailed info.

Capture Birthday? Birthday is optional ▼

Capture Gender? Yes No

Capture Member Relationship? Member relationship is optional ▼

Can tertiary members be added outside of sign-up and renewal wizards? Yes No

Figure 10.12b – Membership Options (middle part)

<Secondary> and <Tertiary> Members

Note that ClubExpress will use the terms defined for these membership levels on the Control Panel – Club Options screen.

If secondary and/or tertiary members are enabled for any member types, the following options are displayed:

Information Levels

Capture Email Address

Capture Birthday

Capture Gender

Capture Member Relationship

Select Basic Info (name only) or Detailed Info (which adds address, phone and work fields.) You can also optionally add email address, birthday, gender, and member relationship to each form.

Member relationship is a keyword indicating how the secondary or tertiary member is related to the primary (spouse, child, parent, co-worker, associate, etc.) An extensive list of keywords is available.

Can <...> members be added...

If this option is set to **Yes**, members can be added at any time. If this option is set to **No**, members can only be added during the membership signup and renewal process.

Note that ClubExpress does NOT calculate prorated fees for secondary and/or tertiary members when they are modified in the middle of the membership year. So you will generally set these options to **Yes** if there are no additional fees, or **No** if additional fees need to be calculated.

The Membership Options screen continues below.

Directory Options	
Can members limit the information shown in the member directory (including opting out of the directory completely)?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show member's nickname?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show member's birthday?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show spouse's first/last name?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show spouse's birthday?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show member's wedding anniversary?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show year for birthday and anniversary?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Enable Social Networking Links?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Miscellaneous Options	
Next member number	<input type="text" value="1974"/>
Default member state	<input type="text" value="New York"/>
Notify Membership Director when a new member signs up or an existing member renews?	<input type="text" value="New Membership and Renewals"/>
Warn if email address is blank?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Require an email address for members?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Require an email address for non-members?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Require phone number?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Days before a pending member is warned <small>No warning will be sent if blank or zero</small>	<input type="text" value="5"/>
Days before a pending member is dropped <small>Pending members will not be dropped if blank or zero</small>	<input type="text" value="30"/>
How do you decide which members receive a printed newsletter?	<input type="text" value="By member type"/>
Members join through their	<input checked="" type="radio"/> personal lives <input type="radio"/> business/professional lives
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 10.12c – Membership Options (bottom part)

Directory Options

If the Membership Directory module is enabled, an additional set of options related to this module, are displayed. For more information on enabling or disabling this module, see page 188.

Limiting Visibility

This option controls whether members can limit what information is shown in the Membership Directory, including opting out of the directory completely. Some organizations require members to be fully listed.

Note that this option is ignored for administrators; all member contact information is shown in the Membership Directory and in the Member Manager.

Nickname, Spouse Names, Birthdays and Anniversary

These options control whether the primary member's nickname, date of birth, spouse first and last names and date of birth, and a wedding anniversary can be entered. Some social clubs, community service clubs and homeowner/condo associations track this information, and we've also provided a calendar report showing all of these dates.

You can also specify whether the year is included in the Membership Directory display.

Social Networking Links

This option controls whether members can create links in their profile to the popular social networking services (FaceBook, LinkedIn, MySpace and Twitter.) If you select "Yes", members will be prompted to enter their ID for each service. The system will then display that logo in the Membership Directory screen; clicking the logo displays a public profile page in the appropriate service.

Miscellaneous Options

Next Member Number

What number should be used for the next new member?

Default Member State

For clubs or associations that serve one city or state only, this option allows you to specify a state that is entered as a default. A "<None>" option is available for clubs where this setting does not apply.

Notify Membership Director

Set this option to **New Membership Only** if the membership director should receive an email whenever a new member signs up, or **New Membership and Renewals** to send the email on both events. Define the "membership director" title and function on the Control Panel – Titles screen. Assign someone to this title on the Control Panel – Contacts screen. Set this option to **No** if a notification email should not be sent.

Require an Email Address

You can configure ClubExpress to require an email address for members and for non-members. If the email address is *not* required, you can also configure the system to display a warning message that an email address is **STRONGLY** encouraged because the club uses this channel to communicate with its members. Note that required email addresses are not enforced for admins.

Require Phone Number

Use this option to configure ClubExpress to require a phone number for each primary and secondary member.

Warning and Dropping Pending Members

When new members sign up online, but before they pay, their information is stored in the database with a status of Pending. If they pay immediately by credit card, their status is changed to Active. But for members who don't pay immediately, their status stays as Pending. They can still log in but must go to the payment page to complete payment.

You can specify the number of days from signup to wait before a warning message is sent to Pending members that they need to log in and complete payment. You can also specify the number of days from signup before the pending membership is Dropped.

Printed Newsletters

This option allows you to control who can receive a printed newsletter. Many clubs and associations are moving to digital newsletters that members view online or download as a PDF to their local computers. Some clubs charge extra for a printed newsletter or allow members to opt-out of receiving one in order to save the club some money. Select from one of the following options:

- Not applicable to us
- Based on Member Type. Selecting this option causes a new option to be displayed for each member type. You can have types that do not include a printed newsletter and more expensive types that do.
- Members specify their choice. Selecting this option causes a new option to be display on the member's Contact Info page, allowing them to opt-out of receiving a printed newsletter.

On the Control Panel – Data Exports page, a special export generates a list of members who should receive a printed newsletter, based on which of the above options was selected. For example, if “Based on Member Type” is selected, only members with a type that includes the newsletter are included. If “Members specify their choice” is selected, only members who have checked the box on their Contact Info page will be included.

Personal vs. Business/Professional Memberships

People join some clubs or associations through their personal lives, their hobbies or passions or families. Other clubs or associations are professional or trade groups, where people join through their business lives.

ClubExpress includes two versions of the Contact Us page and the Member Directory page, one for each option. Specify the appropriate radio button to select which page should be used.

Click **Save** or **Cancel** to close this window and return to the menu.

MEMBERSHIP WIZARDS SETUP

Select **Membership Wizards Setup** to customize which screens are displayed in the New Member Signup wizard and the Membership Renewal Wizard. You will see the following screen.

	New Member Signup Wizard		Membership Renewal Wizard	
	Member	Admin	Member	Admin
1. Member Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2. Contact Information	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Club Questions <i>Club questions must exist and be enabled for the membership application, for this page to appear. The question must be also be associated with the membership type selected by the member.</i>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Member Interests <i>The interests module must be enabled, with visibility set for any web site visitor, for this page to appear.</i>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Chapters/Additional Members <i>Chapters must be enabled and must exist, for this page to appear. The "Additional Members" selection will depend on the member type.</i>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6. Username/Password	<input checked="" type="checkbox"/>	-	-	-
7. Additional Charges <i>Additional charges must be set up in advance, for this page to appear.</i>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8. Joining Agreement <i>A joining agreement must be created, for this page to appear.</i>	<input checked="" type="checkbox"/>	-	<input checked="" type="checkbox"/>	-
9. Summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Buttons: Save ✓, Cancel ✕

Figure 10.13 – Membership Wizards Setup

On the left side is a list of the available screens in the order in which they appear. Each column displays the settings for each wizard, in both user and admin versions. Check the boxes you wish to appear for each wizard.

Note that some screens require that other options should also be set. For example, checking the “Joining Agreement” screen won’t display that screen unless a joining agreement has been defined.

Click the **Save** button to save your changes and return to the Control Panel, or **Cancel** to return without saving.

See Chapter 26 – Modules – Member Signup for a detailed view of each screen.

ADDITIONAL MEMBER DATA

Many clubs and associations have unique questions that are asked of members when they join or renew, or when they register for events. These questions may be used to establish qualifications, certifications or experience; in some enthusiast clubs they are used to determine what product the member uses to enjoy his/her hobby.

Questions can be configured to appear during the member sign-up process and to be required, or they can be placed on the profile screen and be optional.

Selecting **Additional Member Data** displays the following screen:

Home • Control Panel • Additional Member Data

Additional Member Data

Use this screen to define questions which are asked of members as part of the joining process and on their member profiles. The questions and the member's answers are shown on the member's Additional Member Data page. Click Add Question to add a question, the Edit link to modify an existing question and the Delete link to remove a question. (Note that if you delete a question, all answers to that question are also deleted.) Display Sequence allows you to change the order of questions.

Question Name	Ans. Type	Visibility	Edit	M. App.	Maintain
ABA Number	Integer	Dir/Profile	Member	N/A	Edit Delete Member Types Answers
Years Flying	Integer	Dir/Profile	Member	Opt.	Edit Delete Member Types Answers
Certification Level	Select List	Dir/Profile	Admin	N/A	Edit Delete Member Types Answers

Figure 10.14 – Additional Member Data

This screen shows the questions already defined, including the question name, type, whether the question is on the membership application, whether an answer is required and whether the question and answer are included in the member's directory entry. To add a question, click the **Add Question** button. The following screen is displayed:

The screenshot shows a web browser window titled "Northwestern Balloon Club - Windows Internet Explorer" displaying the "Add/Edit Question" form. The form has a title bar with a question mark icon. Below the title bar is a text box containing instructions: "Question name is used for reference only and is not shown to the member. Questions can be answered in different ways, so the Answer Type drop-down list allows you to specify the most appropriate type for each question. Different types allow for different Values to be entered. Some questions must be asked as part of the membership application, while others are simply there for additional background on members." The form fields are as follows:

- Question Name:** A text input field containing "Highest Cert." with a small diamond icon to its right.
- Question:** A text input field containing "What is the highest level of certification you have achieved?" with up and down arrow icons to its right. Below this field is the text "Maximum 250 characters."
- Notes:** A text input field containing "(Only enter certificates which have been completed.)" with up and down arrow icons to its right. Below this field is the text "Notes (if entered here) will appear under the question field".
- Answer Type:** A dropdown menu currently set to "Select List".
- Values:** A text input field containing "None;Solo;Passenger/Pass;Instructor;Examiner" with up and down arrow icons to its right. Below this field is the text "Enter the items to be displayed in the list, separated by semi-colons."

Below these fields is a section titled "Options" with three dropdown menus:

- Visible On:** A dropdown menu set to "Membership Directory and Member Profile".
- Editable By:** A dropdown menu set to "Member".
- Membership App.:** A dropdown menu set to "Yes, and Required".

At the bottom of the form are two buttons: "Save" with a checkmark icon and "Cancel" with an 'X' icon.

Figure 10.15 – Add/Edit Question

For each question, specify a name or title for the question. You will use this to identify the question in the admin list and in reports, but it is never shown to the user. Then specify the question itself.

The Question Notes option allows you to specify an additional explanation that is displayed in smaller text under the question. This explanation helps users understand what information you are seeking and the format for their answer.

Answer Types

Different questions can be answered in different ways. ClubExpress supports a number of different formats for each question. As you change the answer type, a small prompt will appear under the Values field indicating what additional information you need to specify. (You may need to wait a few seconds for the screen to refresh.) The following formats are available:

Answer Type	Display Format	Values
Text	Text field	Enter a number from 1 to 100 representing the maximum text length allowed.
Long Text	Large text block	n/a. Note that embedded line breaks are retained in Long Text fields.
True/False	Radio button	Enter the “True” text, then a semi-colon, then the “False” text.
Date Year	Drop-down list showing 4-digit numbers.	Enter the lowest 4-digit year allowed, then a semi-colon, then highest 4-digit year allowed.
Date Month	Drop-down list showing the months of the year, spelled out.	n/a
Date Day	Drop-down list showing the numbers 1-31.	n/a
Date Full	Text field with a popup date-picker icon.	n/a
Integer	Text field	Enter the lowest integer allowed, then a semi-colon, then the highest integer allowed. Integers are whole numbers with no decimals.
Number	Text field	Enter the lowest number allowed, then a semi-colon, then the highest number allowed.
Select List	Drop-down list showing the choices in the order entered.	Enter the items to be displayed in the list, separated by semi-colons with no spaces.

Visible On

You can control the visibility of a club-specific question and its answer. Three options are available:

- **Membership Directory and Member Profile.** The member and other members can see the question and answer.
- **Member Profile Only.** The member can see the question and answer but other members cannot.
- **Member Profile Admin Only (not to member).** This option is for questions that will be completed by an administrator. If this option is selected, the following two options are disabled.

Editable By

You can control who can modify the member's answer to a club-specific question:

- **Member** (and by implication, admins as well).
- **Admin Only.** If this option is selected, the following option is disabled.

Membership Application

Finally, you also have the option of adding individual questions to the membership application. If any questions are so flagged, an additional page is added to the new member application, immediately after the initial Contact Information page. You also have the option to require an answer to specific questions. If this option is enabled, users cannot proceed with the signup process until an answer is provided. Questions that are not added to the membership application will still appear under the **Additional Member Data** choice in the member's Profile menu.

Maintain

Click the **Edit** option to edit an existing Club Question. The Add/Edit screen is displayed for the existing question.

Click the **Member Types** option to configure which member types will see this question. You will see a screen similar to the following:

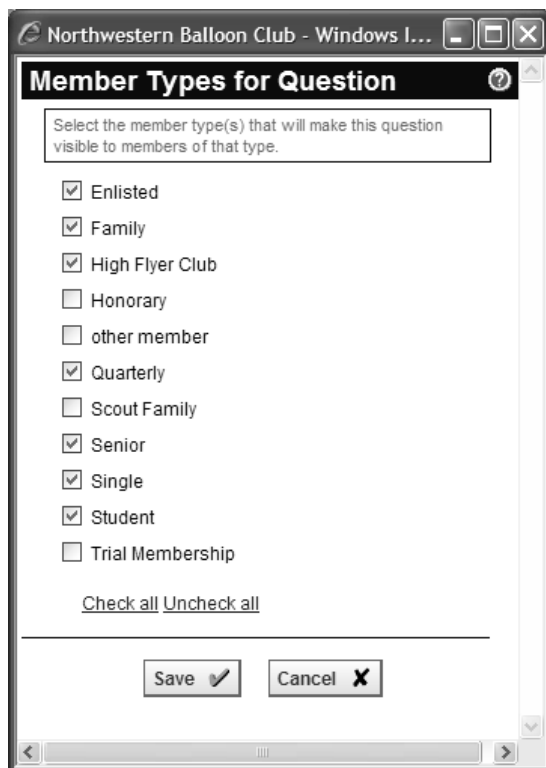


Figure 10.16 – Define Member Types for a Question

For a newly defined question, all member types are checked. Uncheck the member types that should not see this question. Click the **Save** button to save your changes or **Cancel** to close the dialog without saving.

Click **Delete** to remove a Club Question. All answers are also deleted.

Click **Answers** to display a report showing member answers for this question. Two reports are available, one sorted by member last name and the other sorted by answer. The ClubExpress report manager displays these reports, so they are available in PDF, HTML, Word or Excel formats.

Click the **Display Sequence** button to control the order of questions on the new member signup wizard and directory.

Click the **Export Answers** button to generate an export file in CSV format with detailed member information and their answers to all questions. This file is suitable for loading into a spreadsheet like Excel for further analysis.

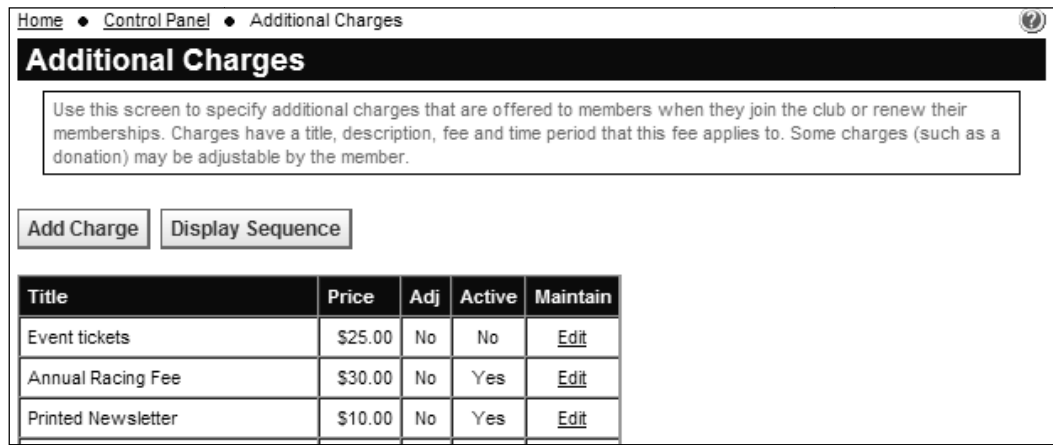
ADDITIONAL CHARGES

ClubExpress allows you to present a list of optional charges when members sign-up or renew their memberships. These can be one-time or periodic fees and are commonly used to sell club merchandise, or a printed newsletter, or fees for a national organization. You can also use this option to solicit a variable donation from a member.

As an admin, if you want to process an additional charge outside a membership signup or renewal, use the miscellaneous charges/credits option in the Member Manager.

When members join or renew, additional charges are shown on a special screen in the new member signup and membership renewal wizards. They can also select the **Optional Additional Charges** choice on their Profile to “purchase” one or more additional charges at any time.

Selecting this option displays the following screen:



Home • Control Panel • Additional Charges

Additional Charges

Use this screen to specify additional charges that are offered to members when they join the club or renew their memberships. Charges have a title, description, fee and time period that this fee applies to. Some charges (such as a donation) may be adjustable by the member.

[Add Charge](#) [Display Sequence](#)

Title	Price	Adj	Active	Maintain
Event tickets	\$25.00	No	No	Edit
Annual Racing Fee	\$30.00	No	Yes	Edit
Printed Newsletter	\$10.00	No	Yes	Edit

Figure 10.17 – Additional Charges

This screen lists each additional charge you have defined. To add a new charge, click the **Add Charge** button. The following popup window is displayed:

Northwestern Balloon Club - Windows Internet Explorer

Add/Edit Charge

Use this screen to add a new charge or modify an existing charge. Specify the title and description for the charge. Price is required unless Adjustable is set to true. The Adjustable option allows the member to modify the charge; it should be used for an item such as a special donation to the club.

*Title

Description

Active

Price Fixed Adjustable
 \$ Max \$3,000.00

Availability New Members Renewals Recurring Charge

Quantity N/A (always 1) Adjustable
 Min. Qty Max. Qty (Max 99)

Financial Account QuickBooks Item Name

Figure 10.18 – Add/Edit an Additional Charge

Specify the title and description of the charge and whether it is currently active or hidden.

The **Price** of the additional charge can be fixed or adjustable. Use the adjustable option for charges such as a donation with a recommended amount that the user can change.

The **Availability** option controls whether the charge is shown to new members, renewals or both. If the **Recurring Charge** option is checked, this charge will be checked whenever the user renews.

The **Quantity** option controls whether the user can change the quantity ordered. Use this option for physical items that members order with their membership, such as a club lapel pin, a car badge, or a T-shirt.

Note that Price and Quantity cannot both be adjustable at the same time.

The **Financial Account** option allows you to select a detail or master account into which Additional Charges revenue should be stored.

QuickBooks

The **QuickBooks Item Name** option allows you to match this additional charge into a QuickBooks item when you export transactions.

Click **Save** or **Cancel** to return to the list of additional charges.

To edit a charge, click the **Edit** link. There is no way to delete a charge because this might create unlinked data in your financial history. Instead, if you no longer want to show a charge, turn off its *Active* flag.

JOINING AGREEMENT

The printed membership forms for some types of organizations include special language that members must agree to before they can join. This is most commonly required if the club or association is involved in potentially dangerous activities, such as scuba diving or mountain biking; this language protects the organization and releases it from liability. It may also be used for a code of ethics or behavior, which members must promise to abide by.

If you require such language, select this option to display the following dialog:

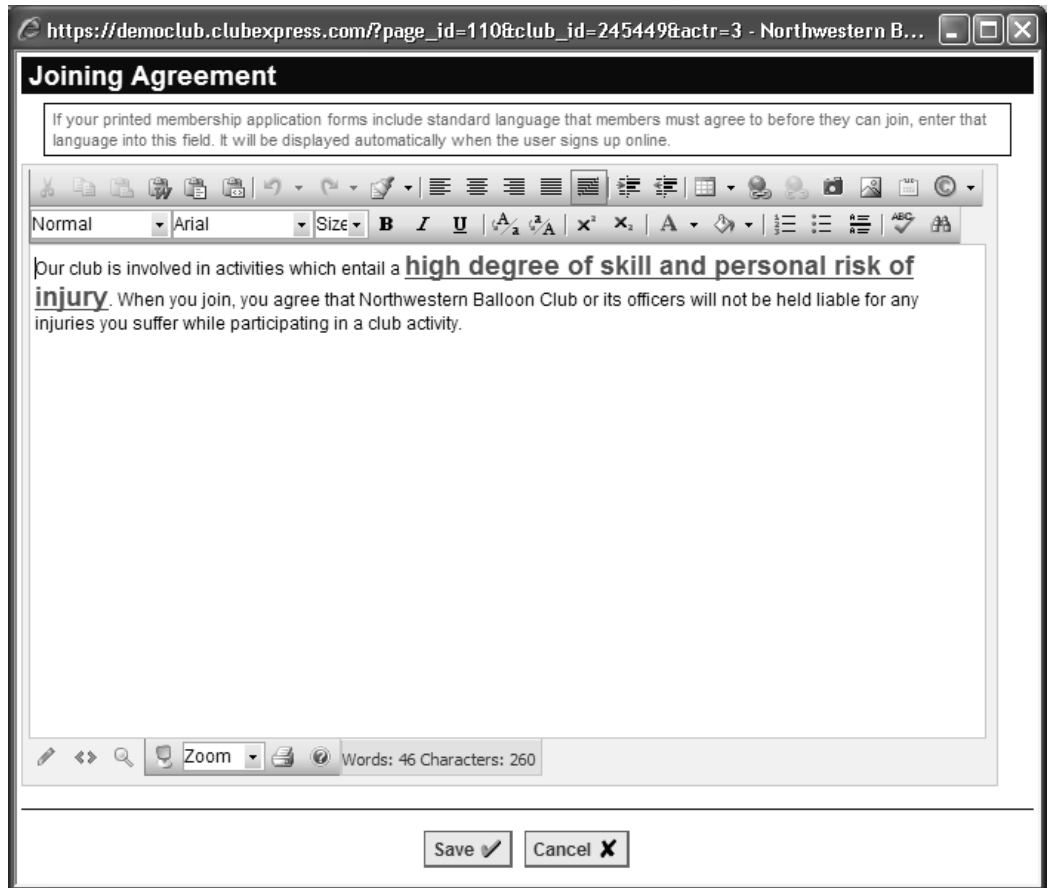


Figure 10.19 – Joining Agreement

The full content editor is available, with all of its formatting capabilities. Click **Save** to save your text and enable the page or **Cancel** to close the dialog without saving.

On the Control Panel – Membership Wizards Setup page check the appropriate options to determine whether the joining agreement page should be shown on the member signup wizard and/or the membership renewal wizard.

EMAILINGS

ClubExpress provides powerful tools that allow administrators to communicate with members via email. Clicking this option displays the following screen:

Home • Control Panel • Emailing

Emailing

This module allows you to send emails to the whole membership or smaller groups of members. If Date Sent is blank, the email has not yet been sent. Sent emails cannot be edited but they can be copied. Click the Add Emailing button to create a new email.

Search For Emailings

Include Archived Emailings

Category: < All Categories > Search

Emailing Categories

Add Emailing

Status	From	Subject	To	Maintain
Draft	Not Defined	Reschedule	Events Committee members	Edit Copy Delete
Draft	Martin D Smith	Test email to see that this is...	Active Members	Edit Copy Delete
Sent on 6/9/2009	Barbara C Jones	one blue balloon	All Members + Secondaries	Edit Copy Archive Reports Delete

Return to Previous Page

Figure 10.20 – Emailings

This screen lists emails previously created and sent. Each email is shown with the subject, sender and recipient information, as well as the status:

- Draft – not yet sent
- Pending on <date> - scheduled to be sent
- Sent on <date>

You can filter by category and optionally display archived emails.

The **Edit** option allows you to modify emails. If the email has not been sent, this option leads to the full editor and send options (described below.) If the email has been sent, this option only allows you to change the category.

Click **Copy** if you want to make a copy of an emailing. This option is especially useful if you create a template email with a standard look and feel. Each time you want to send another email using the template, select the Copy option to copy the template to a new email.

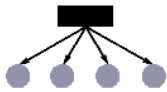
The **Archive** option enables the archive flag. If it's already enabled, the option will say **Unarchive**. Use the **Delete** option to completely remove an email from the list. This option should be used with caution since the deleted emailing cannot be recovered and you lose the audit trail of what has been sent.

The **Reports** choice displays the standard reports dialog with reports showing who received each email and who did not because of a bad email address. Note that these reports will not show any data for emailings sent prior to August, 2007 (approx.) when support for this feature was added to ClubExpress.

Emailing Categories

Emailing categories allow you to organize and filter emailings in different ways (for example, event announcements, membership reminders, monthly blurbs from the president, committee updates, etc.)

Click this button to see a standard ClubExpress category management screen. All options perform their expected functions. The Delete option only appears for categories that have not been used.



If your club or association has subgroups, you can create categories for use by subgroup administrators, allowing subgroup emailings to be organized into their own categories.

New Emailing

Click **Add Emailing** to create a new email. The following popup window is displayed:

New Emailing

This screen allows you to create and send an email to your membership or to your non-member database. Use the "To" field to select the group you wish to contact. The From: field defaults to your email address but can be changed to any address which should receive replies. Click "Ready for Delivery" to save the email and send it immediately. Click "Save as Draft" to save the email without sending it yet; you can return to it later.
 Fields marked * require an entry.

Emailing Category: Select

Format: HTML Plain Text

From Email Address: info@clubexpress.com

From Name: Test Club

To: Non-member database Count

Category: Filter by Category Select Category: Donor

Send: Now On This Date

Subject: Test Email

Options: Set Urgent Flag

Send Test to Myself Save as Draft Ready for Delivery Cancel

Figure 10.21 – New Emailing

Category and Format

Begin by specifying the emailing category for this email from one of the available categories. Next, specify what format should be used for the emailing:

- HTML (the default) gives you full control over fonts, colors, alignment, etc. You can embed images in the email and use the link builder to build links. The complete content editor is available to define the email body.
- Plain Text is text only. No formatting or colors. Links can be included but they must be entered manually or pasted in from the clipboard.

From and To

Your current email address is placed in the **From Email Address**: text box but it can be changed so that the email appears to come from another mailbox. You can also specify a different **From Name**: that the email will appear to be coming from. The default value is the club name, but you can change it to your name or an official title if that will make the email more recognizable.

Emails can be sent to the following:

- Active solo and primary members only;
- All active members, including secondary members;
- Expired solo and primary members only;
- Everyone listed in the database (active + expired);
- Members with a specified membership type;
- Members with a declared Interest;
- Members of a specified committee;
- Members with pending payments;
- Everyone in the non-member database;
- People in a selected non-member database category;
- Members with a specific answer to a club question.



If your club or association has subgroups, an additional option is shown: “Members of a specified level”. Members generally join at the lowest level (chapter). You can send an email to members at any level and the system will aggregate the appropriate list of people. For example, if you select a “district”, the email will be sent to members of all chapters in that district.

Click the **Count** button to see a count of people who will receive the email, who have invalid or unavailable email addresses, or who are declining to receive emails from the club (based on their Contact Info settings.)

Send When

The default is **Now**; when you click the “Ready for Delivery” button, the email will be sent immediately.

If you select **On This Date** and enter a date, the email will be held with a Pending status and will be delivered on the specified date.

Subject, Options and Message

Specify the Subject, message body and whether the Urgent flag should be set. Then click one of the buttons at the bottom of the dialog:

Click **Send Test to Myself** to send a single copy of the message to yourself. This option allows you to see what the message will look like without losing any of the above configuration settings. The email is *not* flagged as having been “sent”.

Click **Save as Draft** to save the email without sending it. This option allows you to further edit an email before sending it, or to create a template email that can be copied and used multiple times.

Click **Ready for Delivery** to send the email based on your Send settings (now or at a future date) and return to the previous screen. You will be asked to confirm this action in case you clicked this button accidentally. If the email is being sent immediately, you will see a results message showing how many emails were sent and how many could not be sent because the email address was bad.

Click **Cancel** to close the window without saving your email. You will be asked to confirm this action in case you clicked this button accidentally.

Notes

Emails sent using this function are fully compliant with the federal CAN-SPAM Act of 2004. A footer explaining who sent the email and how to opt-out is included.

When members click the opt-out link, they are taken to the Login page so that they can log in with their username and password. Once they have done so, they are taken their **Profile – Contact Information** page where they can uncheck the option under their email address to stop receiving general emails from the club. (Note that unchecking this option does not stop official emails from the club, such as renewal and expiration notices. These are always allowed because they pertain to the member’s official relationship with the club.

When non-members click the opt-out link, they are taken to a special **Opt-Out** page that allows them to remove themselves completely from your non-member database.

If an email is sent to an address that proves to be bad, ClubExpress flags it as a bad email address and will not attempt to send further emails to it as long as the flag is in place. The flag is visible wherever email addresses can be edited, so that you can see if an email address needs to be fixed. There is also a Bad Emails Report.

NON-MEMBER DATABASE

ClubExpress allows clubs and associations to maintain a list of contacts separate from the membership database. This list is often used for prospects, local press, local government officials, donors, officials of neighboring or other local clubs, and others who might be interested in the group's activities. When non-members sign up for events or make donations, they are added to this list, as are visitors to the website who click the *"Add me to your mailing list"* option. When you select this option, a screen similar to the following is displayed:

Home • Control Panel • Non-Member Database

Non-Member Database

The Non-Member Database Manager allows you to track people separate from your club's membership database. Clubs use this list to track people or organizations that should be informed about club developments, such as the press and major benefactors. Click "Non-Member Categories" to edit the categories into which entries are sorted; categories can be used to select groups for mailings or emailings. Click "Add Entry" to add a new person or organization to the database. You can also filter the list of current entries for editing or deleting.
[Jump To Member Manager](#)

[Non-Member Categories](#) [Add Entry](#) [Import Non-Members](#)

Show Non-Members For:

Search By: Last Name City State Company
 Category Email ID

Search For: [Search](#)

Search Results (3 records found) [◀ Prev](#) Page 1 of 1 [Next ▶](#)

Name	Company	City	State	Level	Date Added	Maintain
Smith, Jack		Tulsa	OK	Club	9/20/2005	Maintain
Smith, John		Rolling Meadows	IL	Club	9/20/2005	Maintain
Smith, John (12345)	John Smith Company	Anytown	IL	Club	1/10/2009	Maintain

[Return to Previous Page](#)

Figure 10.22 – Non-Member Database Manager

You can search within the non-member database by specifying a search criteria and clicking the **Search** button. If you select State or Category, the Search For field will change to a drop-down list showing defined states or categories.

Besides the Search Results is a number showing the number of matching records found. The list is displayed in pages of 30 records; use the page navigation controls to move from page to page.



If your club or association has subgroups, you will also see a subgroup selector, allowing you to filter the list by non-members belonging to a specific subgroup. The grid is also modified to show the subgroup that each person belongs to.

Non-Member Categories

Clicking this button displays a screen similar to the following:

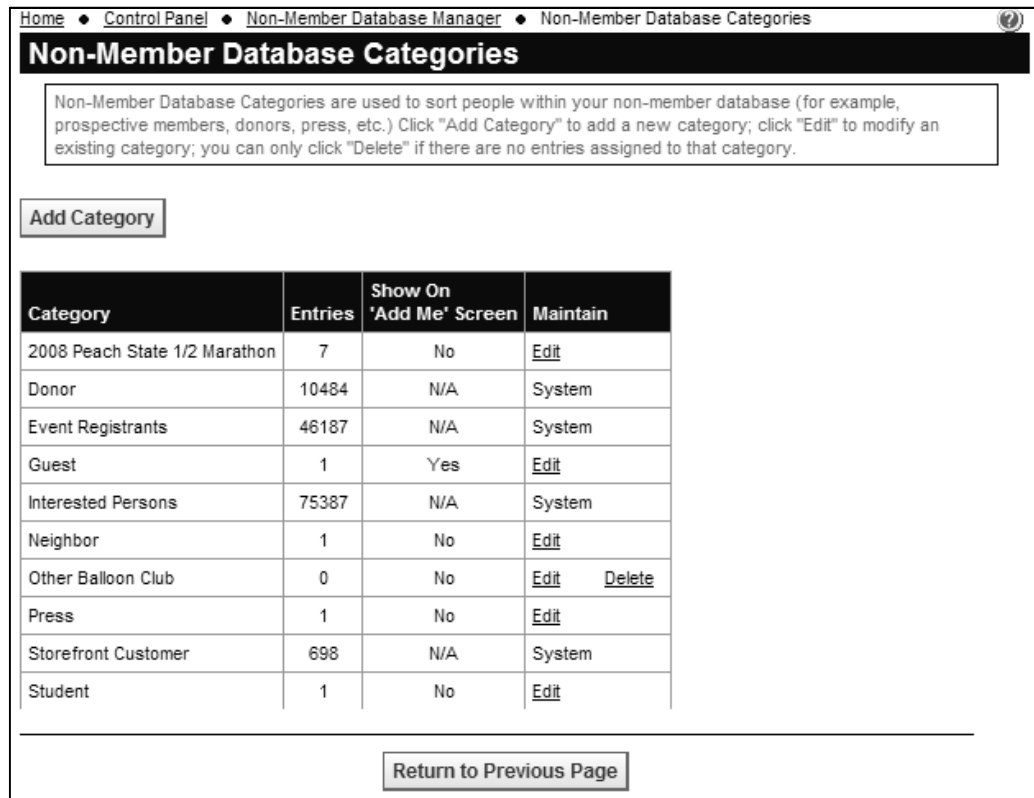


Figure 10.23 – Non-Member Database Categories

There are a number of system categories and you can also add your own by clicking the **Add Category** button. You will see the following screen:

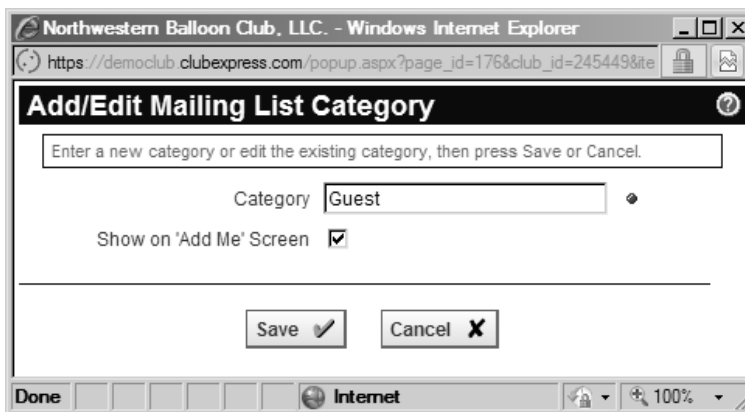


Figure 10.24 – Add/Edit Non-Member Database Category

Enter the category name and specify whether this category should be included on the *Add me to your Mailing List* screen (if enabled). Click **Save** to save your change and return to the Non-Member Database Categories screen, or **Cancel** to return without saving.

Click the **Edit** link to modify an existing category and the **Delete** link to remove a category. (This link will only be displayed if there are no mailing list entries assigned to the category.)

Some categories are maintained by the system and cannot be modified. These are flagged with a “System” tag.

- Donor – for non-members who make a donation using the Donations module, unless a different category has been specified for that fund.
- Event Registrants – for non-members who register for an event, unless a different category has been specified for that event.
- Interested Persons – for non-members who click the *Add me to your mailing list* link.
- Storefront Customer – for non-members who place orders through the club’s E-Commerce storefront.

Add Entry

Clicking the **Add Entry** button displays the following screen:

The screenshot shows a web browser window titled "Northwestern Balloon Club - Windows Internet Explorer". The main content area is a form titled "Add/Edit Non-Member Database Entry". The form contains the following fields and values:

- ID:
- First Name:
- Last Name:
- Title:
- Organization:
- Category:
- Address 1:
- Address 2:
- City:
- State/Province:
- Zip/Postal Code:
- Country: [Show All Countries](#)
- Phone:
- Cell Phone:
- Fax:
- Email Address:
- Notes:

At the bottom of the form are two buttons: "Save" with a checkmark icon and "Cancel" with an 'X' icon.

Figure 10.25 – Add/Edit Non-Member Database Entry

This popup screen allows you to enter the basic contact information for a person in your non-member database. No fields are required on this screen; an individual may only have an email address listed and no physical address, while an organization might not even have a contact's first name/last name. Use the Notes field to enter comments about the individual or organization specified. One category can be specified on this screen. The non-member can be assigned to other categories from the main Admin screen.



If your club or association has subgroups, each non-member entry can be assigned to a specific subgroup at any level.

Click **Save** to save your changes and return to the Non-Member Database Manager. Click **Cancel** to return without saving.

Import Non-Members

Select this option to import a list of contacts into the system. (This button is not available to clubs or associations in setup or trial modes.) You will see the following screen:

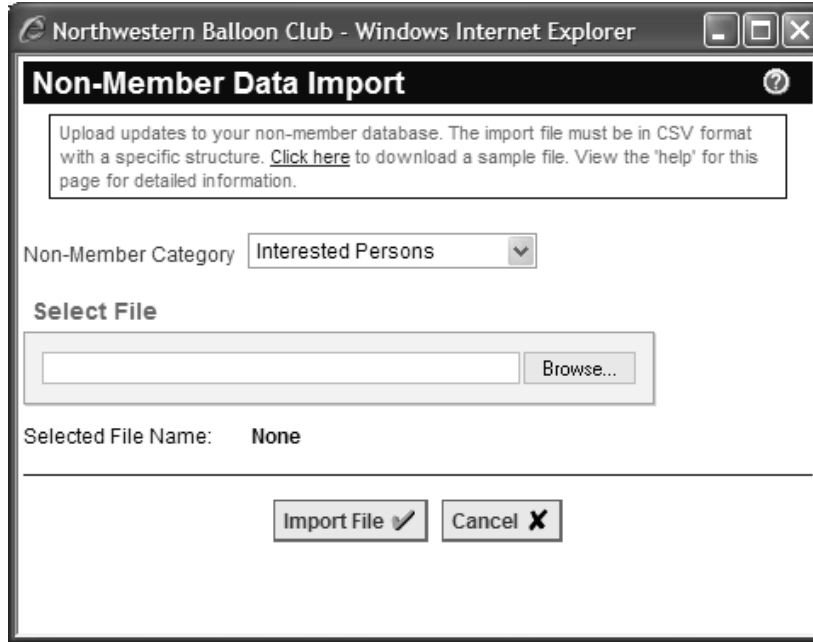


Figure 10.26 – Importing a Non-Member Database

Enter a filename from your local computer. You can also specify the non-member category that should be used for the imported records. Click **Import File** to complete the import, or **Cancel** to close the dialog without importing.

The import file must be in CSV (comma-separated values) format and it must contain the following fields in exactly this order. No additional fields can be added, and none should be skipped. If you don't have data for a specific field leave that column blank.

- Member Number
- First Name
- Last Name
- Address1
- Address2
- City
- State
- Zip
- Country
- Email Address
- Phone Number

- Cell Phone Number
- Work Company
- Title
- Fax Number

The easiest way to create this file is to create a spreadsheet in Microsoft Excel with the specified columns (column names in row 1) and save it as a CSV file. Excel will generate the proper file format.

If you don't have Excel available, please follow these rules to get a successful import:

- Each field must be separated by commas except the last field in each row.
- Fields that might have commas within them must be enclosed in double quotes. This is not necessary for fields that cannot have commas.
- There should be no blank lines at the end of the file.
- The first row is a header line listing the field names shown above.
- Plain ASCII characters work best; special characters will be imported but the results may not be identical to your original data.

Payments

If a non-member has a pending payment you will see a **Payments** link. Click it to display the standard Pending Payment screen.

Maintain

Clicking this link displays the following popup menu:

Edit
Categories
Transaction History
Payment History
Event History
Convert to Member
Merge
Charge/Credit
Log
Delete

Figure 10.27 – Non-Member Database Maintain Options

Select **Edit** to display the Add/Edit Non-Member dialog, described above.

Select **Categories** to display a popup dialog showing the available non-member categories. You can check one or more categories into which this non-member should be placed. Click **Save** to save your changes and close the dialog, or **Cancel** to close the dialog without saving.

Select **Transaction History** to view the transaction history for this member.

Select **Payment History** to view the payment history for this non-member.

Select **Event History** to view the history of events this non-member has registered for.

Select **Convert to Member** to change this non-member entry to a member. You will see the following screen.

The screenshot shows a web browser window titled "Northwestern Balloon Club - Windows Internet Explorer". The main content area displays a dialog box titled "Convert Non-Member". Inside the dialog, there is a text box with the following text: "Convert the selected non-member to a member. Specify the membership type, the expiration date, and the fee. When you select a membership type, the standard expiration date and fee will be entered for you. You may change them if necessary. When saved, if a fee applies, the new member will be marked as 'Pending' and will need to pay the fee before becoming 'Active.' If there is no fee, the new member will be 'Active' immediately." Below this text are several input fields: "First Name" with the value "George", "Last Name" with "Banks", "Email" with "george123@gmail.com", "Member Number" with "456", "Membership Type" with a dropdown menu set to "Single" (with "Single adult membership" listed below it), "Expiration Date" with "7/9/2010" and a calendar icon, and "Membership Fee" with "45.00". At the bottom of the dialog are "OK" and "Cancel" buttons.

Figure 10.28 – Converting a non-member to a member

The first name, last name and email address will already be filled in (if defined.) Specify the member number, member type, expiration date and fee, then click **OK**.

The system will generate a welcome email to the new member as well as a pending transaction. He or she will be invited to log in to complete payment and activate the membership. All prior transactions are carried forward to the new account.

Select **Merge** to merge this non-member record with another member or non-member. The system will convert transactions, payments, event registrations, donations and notes. Use this option to remove duplicate entries. You will see the following dialog

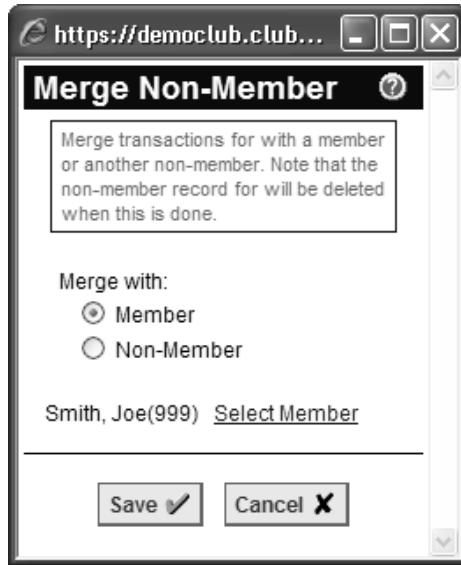


Figure 10.29 – Merge Non-Member

Select Member or Non-Member then click the link to select the destination name into which this member record will be merged. Click **Save** to complete the merge or **Cancel** to close the dialog without merging.

Select **Charge/Credit** to generate a one-time charge or credit for this non-member. You will see the standard Charge/Credit dialog as described above. Charges and credits will appear on the non-member's Pending Payments page.

Select the **Delete** link to remove an existing non-member entry. Note that a non-member record cannot be deleted if it has transactions attached to it.

DOWNLOAD BIO PHOTOS

This Control Panel choice will only appear if you have asked us to enable a special feature that allows members to upload hi-res bio photos. Clicking this choice will download these photos in a single ZIP file, with each file in the zip named using the member name and number.

Hi-res bio photos can be used for a printed membership directory.

Chapter 11 – Control Panel – Club Information

NAME & DESCRIPTION

Click **Name & Description** to display the following screen:

Home • Control Panel • Name and Description

Name and Description

Update the club's official names, not-for-profit status and the description of the club's purpose.

Club Data

Club Name ◆

The commonly used public club name.

Short Name ◆

Caution: Do not change the Short Name in the middle of the day or your website will become unavailable until tomorrow morning. If you need to change the Short Name, do it as the last task before you finish for the day.

Year Founded ◆

Purpose ◆

RBC

Max 200 characters - 170 characters left

Brief description of the club's purpose. This description will also help search engines to find your site.

Official Address (shown on Contact Us page)

Address ◆

City ◆

State/Province ◆

Zip/Postal Code ◆

Country ◆ [Show All Countries](#)

Mailing Address for Payments (shown on Invoices)

Address ◆

City ◆

State/Province ◆

Zip/Postal Code ◆

Country ◆ [Show All Countries](#)

Figure 11.1a – Names, Description and Addresses

Geo Coding Address (used for mapping)

Address

City

State/Province

Zip/Postal Code

Country [Show All Countries](#)

Show Mapquest link on Contact Us Page

Phone, Fax, & Email

Enter the phone, fax, and/or email address for general inquiries.

Phone

Fax

Email

Legal Info

Legal Name

if the legal name of your club is different from the commonly used club name, enter it here.

State

State in which the club is incorporated

Not-for-Profit Yes No

Does the club have not-for-profit status according to section 501(c)(3) of the IRS tax code?

Figure 11.1b – One More Address, Phone, Fax, Email and Legal Info

This screen allows you to enter basic information about your organization:

- Official name
- Short Name (up to 18 chars, no spaces)
- Year founded
- Purpose
- Official organization phone, fax and email
- Legal name, state of incorporation and tax status, if appropriate.

You can also enter up to three addresses:

- The “Official” address for the club, where general correspondence should be mailed.
- A separate address used on invoices, where checks and other financial correspondence should be mailed.
- A geocoding “mapping” address which will appear when the MapQuest link on the Contact Us page is clicked. This might be the address of a clubhouse or a facility where the club regularly meets. You also have the option of showing or hiding this MapQuest link.

Use the **Copy Address** buttons to replicate an address across all three fields.

ClubExpress uses this information in a number of ways. The Short Name provides an alternative way for members to access your club or association through the Internet. Some organizations own their own Internet domain, for example, ChicagoCorvettes.org. Once this domain is configured in ClubExpress (see Chapter 12 below), it can be used to access your ClubExpress website. However, if you have configured *ChicagoCorvettes* as your Short Name, the following Internet domain name can also be used to access your organization: chicagocorvettes.clubexpress.com. This feature especially supports clubs or associations that do not own their own domains.

Important Note: the Short Name cannot be changed while your website is in use. If you need to change it, do so at the very end of the evening, before finishing for the night. After the system is reset in the middle of the night, the new Short Name will be in effect.

The Purpose field is automatically placed in the HTML header of all public pages. Many Internet search engines read this header and use it to index your club or association, so that people searching for a specific type of club can find it. We recommend that you complete this field as fully as possible, listing the purpose of your organization as well as the areas from which you draw members. Use complete sentences rather than a list of keywords, but try to include as many keywords as possible that describe your organization.

(You should also specify keywords using the Website Keywords field on the **Control Panel – Website Options** screen.)

ADMINISTRATORS / COORDINATORS

ClubExpress supports *nine* separate levels of security; this screen allows you to specify the top two levels. See below for information on specifying the lower, more granular levels.

In the ClubExpress model, Administrators have complete access to the Control Panel and all of its functionality, while Coordinators manage one or more content or administrative modules only. Each club or association must have at least one Administrator who is defined when the organization's account is first established.

Selecting this menu choice displays a screen similar to the following:

Home • Control Panel • Administrators and Coordinators

Administrators and Coordinators

Using this screen, you can define other association administrators like yourself. Click "Add Administrator" to add a member. Click the "Remove" link to remove a member. The system will enforce at least one member in the list.

Administrators

Add Administrator

Administrator	Maintain
Martin D Smith (3)	

Coordinators

Add Coordinator

View By Function

Coordinator	Maintain
Barry Bonds (192)	Functions Remove
Barbara C Jones (2)	Functions Remove
Barb Rad (169)	Functions Remove
John Smith (194)	Functions Remove

Return to Previous Page

Figure 11.2 – Administrators and Coordinators

The top part of the screen allows you to define administrators. Click **Add Administrator** to specify that a member should be treated as an administrator. The standard Select Member dialog will be displayed to allow you to select a member. Only Active members are shown in the list.

Click the **Remove** link to remove an administrator. This option is not available if there is only one person remaining in the list.

Coordinators

The lower part of the screen lists coordinators with access to one or more administrative functions. Click **Add Coordinator** and the following screen is displayed:

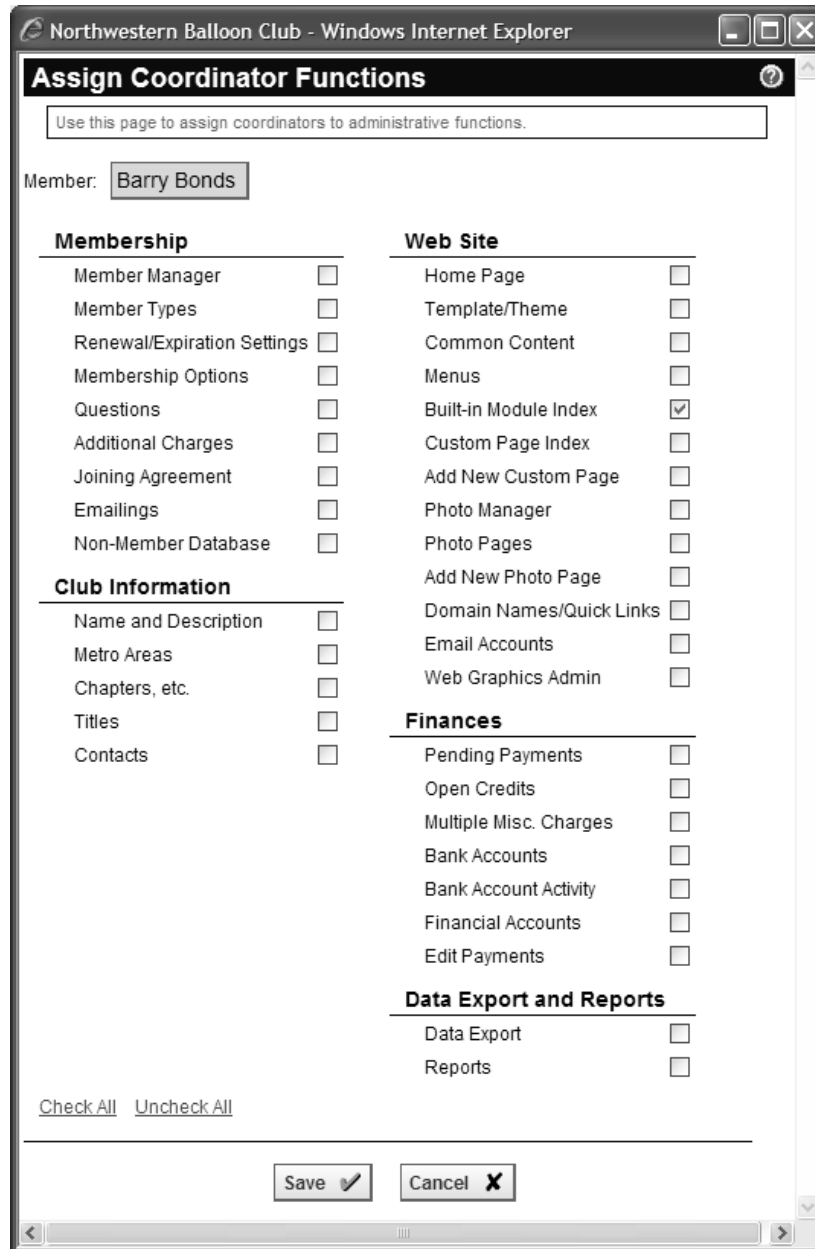


Figure 11.3 – Add Coordinator

This screen shows the various Control Panel functions that can be assigned to a coordinator. It's used when your club or association has assigned someone to help with a specific function, such as the Member Manager, but you don't want to give that person access to every option on the Control Panel.

Select the member name at the top, then check the options to which this member should have access. Click **Save** to save your changes and return to the Administrators / Coordinators screen, or **Cancel** to return without saving.

Two options on this screen deserve special mention. **Add New Custom Page** and **Add New Photo Page** allow you to give coordinators the ability to add new custom and photo pages themselves. When these options are used, the current member is also automatically made a coordinator for the new page, so that he or she can edit this page from his or her own coordinator control panel.

Clicking the **Functions** link displays the same screen in edit mode. You can also click **Remove** to remove all functions from a user, thereby removing him or her from the list.

Clicking the **View By Function** button changes from a Coordinator → Function view to a Function → Coordinator view. The following screen is shown:

Coordinators		
Category	Function	Maintain
Membership	Member Manager	Members Remove
Membership	Member Types	Members Remove
Membership	Renewal/Expiration Settings	Members Remove
Membership	Options	Members Remove
Membership	Additional Charges	Members Remove
Membership	Joining Agreement	Members Remove
Membership	Emailings	Members Remove
Membership	Non-Member Database	Members Remove
Club Information	Name and Description	Members Remove
Club Information	Metro Areas	Members Remove

[View By Member](#)

Figure 11.4 – Function → Coordinator view

This screen lists each function within the Control Panel categories. Click the **Members** link to display members assigned to coordinate that function. Click **Remove** to remove all members from that function.

Click the **View By Member** button to switch back to the other view.

Other Security Levels

To assign coordinator rights to a single module (for example, the event calendar, documents, committees, news, forums, etc.) select **Control Panel – Built-in Module Index**. Click the **Coordinators** link beside a module name to add a coordinator for just that module. For example, your newsletter editor might be a coordinator for the Documents module so that he or she can upload new issues of the newsletter as they are published. See page 194.

Note: for the event calendar, this option grants coordinator rights to the whole calendar, including all events. You can also specify a coordinator for just one event (as part of the event definition, on the **Basic Info** page.) This person will then have coordinator rights to that event only. See page 351 for more info.

Also, for discussion forums, this option grants coordinator rights to the whole module, including all forums. You can also specify a moderator for just one forum (as part of the Forum definition, click the **Members** option, then the **Edit** link.) This person will then have moderator rights to that forum only. See page 431 for more info.

To assign coordinator rights to a single static web page, select **Control Panel – Custom Page Index**. Click the **Search** button to see a list of pages, then click the **Coordinators** link beside a page to add a coordinator for just that page. For example, if your association has a special page on student programs, the volunteer who manages these programs might be a coordinator for this page. See page 176.

To assign coordinator rights to a single photo page, select **Control Panel – Photo Pages**. Click the **Search** button to see a list of pages, then click the **Coordinators** link beside a page to add a coordinator for just that page. See page 210.



If your club or association supports chapters, districts and regions, you can assign administrators at any of these levels. Go to **Control Panel – Chapters, etc.** (See page 176 for more info.) Right click on a chapter, district or region name and select the **Administrators** option to specify an administrator for just that subgroup. Subgroup admins have access to the following functions, but limited automatically to just the members in their subgroup:

- Member Manager
- Non-Member Database
- Emailings
- Custom Page Index
- Reports
- Data Exports
- Committees
- Event Calendar

METRO AREAS

For national clubs, select this option to define general areas where meetings are held, separate from the formal chapters that may exist within your club or association. You will see a screen similar to the following:

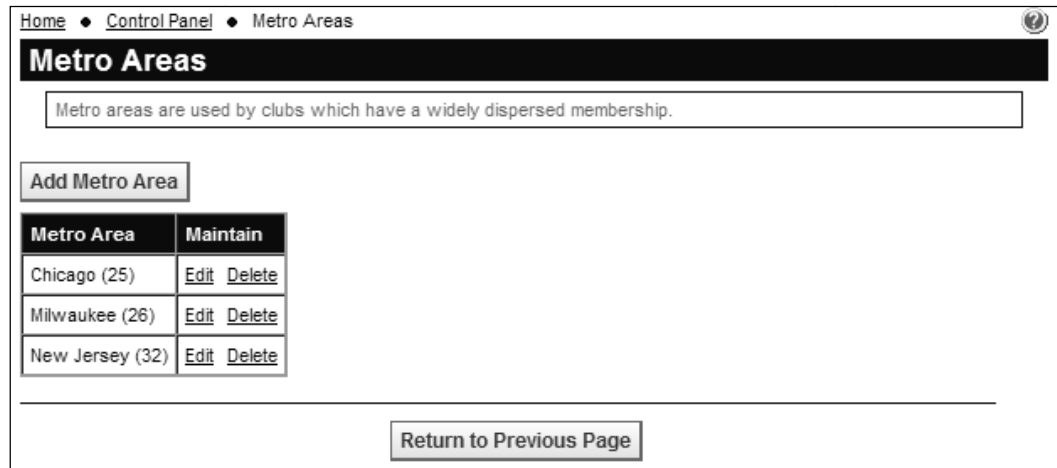


Figure 11.5 – Metro Area Administration

This screen lists the metro areas defined. Click **Add Metro Area** to define a new area. You will see the following screen:

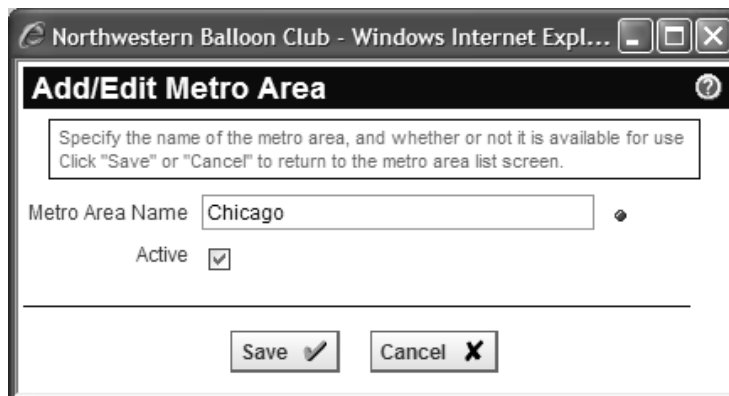


Figure 11.6 – Add/Edit Metro Area

Enter the metro area and whether it is active or not and click **Save** to return to the list. Or click **Cancel** to cancel without saving.

Metro areas can be edited or deleted at any time.

The ID numbers listed after each metro area can be used to preload the event calendar module with a specified area. See page 384 for more information.

SUBSCRIPTION AGREEMENT

Click **Subscription Agreement** to display the following screen:



Figure 11.7 – Agreement

This screen displays the Subscription Agreement that you agreed to when you signed up for ClubExpress.

CHAPTERS, ETC.



If your organization has subgroups (chapters, districts, regions, etc.), this function allows you to define the hierarchy and properties of each subgroup.

ClubExpress supports up to three levels of subgroups below the parent club, for example, “chapters” grouped into “districts” which in turn are grouped into “regions”. You can change the keywords used at each level. When you select this option, you will see a screen similar to the following:

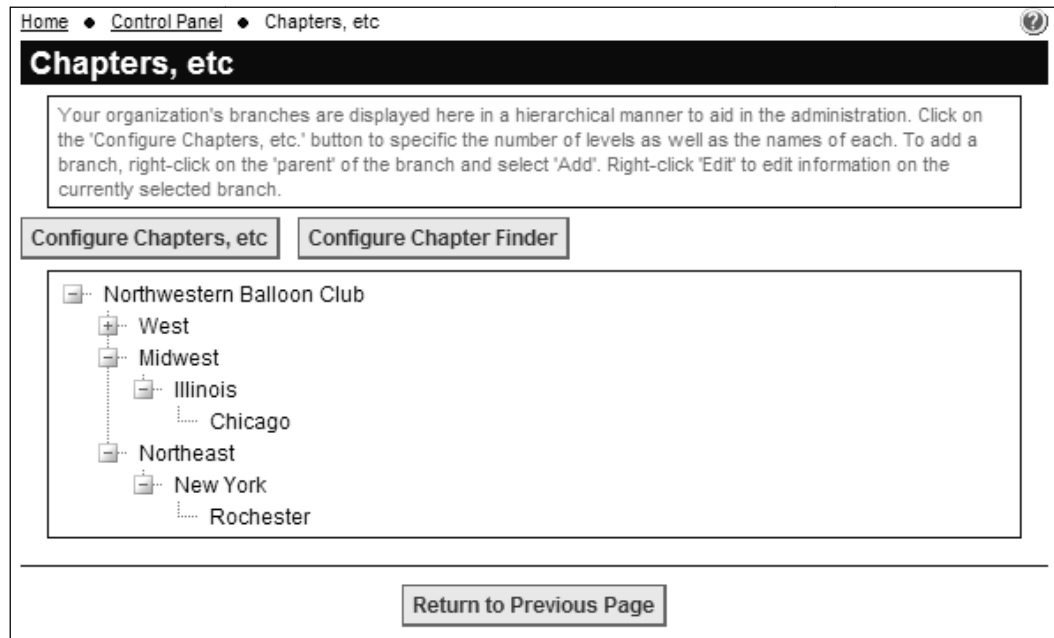


Figure 11.8 – Chapters, Districts and Regions

This is a “tree” diagram showing the hierarchy of subgroups. Click the [+] symbol to expand a branch of the tree or the [-] to collapse a branch. Right click on a subgroup name for a list of options:

- Select **Add <subgroup>** to create a new subgroup below the clicked one.
- Select **Edit** to edit the current subgroup
- Select **Administrators** to define subgroup administrators with rights to this group and its members only.
- Select **Delete** to remove this subgroup. This can only be done if there are no subgroups below this one.
- Select **Edit Membership Fees** to modify the fees charged by this subgroup. This option will only appear if you allow regions, districts and chapters to customize the fees they charge.

Configure Chapters, etc.

Click the button to see the following configuration screen:

Figure 11.9 – Configuring Chapters, etc.

Begin by specifying how many levels in your organization. Select “No” to completely turn off support for chapters. Once you have defined the number of levels, select the appropriate keywords for each level from the drop-down lists.

In the Additional Options specify whether subgroup admins should be able to edit member information or whether they have read-only access. This option primarily affects the Control Panel – Member Manager and Profile screens. Some clubs and associations have a central office with staff who can help members update their information, and local chapter or district admins should not be editing this information.

You can also specify whether subgroup admins can view financial information, including member transaction and payment histories, reports and data exports.

Click **Save** to save your changes and return to the previous screen, or **Cancel** to return without saving.

Configure Chapter Finder

Click this button to configure how the Chapter Finder module should behave. You will see a screen similar to the following:

Home • Control Panel • Chapters, etc • Chapter Finder Options

Chapter Finder Options

Use this page to set up how you would like your 'chapter' finder to appear to users. Select whether to use the built-in map of the US, a custom map, or no map at all (in which case links to the highest level subgroups will display). You can also specify if buttons to display non-US 'chapters' and/or top level subgroups should appear. If you are using a custom map, make sure it is sized correctly for the page before uploading it here. There are additional options on this page if using a custom map, such as whether or not the map is clickable. Finally, select which data (such as address, phone, email, etc) on each subgroup.

Do not show a map
 Use the built-in US map (clicks based on state)
 Use the following map

Show option to display non-US chapters
 Include option to display all top level subgroups

For each subgroup, show:

- Address
- Phone and Fax
- Separate Website
- Email Address
- Contact Person Name and Title
- Link to a Custom Web Page
- Link to Upcoming Events

Figure 11.10a – Configure Chapter Finder

The first setting is to define the map to be displayed, from these options:

- Do not show a map. The module will open with a list of the top level subgroups and users will drill into each level to find the chapter closest to them.
- Use the built-in US map, where you can click a state to view chapters in that state;
- Use a custom map supplied by you.

Home • Chapter Finder • Chapters, etc • Chapter Finder Options

Chapter Finder Options


Use this page to set up how you would like your 'chapter' finder to appear to users. Select whether to use the built-in map of the US, a custom map, or no map at all (in which case links to the highest level subgroups will display. You can also specify if buttons to display non-US 'chapters' and/or top level subgroups should appear. If you are using a custom map, make sure it is sized correctly for the page before uploading it here. There are additional options on this page if using a custom map, such as whether or not the map is clickable. Finally, select which data (such as address, phone, email, etc) on each subgroup.

Do not show a map
 Use the built-in US map (clicks based on state)
 Use the following map

C:\Documents and Settings\Registered User\My Dc


Selected File Name: **USCanadaMap.jpg**

Preview



Show by hierarchy (no clicking on the map)
 Use image map

Note: This option is recommended for advanced users who have an understanding of HTML and image maps. Paste the image map code in the area below (For further information on the format, click on the question mark icon below). After pasting the image map code, select the level that each area corresponds to.

Paste Image Map code here 

```

<AREA SHAPE="POLY" COORDS= "0,0, 26,0, 48,41, 74,67,
88,90, 89,111, 146,192, 146,203, 88,229, 82,250, 84,269,
133,289, 143,283, 162,288, 181,287, 210,279, 210,399, 0,399,
0,0" href="#" onclick="submitMap('1');">
<AREA SHAPE="POLY" COORDS= "26,0, 48,41, 74,67, 88,90,
89,111, 146,192, 221,192, 259,171, 279,171, 287,152,
    
```

What level of detail is defined by this image map

Figure 11.10b – Configure Chapter Finder – Custom Map

When you select the last option, additional fields will appear. Select a JPG or GIF file from your local hard disk to upload as the custom map. It will appear in the Preview window.

Some clubs have a map that is designed to be clicked to show subgroups in the clicked area (for example, chapters.) Other clubs have a map that cannot be clicked. Select the appropriate option. If you want to use an image map, additional fields will appear.

About Custom Image Maps

An HTML image map has a specific format. There are numerous sites and guides on the Internet for creating image maps. You can also find freeware or very low cost tools that allow you to open an image map and then to click the image in sequence to generate the necessary image map code. (Some cleanup will be required to put this code into a format that ClubExpress recognizes.)

Generally, you will define a series of areas, either rectangles, circles or (most commonly) irregular polygons, which delimit closed areas, inside of which a click translates into a selection. For example:

```
<map name="usa">
  <area shape="poly" coords="400,120,400,240,600,240,400,240"
        href="#" onclick=submitmap('1');">
  <area shape="poly" coords="400,240,400,300,600,300,600,240"
        href="#" onclick=submitmap('2');">
</map>
```

Coordinates are listed as X,Y pairs, reading in pixels from the top-left corner of the image. So this example defines two rectangles, one under the other. Clicking in the top rectangle sends the value of 1 to the system; clicking in the bottom one sends the value of 2. (Below you will see how to link chapters to these code numbers.)

When pasting an image map into ClubExpress, leave off the <map> and </map> tags and include just the <area> tags, with all of the attributes listed. You can use any of the shape options. Each area must submit a value to the system although the values do not need to be unique. Be very careful with the various formatting characters, including single quotes, semi-colons and double-quotes.

You also need to specify what level of detail is defined by your custom map, for example, your club's districts. This will determine where you enter the code numbers that match to a click on the map.

Additional Options

If you have chapters outside the map area, you can optionally display a special button to show non-US chapters. If you check this option, you need to encode these chapters with a special ID; specify this ID in the field provided.

You can also optionally include a button that will display all top-level subgroups (such as your regions.) This will show users the hierarchy independent of a map and allow them to drill through this hierarchy.

Finally, you can control what information to show for each subgroup from the following list:

- Address
- Phone and Fax
- A link to a separate website if one exists
- The email address of a subgroup contact
- A contact person for this subgroup and his or her title
- A link to a custom web page on your club website for this subgroup
- A link to display the event calendar pre-filtered to show events for this subgroup.

Click **Save** to save your changes and return to the main Chapters admin screen, or **Cancel** to return without saving.

Adding Subgroups

Right click on your club or association name to add a subgroup at the highest level (for example, a “region”.) Right click on a subgroup to add a subgroup below that one, down to as many levels as you defined on the Configure screen. (This option is not available at the lowest level.) When you select the appropriate **Add...** option, you will see the following screen:

Add/Edit District

This screen allows you to add or edit a district. Specify the district number and name [as well as the region and/or district into which that keyword is assigned]. Then specify the district's contact information.

District Name

This is a under

District Number

Enter the district's official mailing address

Address

City

State/Province

Zip/Postal Code

Country

Enter telephone and fax number, and an email address for general inquiries.

Web Site

Phone

Fax

Email

Please enter the official chapter contact.

Contact Name

Contact Title

Figure 11.11 – Adding a Subgroup

Use this dialog to specify the properties of the subgroup, including its address, website, phone and primary contact information. You can also use the “This is a...” option to change its position in the hierarchy. Click **Save** to save your changes and return to the previous screen, or **Cancel** to return without saving.

If you specified your own map with an image map, you will see an additional option on the popup form above, at the level you specified.

https://democlub.clubexpress.com/?page_id=382&club_id...

Add/Edit Chapter

This screen allows you to add or edit a chapter. Specify the chapter number and name [as well as the region and/or district into which that keyword is assigned]. Then specify the chapter's contact information.

Chapter Name

This is a under

Chapter Number Image Map ID

Figure 11.12 – Specifying an Image Map ID

Enter the number corresponding to the area on the map where this chapter is located. When this area is clicked, all chapters with its number will be displayed.

Edit

Select this option to modify the saved information for an existing subgroup.

Administrators

Select this option to define administrators for this subgroup. You will see a dialog similar to the following:



Figure 11.13 – Subgroup Administrators

Click **Add Administrator** to select a member from the list. Click the **Remove** link to remove an administrator from the list.

Subgroup administrators see a special Control Panel with limited options. Each option will show only information on the subgroup(s) managed by this administrator. For example, if one person manages two chapters and a district, he or she will see the members of these chapters and the district in the member manager, all committees belonging to any of these chapters or the district, same for events, documents, custom web pages, etc.

Delete

Select this option to delete a subgroup. This operation can only be completed if the subgroup in question has no subgroups below it. For example, you cannot delete a district until the chapters within that district have been assigned to other districts.

Edit Membership Fees

On the Control Panel – Member Types – Add/Edit page, you can configure whether the subgroup fees can be different for that member type. For some member types, the fees might be fixed at that level but for other types, you might allow a chapter or district to specify different fees. Select this option to see a screen similar to the following:

https://democlub.clubexpress.com/?page_id=...

Fee Customization

Chapter: San Francisco

This screen allows you to set local fees for your member types.

Member Type	Member Fee	
	Default	Local
Couple	No Fee	No Fee
Family	10.00	15.00
Honorary	No Fee	No Fee
Senior	No Fee	No Fee
Single	No Fee	No Fee
Single - 2 Yr	No Fee	No Fee
Student	No Fee	No Fee
Trial Membership	No Fee	No Fee

Save ✓ Cancel ✕

Figure 11.14 – Defining Subgroup-specific Member Fees

In the example above for the San Francisco chapter, only the “Family” membership can be customized. You can see the default fee and there is a field to specify a different fee for this chapter.

Click **Save** to save your changes and return to the Chapter hierarchy, or **Cancel** to return without saving.

TITLES

Every club and association has official titles defined in its constitution or bylaws, or used in committees. Some positions are members of the Board of Directors while others fill specific roles in your organization, for example, in judging at events or in producing the newsletter. Every title should be on this list; you can then select specific titles to be on committees or listed as official organization contacts. This function allows you to define these titles and to assign specific capabilities to selected titles.

Click **Titles** to display a screen similar to the following:

Home • Control Panel • Titles

Titles

Specify the titles used in your club. Most clubs have standard titles such as President, Membership Vice President, Financial Vice President, etc. Some clubs have titles which are highly specific to the hobby or interest supported. You should include committee titles in this list. For each title, you can also specify whether it will be included on the Contact Us page, which is normally available to non-members.

[Add Title](#) [Display Sequence](#)

Title	Pres.	Memb. Dir.	Trea.	Web.	Email	Maintain
President	Yes	No	No	No	msmith@balloons.com	Edit Delete
VP Membership	No	Yes	No	No		Edit Delete
VP Finances	No	No	Yes	No		Edit Delete
VP Safety	No	No	No	No		Edit Delete
Webmaster	No	No	No	Yes		Edit Delete
Board Member	No	No	No	No		Edit Delete
Committee Member	No	No	No	No		Edit Delete
Newsletter Editor	No	No	No	No		Edit Delete

[Return to Previous Page](#)

Figure 11.15 – Titles

Columns in this grid show whether a title is assigned specific roles within the organization and if the title is assigned an email address.

Click **Add Title** to add a title, the following popup window will be displayed:

Figure 11.16 – Add/Edit Title

In addition to the title, some clubs have special email addresses assigned to a title. Specify that address in the appropriate field. This screen also prompts for four specific positions, the group's:

- president
- membership director
- treasurer or financial VP
- webmaster

The system uses these official roles to put the correct name and title in various emails that it sends out. For example, renewal notices include the membership director's contact information and are "signed" by the person assigned to the president's role.

Click **Save** or **Cancel** to close the window and return to the Titles list.

Click the **Edit** link to edit an existing title and the **Delete** link to delete a title. Click **Display Sequence** to change the order in which titles are listed.

CONTACTS

Click **Contacts** to display the following screen:

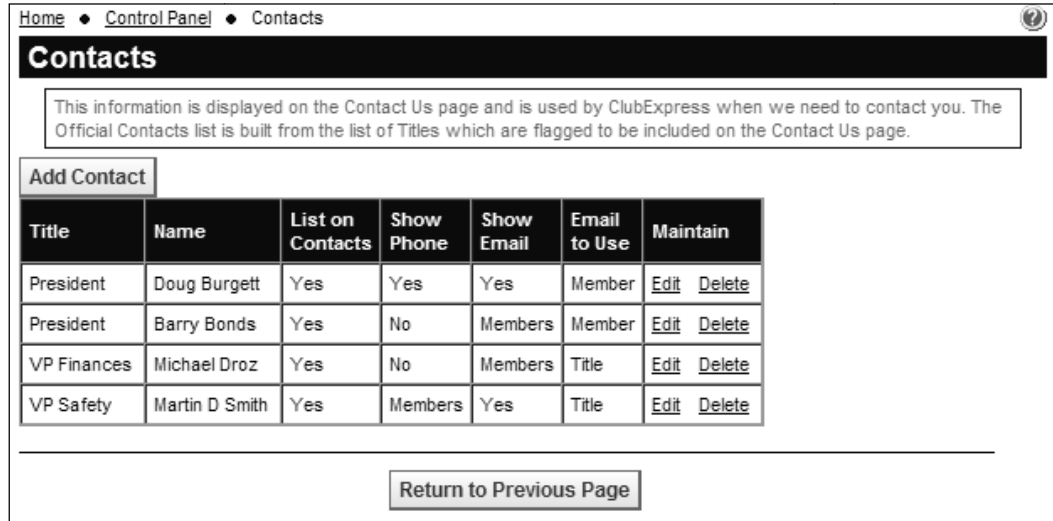


Figure 11.17 – Contacts

This screen allows you to assign people to titles, determine if this contact will be shown on the Contact Us page (if this module is enabled) and specify what will be shown. Click **Add Contact** to display a screen similar to the following

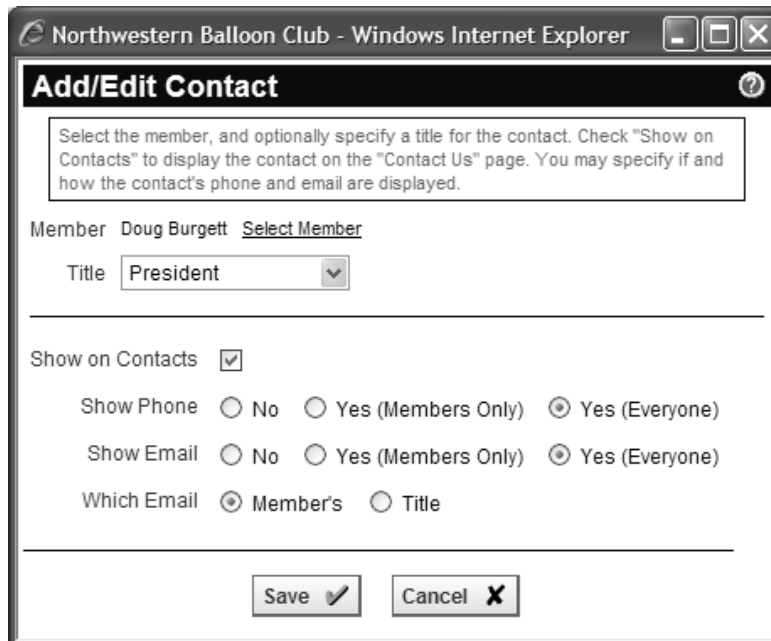


Figure 11.18 – Contact Add/Edit

Begin by selecting a title from the drop-down list. Then click **Select Member** to display the standard member selector and assign a member to this title. Even if they will not be shown on the Contact Us page, you should assign people to the four defined roles (president, membership director, treasurer and webmaster), so that ClubExpress can use these people for official purposes.

Check the **Show on Contacts** option to display this title and name on the Contact Us module. You can also specify whether the phone and email address should be shown and to whom.

Finally, if your club has club-level email addresses and these were assigned to specific titles, select which email address should be shown, either the member's personal email address or the club one.

Click **Save** to save your changes and return to the main Contacts screen, or **Cancel** to return without saving.

CLUB OPTIONS

Selecting this option displays the following screen:

Home • Control Panel • Association Options

Association Options

This screen lists other configuration options for your organization.

Keyword for your organization: Association

Keyword for member's organization (in contact information): Company

Keyword for a secondary member: Business Member

Keyword for a tertiary member: Associate Member

Track required attendance: Yes No

Number of meetings per year: 13

Save Cancel

Figure 11.19 – Club Options

This screen has the following options:

- Specify the keyword for your organization: club (default), association, society, chamber, fraternity, institute, etc.
- Specify the keyword to use for a member's organization or company on their Contact Information screen.
- Specify the keyword to use for secondary members (if defined): family, associate, business, etc.
- Specify the keyword to use for tertiary members (if defined): child, coworker, etc.
- Does your club or association track required attendance? Many community service clubs such as Rotary, Lions, and Exchange require members to attend a minimum number of meetings each year.
 - If so, specify how many meetings a member must attend each year. In the event calendar module, you can optionally track attendance for each event and also define whether that event is eligible for meeting attendance credit.

Click **Save** or **Cancel** to return to the Control Panel.

Chapter 12 – Control Panel – Website

HOME PAGE

Select this option to jump to the Home Page Designer in edit mode. The designer is described in detail in Chapter 17 – Home Page Designer.

TEMPLATE / THEME

A template is the overall arrangement of a typical page, which includes the location and configuration of the page header (usually at the top!), the Login/Profile panel, the menu, the content area and the footer (usually at the bottom!) ClubExpress ships with a number of built-in templates and you can change the current template at any time.

A theme is the scheme of graphics, text font and color, borders, padding, margins, highlights, and other elements that determine the look of the site. Each template has its own collection of themes; once you have selected a template the list of available themes will change.

Click **Template and Theme** to modify the look and feel of your site. The following popup window will be displayed:

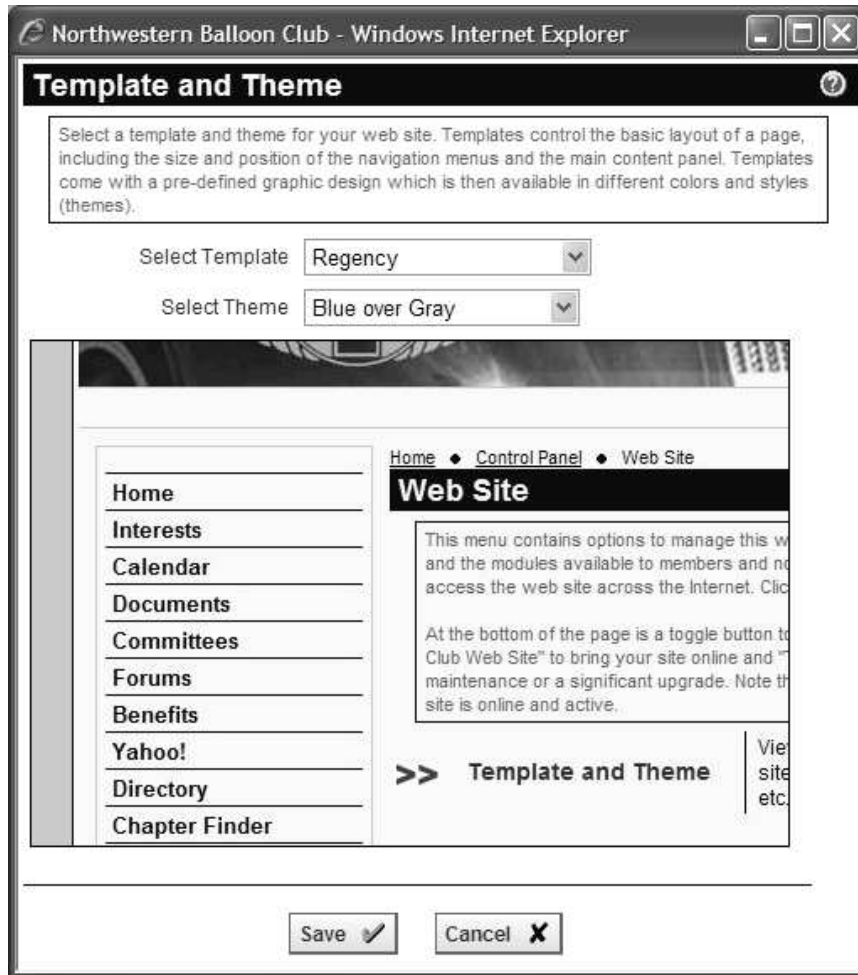


Figure 12.1 – Template and Theme

Select a template and then a theme to see a preview screen of the website using this combination. Click **Save** to save your choice; the new combination takes effect immediately. Click **Cancel** if you don't wish to make a change.

Custom Templates and Themes

ClubExpress also supports custom templates and themes that are for one club or association only, or even for a family of clubs or associations. If you want a fully customized design (perhaps to match an existing website), please contact us for more information. There is an additional one-time fee for this service.

COMMON CONTENT

This module allows you to edit content that is common to every page, including the Page Header and other content boxes. Some templates contain more common content areas than others. Selecting this option displays the following screen:

Home • [Control Panel](#) • Common Content

Common Content

This screen allows you to update the various content areas or panels which appear on all screens of the template. One of these panels is the page header; other areas may be below the page header and under a vertically oriented menu. Click "Create" to add content to an empty content panel. Click "Activate" to activate a content panel, making it visible; click "De-activate" to hide a content panel. You can use this feature for example to add seasonal content to your pages. "Edit" and "Delete" perform the expected functions.

Content Box	Status	Maintain
Page Header	Active	Edit
Under Menu <i>Description: Appears under the menu on the left side of the page</i> <i>Recommended Width: About 150 - 200 pixels, depending on the width of your menu</i> <i>Recommended Height: Any height - may stretch page height</i>	Active	Edit De-activate Delete

[Return to Previous Page](#)

Figure 12.2 – Common Content Administration

Page Header

The Page Header appears at or near the top of every page. It usually contains your organization name and logo, and may contain other graphics or text to highlight your group's benefits and achievements. The specific layout and capabilities of the page header vary by template. The following is a general example, but the actual screen may differ slightly based on your selection in the prior menu choice.

Clicking **Edit Page Header** displays the following popup window:

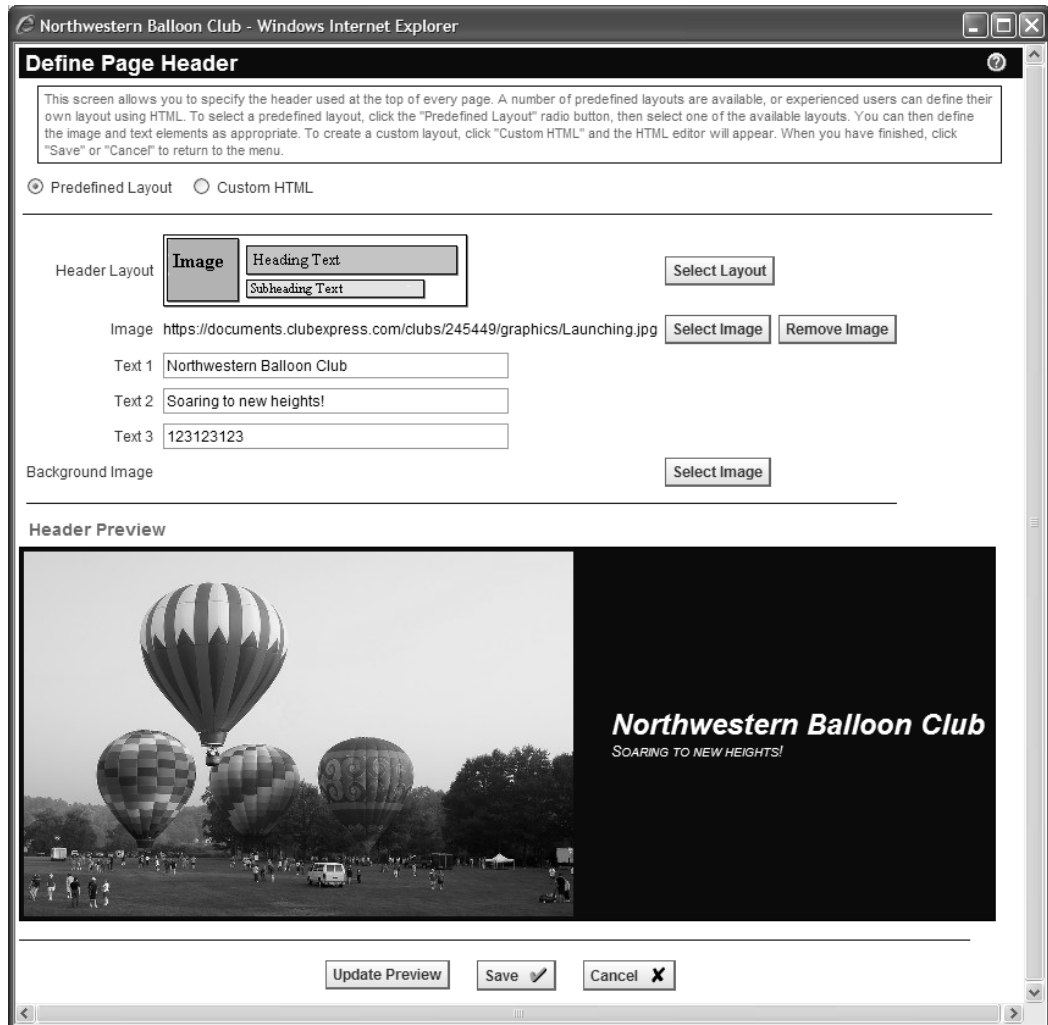


Figure 12.3 – Edit Page Header

ClubExpress supports predefined layouts and fully customized layouts for more experienced users. The above screen shows the Predefined layout options. When you click on Custom HTML, the built-in HTML editor will be displayed and you may add any combination of text and graphics that are appropriate for a page header. (Remember to limit the height so that the header does not dominate every page.) For more information on the built-in content editor, see Chapter 16.

Predefined header layouts comprise different combinations of images, heading text and subheading text. Click the **Select Layout** button to display another popup window of the built-in layouts. In this window:

- Light blue is an image;
- Green is the main page header;
- Yellow is a subheading using smaller text; and
- Orange is a side text panel suitable for additional information.

Select a predefined layout and click **Save** to return to the previous window. Depending on the layout you select, various combinations of the image and text fields will be enabled.

Click **Select Image** to pick an image from the Club Web Graphics library. You can also upload a new image into the library from this window. Highlight an image from the list to preview it in the window, then click **Select** to make it the current image. You can also click **Remove Image** to remove an existing image.

The pre-defined page header also supports a background image. This image may be a small graphic pattern that is tiled across the background, or a larger image that fills the whole background. A good size for the latter option is the width of the current template (usually 750 pixels wide) by 125 pixels high.

Many clubs and associations find that they have more control switching to the Custom HTML option and loading a single image that takes over the whole header. As above, a good size for this image is the width of the current template (usually 750-900 pixels wide by 100-150 pixels high. Wider images will push the template wider than its default width.) This image should be created outside ClubExpress in an image design program such as PhotoShop, Corel Draw or Paint Shop Pro, and saved as a JPEG, then loaded into your header using the **Insert Image** icon.

When you make changes to the various options, click **Update Preview** to see what the new header looks like. Click **Save** to make this the final header and return to the menu, or **Cancel** to return without making a change.

Other Content Boxes

Templates may be defined with one or more additional content boxes. For example, most templates with a vertically oriented menu will have a content box for the area under the menu. Whatever is specified in these boxes appears on every page of your website.

Each content box has a description and a recommended width and height. This information is provided as a guideline to help you maintain a reasonable look and feel on the website.

Click **Create** to define content for a content box. The ClubExpress content editor will be displayed, allowing you to place any content in the content box. Be sure to define content that is the right “shape” for the box. For example, the area under the menu should have content that is narrow so that the menu is not pushed too wide on the page.

When content is first defined, it is de-activated. Click the **Activate** link to make the content visible on your template. Click the **De-activate** link to hide currently showing content. This feature is especially suitable for seasonal content.

Click **Edit** to edit the existing content in a content box, and **Delete** to remove the contents of the content box completely.

MENUS

Your ClubExpress website supports different menus for public users and for members who have logged into the system. The choices on each menu are often different; for example, the Benefits page and Member Signup modules are not typically shown on the member side of the website since there isn't any reason for members to see this information. On the other hand, most clubs and associations do not show the Member Directory module on the public side of the site, since this is information that should only be available to members.

You can also define different menus for different member types. Trial members may only have limited access to the website (for example, they cannot see discussion forums) while business members might see different choices than families. If you give admins their own member type, they could also have their own menu.

The system also supports submenus, separators on menus, and menu links to external websites.

Before starting to build your menus, take some time to lay them out on paper, deciding what should be on top-level menus and what should be on submenus. When you are ready, build the submenus first and then they will be ready to be placed on the top-level menus.

You should also be careful not to provide back-door access to features that are not on a specific menu. For example, if Trial members should not be able to see discussion forums, don't provide a link to the forums in the body of a page elsewhere on the website; trial members would be able to click that link and end up in the forums anyway. Just because a module or page is not on the menu for a member type doesn't mean that it's not accessible to members through some other channel.

Click **Menus** to display a screen similar to the following:

Home • Control Panel • **Menus**

Menus

ClubExpress supports different navigation menus for visitors to the site and for members. Select a category from the table below and click "Edit" to change the menu for that group of users.

Menus

[Add Menu](#)

Menu Name	Default		Maintain	
	Public	Member	Edit	Delete
auto pay menu			Edit	Delete
Member Menu		✓	Edit	Delete
Public Menu	✓		Edit	
Trial Member Menu			Edit	Delete

Sub-Menus

[Add Sub-Menu](#)

Menu Name	Maintain
Custom Dir. N-Z	Edit Delete
Custom Dir. A-M	Edit Delete
Custom Modules	Edit Delete
Member SubMenu	Edit Delete
Public SubMenu	Edit Delete

External Menu Links

Manage your links to external site here

[Add External Link](#)

Link Name	Menu Text	Maintain
People.com	People.com	Edit Delete
CNN	CNN	Edit Delete

[Return to Previous Page](#)

Figure 12.4 – Menu Configuration

The top section allows you to define top-level menus for the public, members and different member types. The middle section allows you to define submenus that can be shared across multiple main menus. The bottom section allows you to define menu choices that link to external web pages.

Click **Edit** for the Public or Member menu to display a popup window similar to the following:

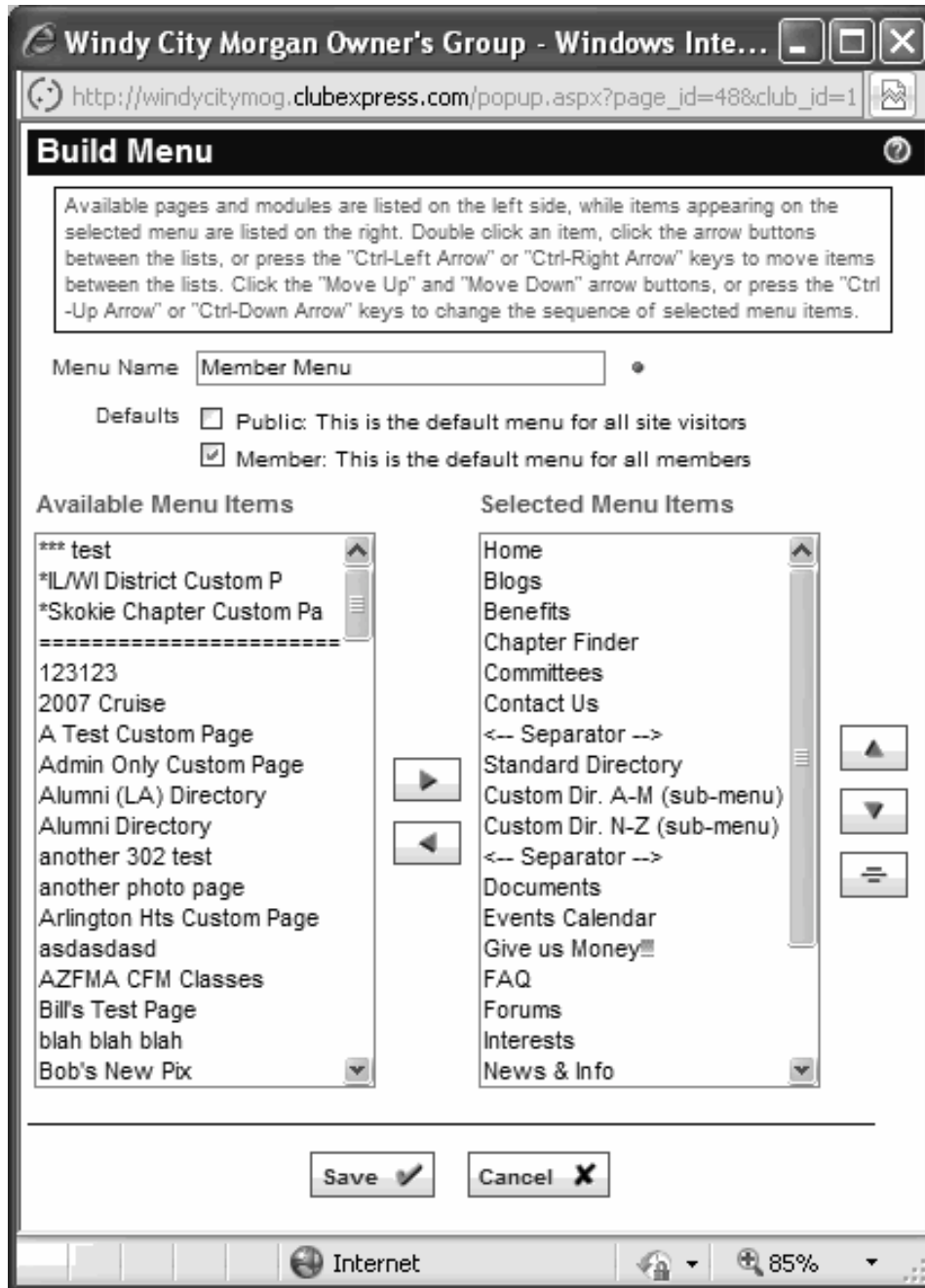


Figure 12.5 – Build Menu

Each menu has a unique name. You can also specify whether this should be the default public and/or member menu. Only one menu can be the default public or member menu at any time; checking either of these options will remove the default flag from another menu where it was set.

For the public or member menus, the list on the left side will include all of the following options:

- The Home page
- Built-in module main pages
- Custom web pages
- Photo pages
- Any submenus (see below)
- External menu links (see below)

Selected modules and pages are on the right side. Use the right and left arrow buttons to move modules between lists. You can also double-click the mouse or press *[Ctrl-LeftArrow]* and *[Ctrl-RightArrow]* to accomplish the same tasks.

To change the sequence of selected modules, click on a module name in the right side list then use the up and down arrows to change its position. You can also select a module name and use *[Ctrl-UpArrow]* and *[Ctrl-DownArrow]* to move choices using the keyboard.

To add a separator, click the Separator button. To remove a separator, highlight it and click the button again, or move it to the left (off the menu.)

Click **Save** or **Cancel** to close the window.

Submenus

To build a submenu, click the **Add Sub-Menu** button. You will see a similar dialog to the one shown above but without the “default” options. The list of available menu items includes all of the above except other submenus (At present, ClubExpress only supports one level of submenu.)

Then, when you are building a top-level menu, the available submenus will appear in the list of available menu items.

External Menu Links

ClubExpress includes the ability to add items to a menu which link to an external website. Click the **Add External Link** button. You will see the following dialog:

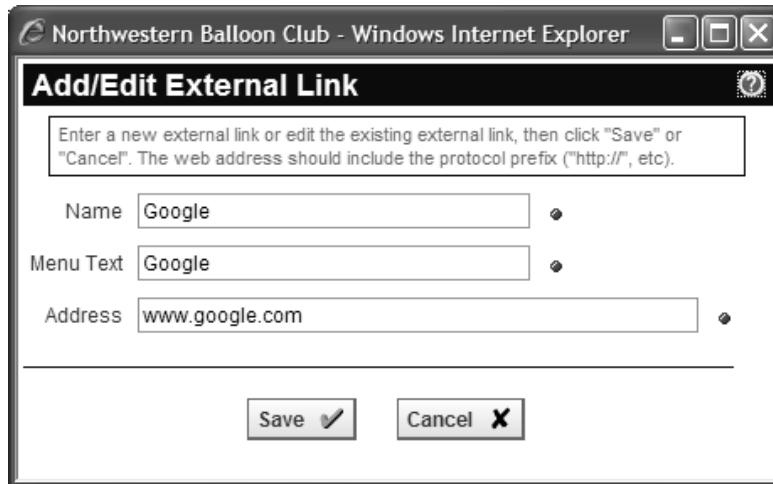


Figure 12.6 – Add/Edit External Menu Link

Enter a name for this link, the text to appear on the menu, and the URL, then click **Save** to save your external link.

Click the **Edit** link to edit an existing external menu link, or **Delete** to remove a link. It will be removed automatically from any menus on which it appears.

This feature can also be used to provide access to ClubExpress pages that do not normally appear. For example, if you build a special menu for administrators, you might want to give them one-click access to the Member Manager. But this page does not normally appear on the list of available pages. However, you could define a link to this page as an external menu choice, which then allows you to put it on the menu.

BUILT-IN MODULE INDEX

Selecting this option displays a screen similar to the following.

Home • [Control Panel](#) • Built-in Module Index

Built-in Module Index

From this screen you can manage the built-in modules within ClubExpress. These are pre-defined modules designed to perform common tasks within clubs and associations. In the table below, "Enabled" indicates whether the module is available to be configured and displayed, while "Live" indicates whether the module is visible to users. Enabling a module without making it live allows you to get the module ready before you show it to site visitors. Click "Enable" to enable a module; the configuration dialog will be displayed. Click "Configure" to display this dialog after the module has been enabled; one of the options on the dialog is to disable the module. Click "Coordinators" to define who can update this page, and "Admin" to update the page itself.

Module Name	Enabled	Active	Maintain
Home	✔	✔	Configure
Benefits	✔	✔	Configure Coordinators Admin
Chapter Finder	✔	✔	Configure Coordinators Admin
Committees	✔	✔	Configure Coordinators Admin
Contact	✔	✔	Configure Coordinators Admin
Documents	✔	✔	Configure Coordinators Admin
Donations	✔	✔	Configure Coordinators Admin
Events Calendar	✔	✔	Configure Coordinators Admin
FAQ	✔	✔	Configure Coordinators Admin
Forums	✔	✔	Configure Coordinators Admin
Interests	✔	✔	Configure Coordinators Admin
Member Signup / Information	✔	✔	Configure
Membership Directory	✔	✔	Configure
News	✔	✔	Configure Coordinators Admin
Photo Page Index	✔	✔	Configure Coordinators Admin
Storefront	✔	✔	Configure Coordinators Admin
Surveys	✔	✔	Configure Coordinators Admin

[Return to Previous Page](#)

Figure 12.7 – Built-in Module Index

This is a list of modules built into ClubExpress. We are continually adding new modules, so this list will be expanded over time.

These are pre-defined modules designed to perform common tasks within clubs and associations. In the table, the **Enabled** column indicates whether the module is available to be configured and displayed, while the **Active** column indicates whether the module is potentially visible to users. Enabling a module without

making it active allows you to get the module ready before showing it to site visitors and members.

Configure

Click **Configure** to configure the module. The following popup window is displayed:

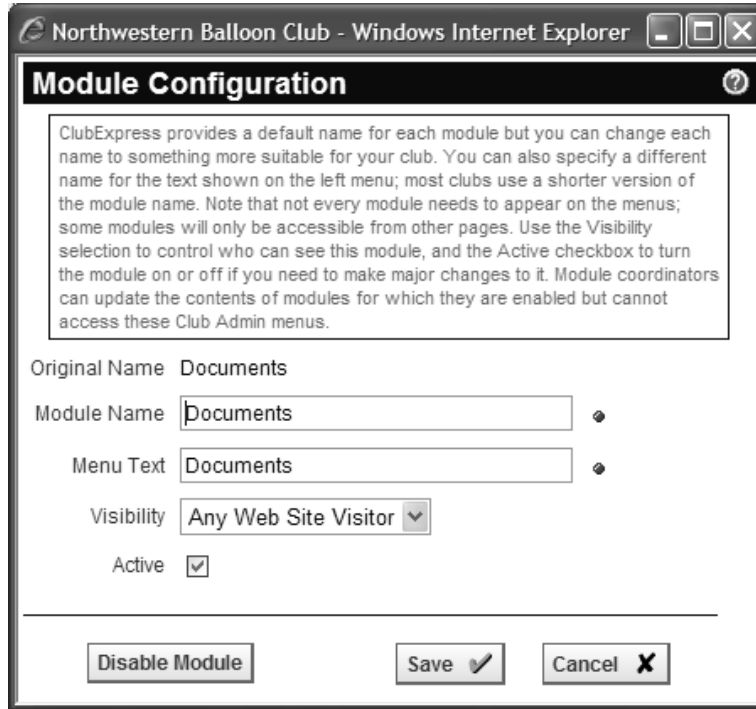


Figure 12.8 – Module Configuration

ClubExpress allows you to use a different name for each module within the system (for example, in popup selection lists) and for the module when it appears on a menu (the actual menu text, which is often shorter than the full module name.) You can also control who can see the module and whether it is active or disabled. When you first configure a module, the **Active** checkbox is enabled, but most modules must first be configured by clicking the **Admin** link to have them function as you would expect.

Coordinators

Click **Coordinators** to specify club or association members who can coordinate this module. Coordinators have administrative rights over this module only; use this option if selected members have specific responsibilities within the organization, such as events, news, document library, etc. The following popup window is displayed:

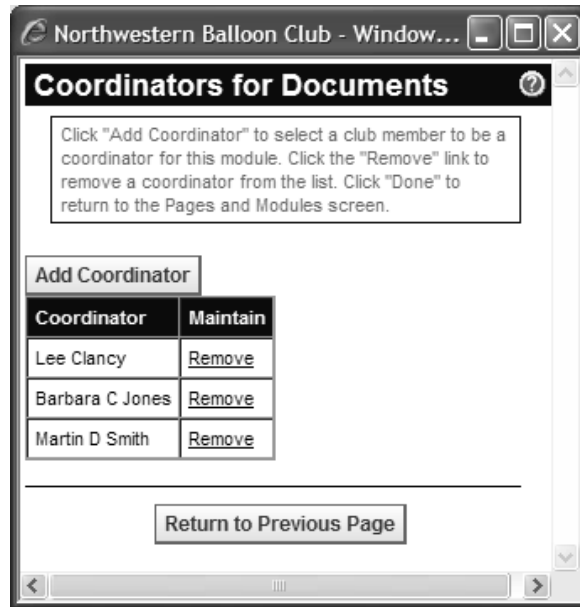


Figure 12.9 – Module Coordinators

Click the **Add Coordinator** button to display the standard **Select Member** window. Select a member and click **Save** to make this member into a module coordinator. Click **Remove** to remove a member from the list. Click **Done** to finish defining coordinators and return to the Built-In Module Index screen.



If your club or association has subgroups, you can define subgroup-specific coordinators for the Committees, Documents, Event Calendar and Discussion Forums module. The screen above will have an additional column showing the subgroup at which each coordinator is defined.

Admin

Click **Admin** to display the admin screen for the current module. Most modules have special administration screens that are described in the individual module chapters below. The Member Signup and Member Directory modules do not need a special screen, while the Home page is configured from the page itself when you are logged in as an administrator.

Individual modules are discussed beginning with Chapter 18.

CUSTOM PAGE INDEX

Your organization’s website can be expanded with any number of custom web pages. Custom pages are used to build out the unique content of your website, including information which is not represented in the built-in modules. Each page can contain text, images, videos and links to other pages and external sites, and the formatting can be as simple or as elaborate as you need.

When you select this option, you will see a screen similar to the following:

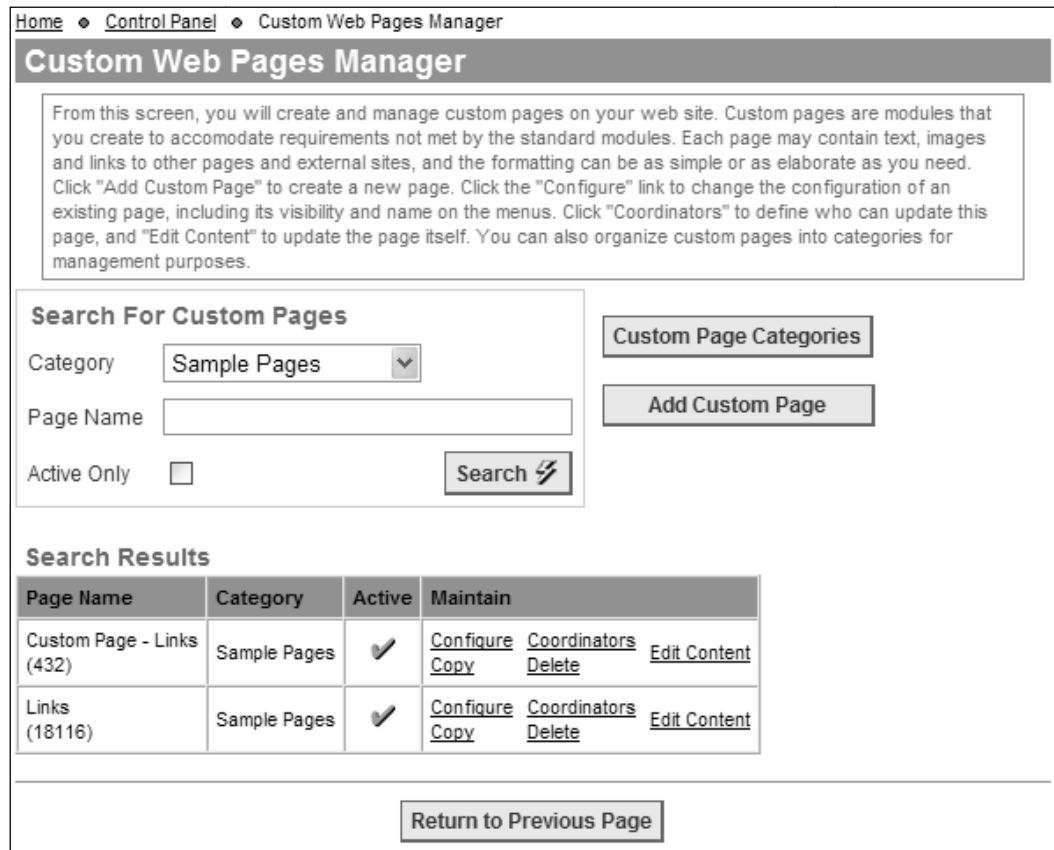


Figure 12.10 – Custom Web Pages Manager

Select a category or type in all or part of the page name. You can also limit the list to only Active pages. Click **Search** to find all matching pages.



If your club or association has subgroups defined, an additional filter option allows you to filter custom pages based on the subgroup level to which they are attached.

Custom Page Categories

Click this button to manage the categories into which custom pages are organized. You will see a screen similar to the following:

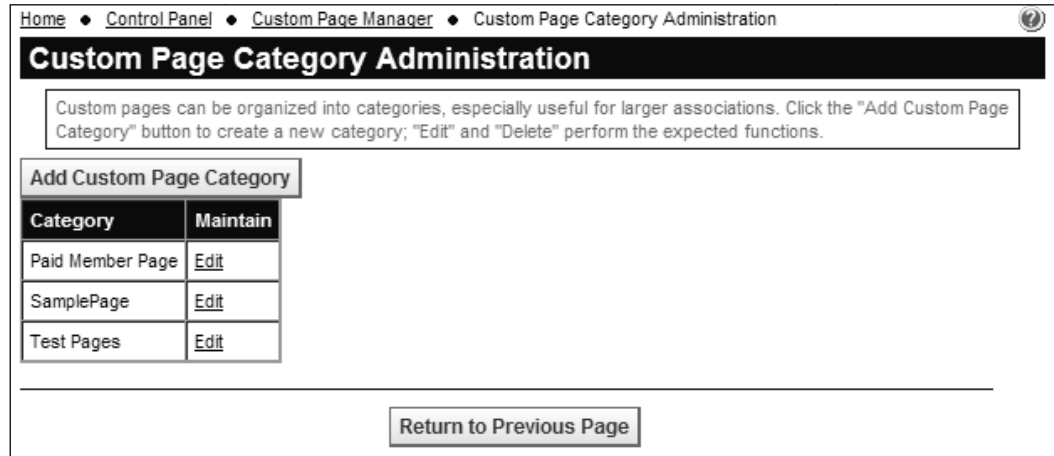


Figure 12.11 – Custom Page Category Administration

Click **Add Custom Page Category** to add a new category. Click the [Edit](#) link to modify an existing category or the **Delete** link to delete a category. (If a category is being used, the Delete link will not be displayed.)

Click **Return to Previous Page** to go back to the main list of pages.

Adding Custom Pages

Click **Add Custom Page** and you will see a screen similar to the following:



Figure 12.12 – Add Custom Page

Enter the name to use for this page and the text if it's placed on a menu. Select a category and visibility from the drop-down lists. Visibility has the following options:

- Any website visitor
- Members only
- Admins only – use this option to add pages which are only available to club administrators.

Click **Save** to create an empty page with these properties.

You can configure custom pages to be visible to administrators only, and even put these pages on the menu. You might use this option to allow other admins to review and approve the page before it's made visible to members or the public.



If your club or association has subgroups, you can assign a custom page to a specific subgroup. This automatically allows the subgroup administrator to maintain this page. Subgroup administrators can also create their own custom pages, and the subgroup selector is automatically modified to show just the subgroup(s) managed by that administrator.

Maintaining Custom Pages

Click **Configure** to display this same dialog, allowing you to change name, menu text, category and visibility.

Click **Coordinators** to add one or more coordinators who have administrative rights over this page. You will see the same screen described above for built-in modules.

Click **Copy** to make a copy of the page, perhaps to update it without losing the original. You will see a version of the Custom Page Configuration screen, allowing you to specify a new name and other properties for the page.

Click **Delete** to drop the page. You will be asked to confirm this action.

When you click **Edit Content**, the Advanced Content Editor described in Chapter 16 is displayed. This is a simplified web page editor that provides a word-processing-like interface to create web pages.

PHOTO MANAGER

Select this option to manage photos used on your website. This option allows you to upload an unlimited number of hi-res digital photos and organize these photos using tags. When you select this option, you will see a screen similar to the following:

Home • Control Panel • Photo Manager

Photo Manager

This screen allows you to manage photos uploaded by members and admins. Search for photos already uploaded, then preview or edit them. Click "Add Multiple Photos" or "Add 1 Photo" to upload photos to the website. Click "Tag Master List" to manage a master list of photo tags which can then be applied to different photos. Click "Tag Analyzer" to clean up photo tags.

Search

Tag And

Date Taken To

Photographer

Title

Search Results (3 photo(s) found) Page 1 of 1

Title	Date Taken	Photographer	Maintain
Traffic Jam	7/15/2006	Greg Anderson	Preview Edit Delete
Traffic Jam 2	8/12/2005	Fergus Macintosh	Preview Edit Delete
Traffic Jam 3	4/10/2008	Kevin Lanzer, Jr.	Preview Edit Delete

Figure 12.13 – Photo Manager

The initial display does not show the grid of photos. You can enter filter criteria for one or two tags, date taken, photographer, title, and whether photos uploaded by members should be included, then click **Search**. Photos are listed 30 per page, with the standard navigation controls to move between pages. The grid shows the title, date taken, and photographer for each photo.

For each photo, the following options are available:

Preview

Click **Preview** to view the photo in a simple popup window.

Edit

Click **Edit** to modify the basic properties of the photo. You will see a dialog similar to the following:

Northwestern Balloon Club - Windows Internet Explorer

Add/Edit Photo

This screen allows you to upload a single photo to the website. Select the file from your local hard disk or network, then complete the fields below. Tags allow admins and other users to find this photo. *Fields marked * require an entry.*

File Name bigstockphoto_Balloons_Rising_

Title *

Caption


Photographer

Date Taken

Allow Download of Hi-Res Version

Select Master Tag(s)

Tags

Preview 

Enter one or more tags that will be used to categorize this photo, one per line. Click the "Select Master Tag(s)" link to select tags from the master list.

Figure 12.14 – Edit Photo Configuration

Use this dialog to modify the title, caption, photographer, date taken and tags. Click **Save** to save your changes and return to the Photo Manager, or **Cancel** to return without saving.

Delete

Select **Delete** to remove the photo. After confirming this action, the photo will be deleted from the website and any pages where it has been placed. On photo pages it will simply not be there, but on custom web pages, the home page, etc., users will see your browser's symbol for a missing image file (often a red "x"). Just edit the page to remove the reference to this image.

The following options are available as buttons on the right side:

Tag Master List

Select this option to maintain a list of master tags. Each uploaded photo can be tagged with one or more keywords that describe the photo. Some clubs and associations may choose to maintain a master list of tags that can help ensure consistency. For example, you might want every photo from the 2009 Summer Picnic to be tagged with “2009 Picnic” instead of the dozens of variations that different photographers might apply.

When you select this option, you will see a screen similar to the following:

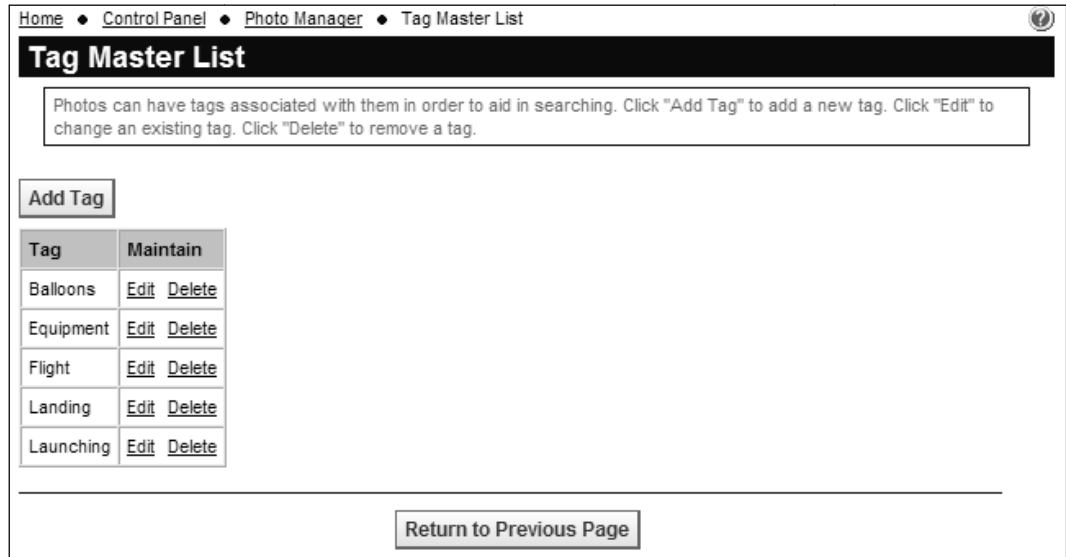


Figure 12.15 – Tag Master List

Click the **Add Tag** button to create a new master tag; you will see a simple dialog to enter the new tag. Click the **Edit** link to modify an existing tag or the **Delete** link to remove a tag. After confirmation, it will also be removed from all photos that reference that tag.

Tag Analyzer

When users enter their own tags, you will soon find inconsistencies and minor misspellings. The Tag Analyzer can help you clean up this list. When you select this option, you will see a screen similar to the following:

Home • Control Panel • Photo Manager • Tag Analyzer

Tag Analyzer

This page shows tags that are associated with photos, sorted alphabetically. Click 'Merge' to combine the specified tag with another one of your choosing. Click 'Delete' to remove the tag's association with all photos.

Tag	Count	Maintain
2009	2	Merge Delete
Candy Striper	1	Merge Delete
Fly-In	2	Merge Delete
In the Air	13	Merge Delete
Kids Day	4	Merge Delete
Launching	9	Merge Delete
Morning	1	Merge Delete
Rising	1	Merge Delete
Summer	2	Merge Delete
Test Photo Library	2	Merge Delete

[Return to Previous Page](#)

Figure 12.16 – Tag Analyzer

This screen lists every tag in use, together with the frequency of use. Click the Merge link beside the tag you want to replace to merge similar tags. Select its replacement from the popup dialog and click **Save**. You can also click **Delete** to remove a tag completely.

Add Multiple Photos

Select this option to upload multiple photos and place them all on your page. You will see the following dialog:

Northwestern Balloon Club - Windows Internet Explorer

Add Multiple Photos

Use this screen to upload multiple photos. Click the "Select Files" button to select one or more files from a local hard disk directory or network. Use [Shift-Click] to select a contiguous group of files or [Ctrl-Click] to select multiple individual files. Then fill out the other information below and click Save to begin the upload process.

	FileName	Title	Status
Select Files	bigstockphoto_American_Balloon_1691833.jpg	American Balloon	Remove
	bigstockphoto_Air_Balloon_165031.jpg		Remove

Photographer

Date Taken

Allow Download of Hi-Res Versions

Select Master Tag(s)

Tags

- Balloon
- Hot Air
- Albuquerque
- 2008

Enter one or more tags that will be used to categorize this photo, one per line. Click the "Select Master Tag (s)" link to select tags from the master list.

Figure 12.17 – Add Multiple Photos

Click the **Select Files** button to display a standard File Open dialog. Navigate to the folder containing the photos you want to upload. Click the first photo, then use *[Shift-Click]* to select a contiguous set of photos or *[Ctrl-Click]* to select discontinuous photos. You can only upload photos from one folder at a time.

When you click the **Open** button you will see a list of selected photos. Each photo will be shown with its filename in its Title box; you can modify the title of each photo directly from the dialog. If you see photos in the list that you don't want to upload, click the red x icon to remove them from the list.

You can also specify the photographer and date taken, as well as tags that will be applied to all photos. Click the **Select Master Tags** link to pick one or more

tags from the club’s master list. Once photos have been uploaded, you might want to edit each photo to further customize titles and captions.

When you click **Save**, all of the photos will be uploaded to the website. Click **Cancel** to close the dialog without uploading.

Important Note: Only upload photos that you have the right to upload (i.e. you hold the copyright or the copyright holder has granted permission for the photo to be uploaded.) If you upload photos without permission of the copyright holder, you run the risk of being sued for unauthorized use of copyrighted material.

Add One Photo

Select this option to upload a single photo. You will see the following dialog:

Northwestern Balloon Club - Windows Internet Explorer

Add/Edit Photo

This screen allows you to upload a single photo to the website. Select the file from your local hard disk or network, then complete the fields below. Tags allow admins and other users to find this photo. Fields marked * require an entry.

Select File: C:\Documents and Settings\Registered User\My Dc [Browse...]

Title: Crowd Control

Caption: Things got busy when more than a dozen balloons launched at the same time.

Photographer: Barry McMaster

Date Taken: 6/7/2009

Allow Download of Hi-Res Version

Select Master Tag(s)

Tags: Launching, Crowded Skies, Traffic Jam

Preview: [Image of hot air balloons]

Enter one or more tags that will be used to categorize this photo, one per line. Click the "Select Master Tag(s)" link to select tags from the master list.

[Save] [Cancel]

Figure 12.18 – Add One Photo

Click the **Browse** button to browse to a photo on your local hard disk. You can also specify a title, caption, photographer, date taken, and one or more descriptive tags.

Tags are used to index and reference photos. Enter tags into the text box, one per line. Click **Select Master Tags** to add one or more master tags to your photo.

Click **Save** to upload your photo or **Cancel** to close the dialog without saving.

When a photo is uploaded, the system checks its size. Large photos are saved automatically in three resolutions:

- Original resolution, uncompressed
- Screen size (longest dimension is configurable (450 pixels by default))
- Thumbnail size (longest dimension is 120 pixels)

Photos that are smaller than the screen size are only saved in two resolutions.

If you don't want visitors to be able to download an original high-resolution copy of the image, uncheck the **Allow Hi-Res Download** box. A "Download Original" link will not be displayed. (Note that users can still right click the lo-res screen size version and save it. There's no way to stop this.)

PHOTO PAGES

Photos are uploaded and organized using their tags. When you want to display these photos, use Photo Pages.

These pages can be created at both the club and member levels (though the latter can be disabled as a system function.) Each page can use one of nine pre-defined layouts for the photos and can feature special header text describing the contents of the page.

When you select **Control Panel – Photo Pages**, you will see a screen similar to the following:

Home • Control Panel • Photo Page Manager

Photo Page Manager

This screen allows you to manage photo pages. Use the 'Search' panel to find a photo page based on its name, category and/or whether it's a member photo page or a club-level page. Select 'Photo Page Options' to update options applying to all photo pages. Select 'Photo Page Categories' to manage the categories into which photo pages are organized. Click 'Add Photo Page' to create a new page.

Search

Page Name

Category All Categories ▼

Include Member Photo Pages

🔍

Search Results (6 photo page(s) found) ◀ Prev Page 1 of 1 Next ▶

Title	Type	Category	Status	Maintain
2009 Summer Picnic	Club	Social Events	Visible	Configure Coordinators Edit Content Description Delete
Balloons in Flight	Club	Member Photo Pages	Visible	Configure Coordinators Edit Content Description Delete
Launching	Club	Ballooning	Visible	Configure Coordinators Edit Content Description Delete
Sunday Fun at the club	Club	Social Events	Visible	Configure Coordinators Edit Content Description Delete
Test Photo Page	Club	Social Events	Visible	Configure Coordinators Edit Content Description Delete
Training	Club	Ballooning	Visible	Configure Coordinators Edit Content Description Delete

Figure 12.19 – Photo Page Manager

The search panel allows you to limit the list of photo pages by page name (title) and/or category. You can also optionally include member photo pages. Click the **Search** button to display a list of matching pages.

The following options are available in the right-side buttons:

Photo Page Options

Click this button to display the following dialog:

Home ♦ Photo Page Manager ♦ Photo Page Options

Photo Page Options

This screen allows you to configure default options which apply to all photo pages. Click Save to save your changes and return to the Photo Page manager, or Cancel to return without saving.

Member Photo Pages

Allow member photo pages Yes No

Display member photo pages on the photo page list

Photo Page Layout

Show Preview on Photo Page List Yes No

Sort Order within Categories Alpha - ascending order
 Alpha - descending order
 Most recently updated at top

Photo Size

By default, the "screen size" version of your uploaded photos have a max size of 450 pixels. This is a good size for most on-screen viewing. For larger screen images, increase the value below. Note that the larger images may be inconvenient for users with smaller monitors or limited internet bandwidth.

Max "Screen" Photo Size pixels

Figure 12.20 – Photo Page Options

The following options can be set:

- **Allow member photo pages** controls whether members can create their own photo pages and upload photos into them. If this option is set to Yes, members will see a **Photo Pages** option in their Profile screen.
- **Display member photo pages on the photo page list** controls whether member photo pages are included in the Photo Page List module and, if so, whether they are placed at the top or the bottom.

- **Show Preview on Photo Page List** – set this option to display the first photo from the photo page in the Photo Page List module.
- **Sort Order within Categories** can be set to alphabetical (ascending or descending) or by date of most recent update.
- **Max “Screen” Photo Size** allows you to control the maximum dimension (height or width) for the screen size resolution that the system generates when you upload a high-resolution photo. The default value is 450px but you can modify this to be any size. Note that the popup photo viewer will dynamically shrink photos to fit if the specified resolution is larger than the user’s current screen size.

Click **Save** to save your changes and return to the Photo Page Manager, or **Cancel** to return without saving.

Photo Page Categories

Click this button to maintain the list of photo page categories. You will see a screen similar to the following:

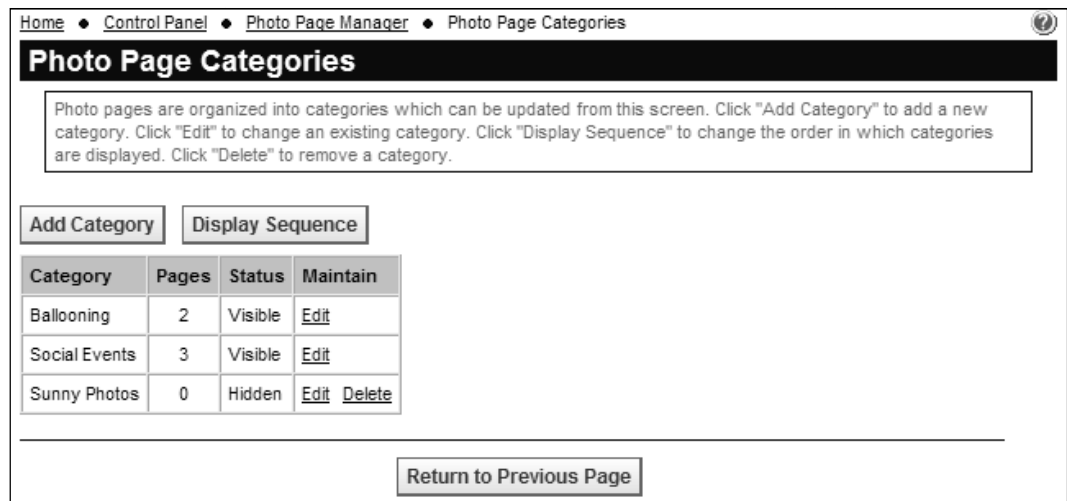


Figure 12.21 – Photo Page Categories

Click the **Add Category** button to create a new category. You will see a standard dialog allowing you to enter the new category.

Click the **Display Sequence** button to modify the order in which categories are displayed. You will see the standard ClubExpress display sequencer, where you can select one or more categories and move them up or down.

Click the **Edit** link to edit an existing category or the **Delete** link to remove a category. You can only delete a category if it’s not assigned to any photo pages.

Click **Return to Previous Page** to go back to the Photo Page Manager.

Add Photo Page

Click this button to create a new photo page. You will see the following dialog:



Figure 12.22 – Add/Edit Photo Page

Specify the page name and text to use if the page is placed on the menu (which is often shorter.) You can also choose from among nine layouts:

- 1, 2 or 3 photos across;
- Each photo shown with both title and caption, title only, or neither.

You can also specify whether the page can be made available to all website visitors or whether it should only be visible to members. The page is initially hidden, to allow you to add photos and introductory text to it; when you are ready, click back to this screen using the **Configure** link to make the page visible.

Click **Save** or **Cancel** to return to the Photo Page Manager.

The following options are available in the grid for each photo page.

Configure

Once a photo page is defined, click this link to modify the page's properties. The same form described above will be displayed.

Edit Content

Click this link to manage the introductory text and photos on the page. This screen is discussed in detail below.

Coordinators

Click this link to display the standard Coordinators screen. This screen allows you to assign other club members to be coordinators for this page, allowing them to edit the introductory text and photos.

Description

Clicking this button displays the advanced content editor, allowing you to create preamble text that is displayed at the top of the photo page. With this editor, you have full control over fonts, alignment, styles and other powerful HTML options; you can even add photos and other graphics.

See Chapter 16 on the content editor for more information.

Delete

Click this link to delete this page. The photos on the page are not deleted; they remain in your library to be placed on other pages. You will be prompted to confirm this action.

EDITING A PHOTO PAGE

There are two ways to edit an individual photo page:

1. From the Photo Page Manager screen, click the **Edit Content** link beside the photo page you wish to modify.
2. When the photo page itself is displayed, administrators and coordinators can click the red **Admin** link in the upper right corner of the page.

You will see a screen similar to the following:




Photo	Title	Maintain
	It's Alive!	Edit Remove
	Sunset Ride	Edit Remove
	Kissing Cousins	Edit Remove

Figure 12.23 – Edit Photo Page Content

This page lists the photos you have added to the page. The following functions are available:

Select Photo(s)

Click this button to add a photo to the page. The following screen will be displayed.



Figure 12.24 – Select Photo(s)

Enter one or two tags and click the **Show Photos** button to display a list of matching photos. As you select each photo, a preview will be shown in the right panel. Click the **Select** button to select the current photo and add it to the page, or **Cancel** to close the dialog without selecting.

[Shift-Click] and *[Ctrl-Click]* can be used to select multiple photos at a time. However, in multi-select mode, the Preview panel will only show the top photo selected in the list.

Add Multiple Photos

Click this button to add multiple photos to the website and this page in one simple step. You will see the dialog described above which allows you to select multiple photos from your local hard disk or network.

Important Note: Only upload photos that you have the right to upload (i.e. you hold the copyright or the copyright holder has granted permission for the photo to be uploaded.) If you upload photos without permission of the copyright holder, you run the risk of being sued for unauthorized use of copyrighted material.

Add One Photo

Click this button to add one photo to the website and this page in one simple step. You will see the dialog described above which allows you to select a single photo from your local hard disk or network.

Display Sequence

This button shows the standard ClubExpress sequence dialog, allowing you to reorder the photos on the page.

Configure Page

Once a photo page is defined, click this button to modify the page's properties. The same form described above will be displayed.

Page Description

Clicking this button displays the advanced content editor, allowing you to create preamble text that is displayed at the top of the photo page. With this editor, you have full control over fonts, alignment, styles and other powerful HTML options; you can even add photos and other graphics.

For each photo in the list of photos, the following options are available:

Edit

Click this link to display a popup dialog showing the information saved with the photo. You can modify all of the information saved with the photo. Click **Save** or **Cancel** to return to the Photo Page list.

Remove

Click this link to remove the photo from this page. It remains in the photo manager to be used on other photo pages. You will be prompted to confirm this action.

DOMAIN NAMES / QUICK LINKS

Many clubs own at least one Internet domain name which is used as the website address. Some clubs own more than one domain while others own none.

An Internet domain name takes the following form: *Name.Extension*

Name can be any string of letters and numbers, up to 63 characters long (though they are usually much shorter.) Extension is usually one of the following:

- org
- com
- net
- info

although other extensions are also available. Names and extensions are not case-sensitive. Here is an example of a complete domain name:

ChicagoCorvettes.org

The combination of a name and extension must be unique in the world-wide domain naming system; this is why shorter, well-known names were taken long ago and why special names (for example, “business.com”) command high prices whenever they become available.

ClubExpress supports multiple domain names for a club. For example, if the Chicago Corvette club also owns

WindyCityVettes.org

both names can be tracked by the system and both will point to the same ClubExpress-hosted website. You can even have domain names which point to an interior page within the main website instead of the home page.

Configuring Domain Names

To configure the system to recognize a domain name, send an email to support@clubexpress.com with the domain name. We also need to know whether we are handling email for this domain name or whether you will keep email with your current provider. If the latter, you will also need to send us additional information from your provider so that we can configure email properly. (Generally, this information comprises one or more MX and CNAME records, which information you will get from your provider. Don't worry if these data don't make sense; just forward it as provided to you and we'll know what to do with it.)

Once a domain has been configured by us, you can configure which page on the website it points to. Clicking **Domain Names / Quick Links** displays the following screen:

Home • Control Panel • Domain Names/Quick Links

Domain Names/Quick Links

Domain Names

If your PTA owns one or more domain names, you can use them to access your ClubExpress web site. Be sure to read the "Internet Domain Names" section in chapter 5 of your administrators manual and follow the instructions there. Then contact ClubExpress via email at support@clubexpress.com and we will add your domain name(s) to your site. If you have any questions, or would like help in obtaining a domain name, please call us toll-free at 1-866-HLP-CLUB (457-2582).

Note that you do not need a domain name to access your web site; visitors and members can also use <http://BigBendPTA.clubexpress.com>.

Domain Name	Links To	Primary	Maintain
bigbendmspta.org <small>Email for this domain is handled by ClubExpress</small>	Home Page	No	Edit
www.bigbendmspta.org	Home Page	Yes	Edit

Quick Links

Quick links are used to provide plain-text links in emails and other documents. Frequently, long links get word-wrapped in an email and do not work properly. Quick links allow you to keep links to your site shorter and less susceptible to formatting problems. Several "System" quick links to common pages are provided already. You may add additional quick links as needed.

[Add Quick Link](#)

Quick Link	Links To	Maintain
calendar	Event Calendar (System)	
forum	Discussion Forums (System)	
login	Login (System)	
profile	Member Profile (System)	
renew	Member Renewal (System)	
NewMemberSurvey	Survey - New Member Survey	Edit Delete
sleepover	Photo Page - March Sleepover	Edit Delete

[Return to Previous Page](#)

Figure 12.25 – Domain Names

The top grid shows one or more domains configured to point to your website. Domains will be shown both with and without the "www." prefix to ensure proper operation of your site. For example:

ChicagoCorvettes.org
www.ChicagoCorvettes.org

The grid will show if ClubExpress is handling email for this domain. It will also show which page the domain points to and, if multiple domains are listed, which is flagged as the primary. This one will appear in emails and in the address bar after members log out.

Click the Edit link to modify the properties of a domain. The following popup window is displayed:

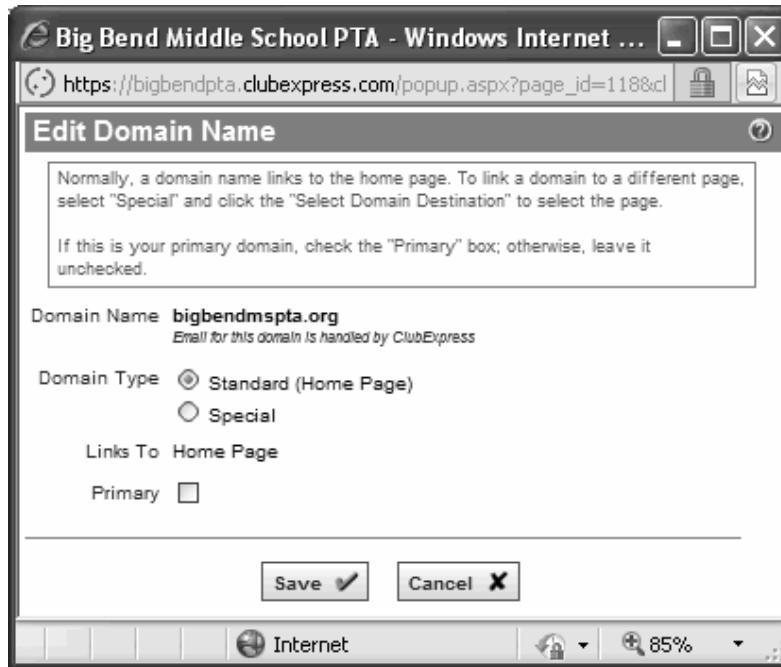


Figure 12.26 – Edit Domain Name

The standard option points the domain to the home page. Select the **Special** radio button to define a different page within the website to which this domain should point. Click **Select Domain Destination** and you will see a dialog similar to the following:

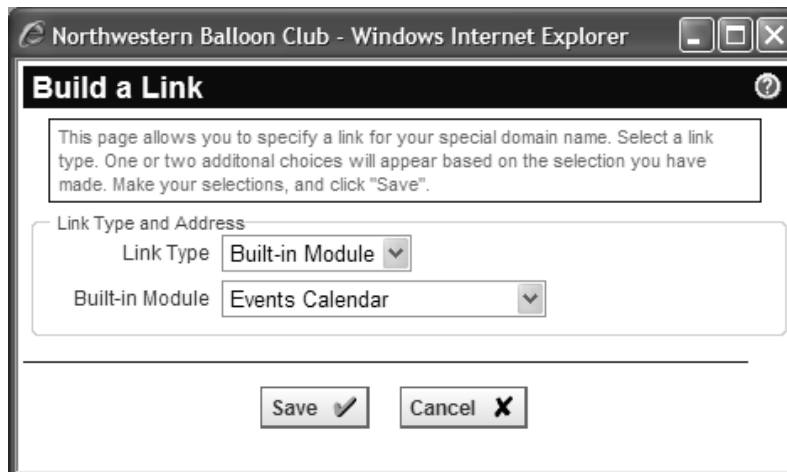


Figure 12.27 – Build a Link

Specify the link type and select the specific link from among available options. Click **Save** to save your selection, or **Cancel** to return without saving.

Check the box for the primary domain and click **Save** to save your changes and return to the main domain names screen, or **Cancel** to return without saving.

For clubs without their own domain name, the following naming convention (known as a “Sub-domain”) is always supported:

ChicagoCorvettes.clubexpress.com

(Note that you should never specify “www.” with the above sub-domain.)

ClubExpress uses the club’s “Short Name” on the Club Information – Name and Description screen to determine which sub-domain will be recognized.

Quick Links

Quick Links allow you to define a simplified URL which points directly to an event or a special page on the website. For example, you can define a link such as:

www.ChicagoCorvettes.org/Auction

and have the system jump directly to the Auction page in the event calendar. Quick Links are intended to be used in emails and printed documents where the actual long and ugly link to a specific page, event or document cannot be hidden by “nice” HTML or an image.

The system includes a number of built-in Quick Links that cannot be modified. To create a new Quick Link, click **Add Quick Link**. You will see a dialog similar to the following:

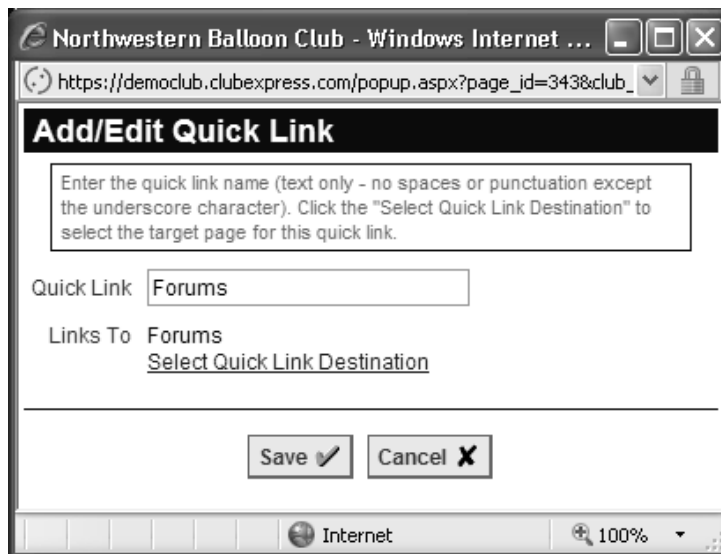


Figure 12.28 – Add/Edit Quick Link

Specify the name of the Quick Link. Click the Select Quick Link Destination option to display the Build a Link dialog described above.

Click **Edit** to edit an existing link or **Delete** to delete a link. Once it's deleted, it can no longer be used.

EMAIL ACCOUNTS

ClubExpress supports club-level email accounts such as:

- president@myclub.org
- info@myclub.org

If we are handling email for you, when you select **Email Accounts** from the Control Panel, you will see a screen similar to the following:



Figure 12.29 – Email Account Administration

You will see a grid with the number of rows equal to the number of available email accounts. Click the **Assign** link to assign an account; you will see the following screen:

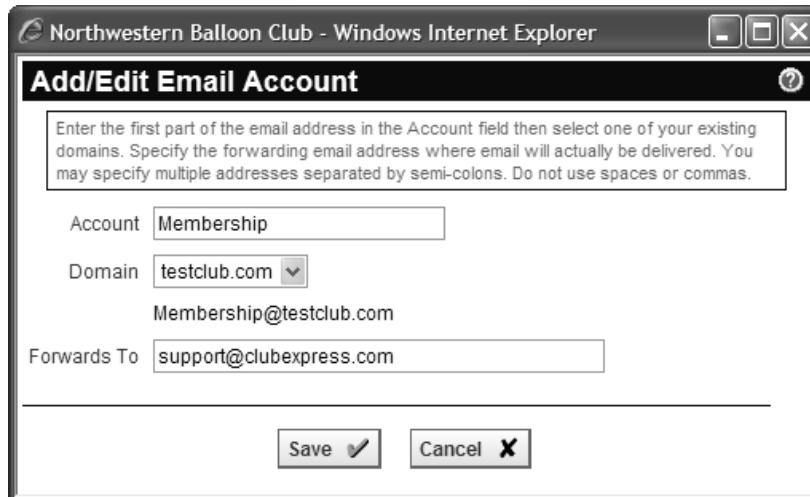


Figure 12.30 – Add/Edit Email Account

Enter the email account name (for example: president). Select which of your domains this email account belongs to; of the domains defined on the Domain Names/Quick Links screen you will only see those for which ClubExpress is handling email. Then specify the actual email address to which emails should be forwarded.

You can specify multiple email addresses in the Forwards To field by separating them with semi-colons (but no spaces), up to a maximum of 255 characters. For example:

john@gmail.com;mary@yahoo.com;bill@comcast.net

Click **Save** to save your changes and return to the Email Account Administration screen, or **Cancel** to return without saving.

If we are not handling email for you, you will see a message on this page indicating that forwarding email accounts cannot be created.

Notes about Email Accounts

By default, each club has five accounts but additional ones can easily be added for larger clubs. There is no charge for these accounts unless the number added is out of proportion to the size of your club.

These are “forwarding” accounts only, not POP3 accounts; there is no local storage and no web interface to view emails online. All emails sent to the account will be forwarded to a different email account. This feature allows you to have a generic account such as president@myclub.org and have it forwarded to a different email account each year as the club’s president changes.

This feature requires that you have an Internet domain which is used to access your club’s website. Email accounts do not work if you are just using your Short Name to access your website. You must also use this feature for all email accounts attached to this Internet domain.

These accounts have been configured with anti-virus and anti-spam protection, which should block most virus and spam emails at the server.

If you would prefer to run your own email accounts on another server, you can certainly continue to do so. However, be aware that if you host email accounts on another server, you cannot use the email listserve features in the Discussion Forums module using that domain (but you can do so with another domain obtained for this purpose.) See chapter 28 for more information.

WEB GRAPHICS ADMIN

Select this option to manage images uploaded to the website, including logos and graphics used on the home page, on custom pages, and in the page header and content box under the menu (if defined.) Note that photos are managed separately, in the Photo Manager. Photos are stored in multiple resolutions whereas web graphics are stored as uploaded.

When you select this option, you will see a screen similar to the following:

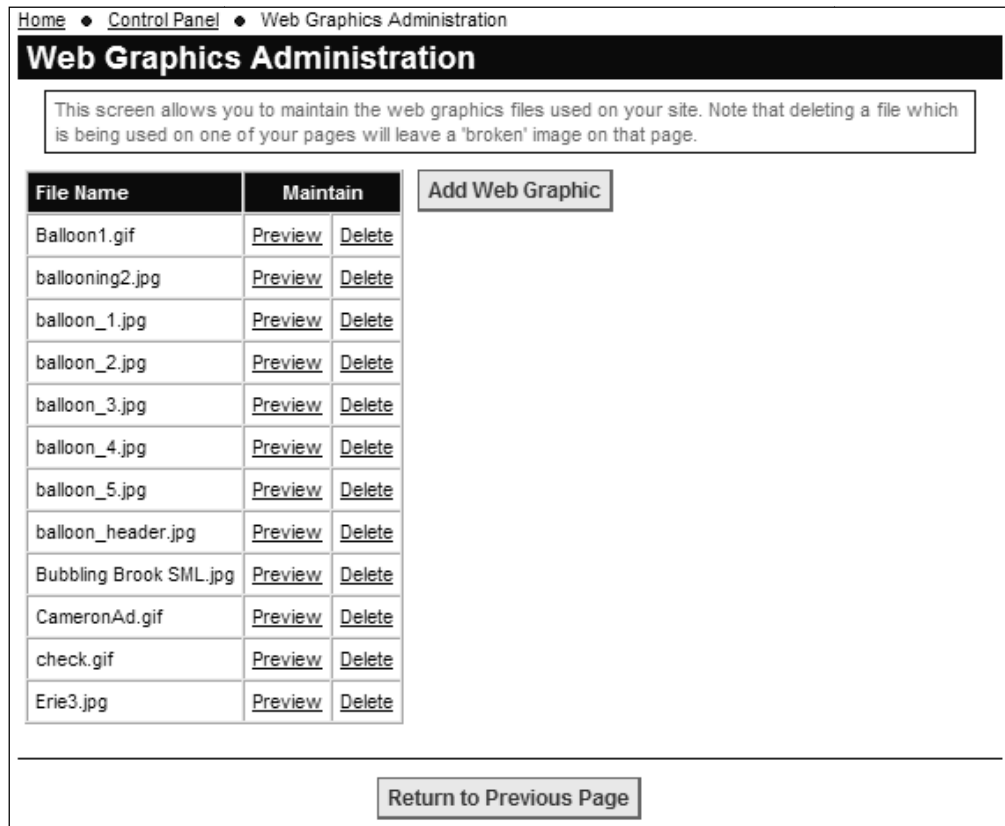


Figure 12.31 – Web Graphics Administration

Web graphics are stored by their filenames. Click **Add Web Graphic** to upload a new graphic. You will see a screen similar to the following:

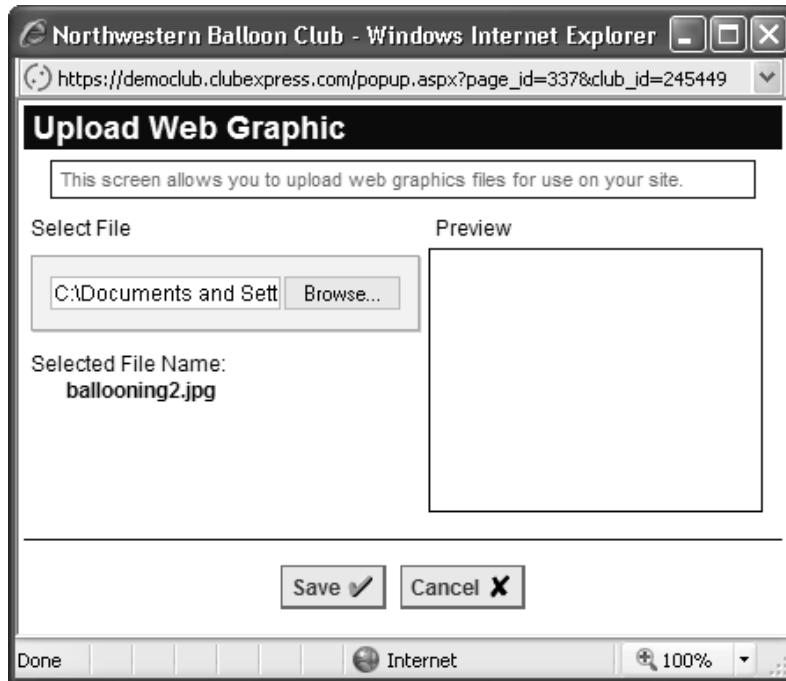


Figure 12.32 – Add Web Graphic

Browse to the file on your local hard disk or network. If your browser supports it, a preview is shown in the panel on the right side. Click **Save** to upload the image or **Cancel** to return without uploading.

On the main page, click **Preview** to see a preview of an image or **Delete** to remove that image from your website.

WEBSITE OPTIONS

Select this choice to modify options related to the website. You will see the following screen:

Home • Control Panel • Web Site Options

Web Site Options

This screen lists other configuration options for your web site.

Show "Add Me To Your Mailing List" link Yes No

Show "My Directory Listing" link Yes No
 Directory Link Text:

Trial Members can access web site Yes No

Show member sign-up link in Benefits Yes No
 Sign-up link text:

vCard Visibility Everyone Admins Only Off

vCalendar Visibility Everyone Admins Only Off

Website Keywords

Google Site Verification ID
Note: Enter only the Google ID, not the entire <meta> tag that Google specifies.

Google Analytics Account ID
Note: If you have a Google Analytics account ID, enter it here to track and measure traffic on your web site.

Figure 12.33 – Website Options

Show "Add Me..." link

By default, ClubExpress places a link on the public side of the website which allows visitors to be added to your mailing list (the non-member database.) If you prefer, this link can be hidden.

Show "My Directory Listing" link

Select "Yes" to display a special link in the login panel once members have logged in. This link jumps to the member's Bio page so that they can review and edit it. You can also specify the text to be used for this link.

Trial Members Accessing the Website

By default, trial members (see page 115) can log into the website and are treated as regular members. This option allows you to block trial members from logging into the website.

Show member sign-up link in Benefits

ClubExpress includes a Benefits module, typically placed on the public side of your website to extol the benefits of joining the organization. When this option is set to Yes, a button appears in this module allowing non-members to jump straight into the Member Signup Wizard.

You can also control the text to use for this link. The default is “Sign Me Up”.

vCard and vCalendar Visibility

When the Membership Directory module is enabled, the system usually places a vCard icon on the member’s bio page allowing other members to download contact information to their local PIM (for example, Outlook.)

When the Events Calendar module is enabled, the system usually places a vCalendar icon on the event details page allowing members and non-members alike to download the event to their local PIM.

With these options, you can control visibility for the vCard and vCalendar icons, showing them to everyone, or just members-only, or turning them off completely.

Website Keywords

Any keywords that you specify in this field will be placed in the “keywords” meta tag, in the head tag of all public web pages. Some search engines use this meta tag to help them index your pages. Specifying the right keywords can improve your relative position in organic search results generated by these engines. Click **Save** to save your changes and return to the Control Panel, or **Cancel** to return without saving.

Google Site Verification ID

If you have signed up with Google Site Verification, enter the unique ID for your website, provided by Google, into this box. Do not copy and paste the entire <meta> tag that Google specifies; we will add that for you.

Google Analytics

If you have signed up for a Google Analytics account, enter your account number into the field provided. Do not enter the complete string provided by Google, just the unique number shown within double quotes near the end of this string. We will handle the rest.

Chapter 13 – Control Panel – Finances

This section of the Control Panel provides options to manage club finances, including payments, credits, bank accounts and bank account activity, and QuickBooks®² integration.

PENDING PAYMENTS

Clicking this choice displays a screen similar to the following:

Home • Control Panel • Pending Payments

Pending Payments

This page shows a list of the pending payments. Click the "Make Payment" link to process and record a payment. Use the filter options to limit the number of payments listed.

Filter Payment List

Include Everyone
 Members Only
 Non-members Only

Last Name

Search Results (3 items found)

◀ Prev Page 1 of 1 Next ▶

Name	Member?	Amount	Maintain
Smith, Jan	Yes	30.00	Make Payment
Smith, Jessica	Yes	115.00	Make Payment
Smith, Joe	Yes	30.00	Make Payment

Figure 13.1 – Pending Payments

This screen shows everyone who owes money to the club, both members and non-members. This screen can be used when payments arrive in the mail or are handed over at an event.

Use the filter options at the top of the page to limit the names shown in the grid. For each entry in the grid, the system shows the name, whether that person is a member or non-member and the amount owed.



If your club or association has subgroups, this screen is available to subgroup administrators. It will automatically be filtered to just the members or non-members assigned to the subgroup(s) managed by that administrator.

² QuickBooks is a registered trademark of Intuit Corporation.

Processing Payments

Click the **Make Payment** link to be taken to the Pending Payments screen for that member or non-member.

Home • Control Panel • Pending Payments • Make Payment

Make Payment for dan j nitzel (89)

The list below shows outstanding payments due for the current member. Use the checkboxes to select which payments to make. Then, make a choice in the "Select Payment Method" dropdown list. If paying by credit card, enter the required information, and press the "Submit Payment" button. Please allow a minute or so for the transaction to complete.

If paying by check, enter the check number and adjust the payment date if necessary. Press the "Submit Payment" button.

Fields marked require an entry. Click to change amount.

[Print Invoice](#)

Sign Up (12/17/2005) Due \$ 55.00 Pay \$ **55.00**

Adult	30.00
Season Ticket Pass	25.00
Transaction Total:	55.00

Total Selected For Payment

Select Payment Method

Review the payments due, and select the items you wish to pay for now. Then, select a payment type and follow the instructions provided.

Refund Policy: The refund policy is set by Northwestern Balloon Club. Refund requests must be directed to Northwestern Balloon Club - they cannot be handled by ClubExpress.

Figure 13.2 – Make Payment

This screen shows one or more payments pending, including the detail for each. Each payment is checked by default, but you can uncheck individual payments to change the total selected for payment.

Partial Payments



Some event registrations allow a partial payment to be made. If you see a pencil icon beside the transaction amount, click it to modify the amount. You will see a recommended payment amount. The system will also enforce a minimum payment amount that is set for each event.



Type the partial payment amount and press *[Tab]* or click off the field. You can also click the undo icon to revert to the original amount owing.

Payment Method

As an administrator you can choose from multiple “payment” methods:

- Credit card processed through ClubExpress;
- Credit card not processed through ClubExpress;
- Member check payable to club;
- Cash received by club;
- Write-off (Bad Debt - uncollectible);
- Comp (pending payment is forgiven with \$zero paid);
- Processed by a separate system.
- Payment from subgroup

Enter the additional information requested and click **Submit Payment** or **Record Payment** to complete the payment process.

Note that your club or association may have chosen to disable checks or credit cards. However, these options will always be displayed for administrators.

OPEN CREDITS

When you select this option, you will see a screen similar to the following:

Date	Member	Credit For	Status	Amount	Balance	Edit
3/31/2008	Sara A Ballard	Volunteering at new-member orientation	Available	\$ 20.00	\$ 20.00	Edit
1/20/2008	Dan Ehrmann Jr	Volunteering	Partial	\$ 25.00	\$ 15.00	Edit
3/14/2008	Todd Peterson	N/A	Available	\$ 400.00	\$ 400.00	Edit
7/10/2009	Martin D Smith	Reimbursement of club expenses	Available	\$ 10.00	\$ 10.00	Edit
Credits Total				\$ 455.00	\$ 445.00	

Figure 13.3 – Open Credits

This screen shows open credits, including the date, member, description, status and amount. You can add a credit or edit an existing open credit. Click the **Add Credit** button to see the following screen.

Northwestern Balloon Club - Windows Internet ...

Edit Credit

Name Jones, Barbara(2) [Select Member](#)

Date 7/14/2009

Amount \$ 20.00

Credit Type Overpayment

Description Registered as a non-member instead of as a member

Account Master Event Registrations

Save ✓ Cancel ✕

Figure 13.4 – Add Credit

Click the **Select Member** link to display the member selector. Specify the other fields the click **Save** to create the new credit or **Cancel** to close without saving.

Click the **Edit** link to modify an existing credit. You will see a screen similar to the following:

Northwestern Balloon Club - Windows Internet E...

Edit Credit

Credit Issued To: Sara A Ballard
Status: Available
Amount \$ 20.00 Balance \$ 20.00

Select Action Edit

Date 3/31/2008

Amount \$ 20.00

Credit Type For Services

Description Volunteering at new-member orientation

Account Master Membership Dues

Save ✓ Cancel ✕

Figure 13.5 – Edit Credit

There are four available actions:

- **Edit** – change the various properties of the credit.
- **Refund** – mark the remaining balance of the credit as having been refunded to the member. Note that no credit is actually issued by ClubExpress; the actual refund must be handled by the club’s treasurer.
- **Waive** – this option marks the remaining balance of the credit as waived, which means that the member has elected not to use it.
- **Cancel** – if no part of the credit has been applied, this option deletes it. If the credit has been partially applied, the amount will be changed to the applied amount, canceling the remaining balance.

Click **Save** to save your changes and return to the Open Credits screen, or **Cancel** to return without saving.



If your club or association has subgroups, subgroup administrators can access open credits but will only see credits for their members.

BANK ACCOUNTS

Clicking this choice displays the following screen:

Account Name	Level	Status	Maintain
Acme Account	Association	Closed	Re-activate
Club Account	Association	Closed	Re-activate
New Account	Association	Changed	Verify Close
TestAcct (Primary)	Association	Active	Edit

[Return to Previous Page](#)

Figure 13.6 – Bank Account Administration

This screen shows the bank accounts defined for your club or association. For tax reasons, some clubs and associations deposit membership dues in one account and event registrations, donations, etc. into different accounts. You can also specify accounts belonging to different organizations (such as a state or

national “parent”) and configure ClubExpress so that payments are distributed into multiple accounts.

Each club has one designated “Primary” account that is used for all transactions if specific separate accounts have not been defined (see below). The primary account cannot be deleted but it can be changed at any time.

Whenever an account is entered or modified, two test transactions (one a withdrawal and one a deposit, each for the same, randomly generated amount under \$1.00) are created. These transactions are processed to the account and must be verified by you to activate or re-activate the account.

Accounts have various status codes:

- **New** indicates a new account that must be verified. Click the **Verify** link to enter the amount of the test transactions. If the amount is correct, the status will change to **Active**.
- **Active** indicates an account that can be used for transactions. Click the **Edit** link to modify the account, which changes its status to **Verify**.
- **Changed** indicates an existing account that has been modified. Click the **Verify** link to enter the amount of the test transactions. If the amount is correct, the status changes back to **Active**.
- **Closed** indicates an existing account that is no longer in use. Click **Re-Activate** to reactivate the account.

Click the **Add Bank Account** button to add a new account. The following screen is displayed:

Windy City Morgan Owner's Group - Windows Internet Explorer

Bank Information

ClubExpress collects membership fees and deposits them automatically in your bank account. We also withdraw our monthly fees directly from your bank account. In order to do this, we need to have details of your bank and account. When this information is provided or updated, a small test transaction will be performed to ensure that we have the correct data. Please enter the information requested and click "Save" to return to the Finance and Accounting menu.

Fields marked * require an entry.

This is your primary bank account.

Descriptive Name *

Account For

QuickBooks® Account Name *

Name on Account *

Bank Name *

Routing Number * How do I find this?

Account Number *

Account Type Checking Savings *

Account Class Business Personal *

Figure 13.7 – Bank Information

This screen gives us at ClubExpress the information we need to perform these transactions. The following information is required:

- Account Title is your internal name for this account. It's used within ClubExpress only to distinguish one account from another.
- Bank name
- Bank routing number
- Account number
- The name on the account
- Whether this is a checking or savings account
- Whether this is a business or personal account.
- Whether this is the primary (default) account for your club or association.

QuickBooks

If QuickBooks integration is enabled, you will also specify the name of this bank account in QuickBooks. Be sure that the spelling is identical to the bank account name on your QuickBooks Chart of Accounts. (See Appendix B for more information.)

The best source for the bank routing number and account number is a check. Compare a check with the following figure to locate each item.

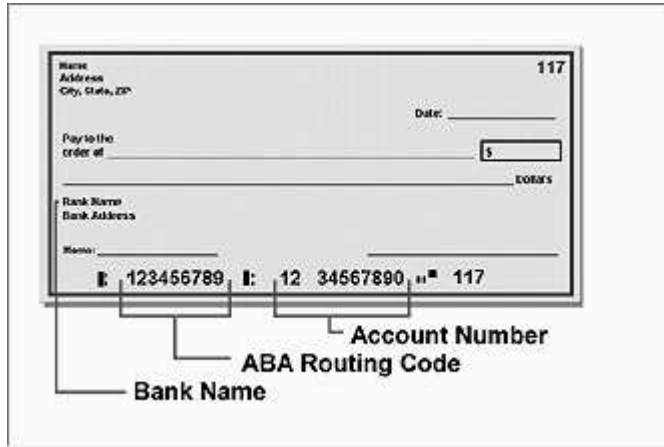


Figure 13.8 – Finding bank and account information on a check.

However, please note that some banks use different routing numbers and account numbers for electronic transactions. If we notify you that the initial tests did not go through, you will need to contact your bank to verify the correct information to use.

If there is any doubt as to whether your organization’s bank account is a “business” or “personal” account, specify Personal. Click **Save** or **Cancel** to return to the previous screen.

When you click the **Verify** link, the following screen is displayed:

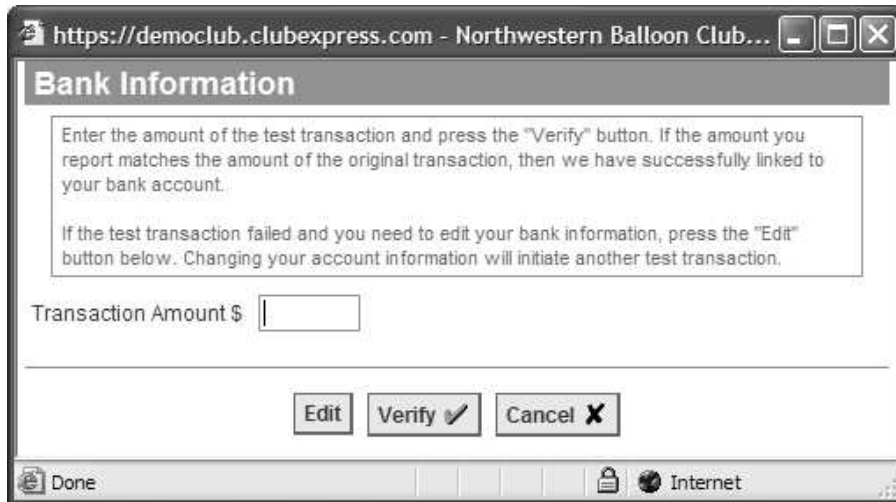


Figure 13.9 – Verify test transaction amount

The amount will be the same for the test deposit and test withdrawal, under \$1.00. It can be entered as a decimal or a whole number (e.g. 0.64 or 64). Click **Verify** to complete the verification. Click **Edit** to switch to the screen shown in Figure 13.3 if you need to review or change the bank information.

Close

Click the **Close** option to close an active account. Closed bank accounts don't appear in drop-down lists. Re-activating a closed bank account generates new test transactions that must be verified before the account can be used.

Bank Accounts for Subgroups



If your club or association has subgroups, you can define bank accounts for each subgroup on the Add/Edit page. Funds collected for each subgroup will automatically be directed to that subgroup's bank account. However, bank accounts must be defined by a club administrator or control panel coordinator with access to this function; for security reasons, they cannot be defined at the individual subgroup level.

BANK ACCOUNT ACTIVITY

Clicking this choice displays the following screen:

Home • Control Panel • Bank Account Activity

Bank Account Activity

Specify filter parameters and click the "Search" button to display matching transaction categories. Certain types of transactions support drill-down to view the details; click the "Details" link to display this information.

Bank Account:

Time Period:

Transaction Type:

Sort By:

Date	Transaction Type	Bank Account	Amount	Details
3/25/2004	Collect Fees	Club Account	(\$3.50)	Details
3/25/2004	Setup Fee	Club Account	(\$150.00)	
3/25/2004	Test Credit	Club Account	\$1.18	
3/25/2004	Test Debit	Club Account	(\$1.18)	
Total			(\$153.50)	

Figure 13.10 – Bank Account Activity

Use this screen to view and audit transactions performed through ClubExpress and on your bank accounts. It is especially useful when you need to reconcile our records with monthly bank statements and accounting system. Specify the filter criteria, including bank account, time period and transaction type, as well as the sort order, then click **Search**.

The following transaction types may be listed:

- Test Credit;
- Test Debit;
- Setup Fee (Withdrawal);
- Collect Fees, including debit adjustments, credit card fees, logistics services, custom programming and our monthly fee;
- Remit Collected Funds, including credit adjustments.

Some of these choices are self-evident and no further information is necessary. Other choices have additional information, which is accessed by clicking the **Details** link. A report will be displayed showing the detailed line items that comprise this transaction.



If your club or association has subgroups, subgroup administrators will only see bank accounts belonging to the subgroups they manage.

Understanding ACH Transactions

ACH stands for Automated Clearing House, a method for securely transferring money between banks and bank accounts that is managed by NACHA, the National Automated Clearing House Association.

When we collect money on your behalf through credit card transactions on the website, this money is deposited into our bank account two business days later. This money is then held for at least one more business day before it's available to be sent to you. This hold allows for potential problems with the transaction, or for members who decide that they don't want to sign up for membership or register for the event after all.

Then, three times a month, on the 10th, 20th and last day of the month, we initiate ACH transactions to transfer the funds we've collected on your behalf to your bank account(s). For example, because of the three-day hold, on the 20th of the month, we will remit funds collected between the 8th and the 17th of the month inclusive. If the 10th, 20th or last day falls on a Saturday or Sunday, we will generally do the ACH transaction on the preceding Friday.

For each club or association, we remit the funds to you and then withdraw credit card fees as a separate transaction. It's done this way for accounting purposes, to give you the flexibility of deciding in which account to record the fees.

Our monthly fee is charged at the end of the month as part of this last day transaction. It covers the following month of service.

FINANCIAL ACCOUNTS

When you select this option, a screen similar to the following is displayed:

Home • Control Panel • Financial Accounts

Financial Accounts

Club Accounts

This screen allows you to define financial accounts for your club. Click Add Account to add an account, or Edit to update an existing account. Delete can only be selected if the account is not in use.

Add Account

Name	Account #	Type	Maintain
Annual Banquet	123	Master Event Registrations	Edit Delete
Club Regalia and Logoware	2301	Master Merchandise	Edit Delete
Fund-raising events	1235	Master Event Registrations	Edit Delete
Jamboree 09		Master Service Fees	Edit Delete
Slush Fund	0013579	Master Membership Dues	Edit Delete
Social Events	1234	Master Event Registrations	Edit Delete

Master Accounts

Click Edit to update the Quickbooks Account Name and Account Class for the corresponding Master Account.

Name	Type	Maintain
ClubExpress Processing Fees	Expense	Edit
Credit Card Processing Fees	Expense	Edit

Figure 13.11 – Financial Account Administration

Financial accounts are a powerful reporting and analysis tool for all financial transactions. They allow you to organize individual line items into specific buckets for aggregation purposes. They also link transaction line items and payments to bank accounts, allowing you to distribute funds into different accounts, including accounts belonging to parent organizations (such as a national association.) Select **Add Account** to see the following screen:



Figure 13.12 – Add/Edit Financial Account

For each account, enter the account name and a number, as well as the master system account into which this account should aggregate. The system accounts cannot be changed; they represent the major modules in ClubExpress (membership, events, donations, merchandise, etc.) You can also specify the primary bank account or a different bank account into which funds assigned to this financial account should be deposited.

QuickBooks

If QuickBooks integration is enabled, you will also be asked to specify the QuickBooks account name and class name. The spelling of each name must be identical to its spelling in QuickBooks (excluding account numbers.)

Note also that the ClubExpress account name field is limited to 50 characters. If your QuickBooks account names are longer than this, including sub-accounts, they may need to be shortened to fit.

You must specify a QuickBooks account name for every ClubExpress financial account, even the ones you are not using. Otherwise, the export process will not work. See also Appendix B for more information on integrating ClubExpress and QuickBooks, including how to specify sub-accounts.

Click **Save** to save your changes and close the dialog, or **Cancel** to close without saving. Click **Edit** to edit information on an existing financial account. The **Delete** option is only available if the financial account is not in use.

QuickBooks

If QuickBooks integration is enabled, the main screen will have a second grid below it, where you can specify your QuickBooks account names and class names for the system master accounts. Click **Edit** to see the following screen:

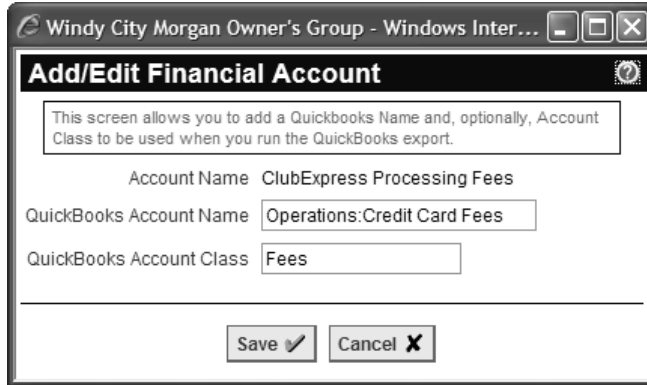


Figure 13.13 – Edit System Financial Account

Enter the QuickBooks account names and click **Save**, or click **Cancel** to close the dialog without saving.

Again, you must specify a QuickBooks account name for every ClubExpress financial account, even the ones you are not using. Otherwise, the export process will not work. See also Appendix B for more information on integrating ClubExpress and QuickBooks, including how to specify sub-accounts.

Note also that the ClubExpress account name field is limited to 50 characters. If your QuickBooks account names are longer than this, including sub-accounts, they may need to be shortened to fit.

QUICKBOOKS EXPORT

For more information on exporting transaction data from ClubExpress and importing it into QuickBooks, see Appendix B.

Before you start exporting transactions, credits and payments from your ClubExpress website and importing this data into QuickBooks, we **strongly** suggest that you experiment with a **copy** of your main “company” file or with an empty file. A single import of just one month of data could make dozens of changes to multiple accounts; you should be absolutely sure that everything is properly configured and that data is imported as you are expecting. You must also configure the QuickBooks account names for your bank accounts and financial accounts.

QuickBooks

If QuickBooks is enabled on the **Finance Options** page, you will see this option on the Control Panel. Select it and you will see a screen similar to the following:

Home • Control Panel • Club Admin

QuickBooks® Export Administration

Specify filter parameters and click the "Search" button to display matching exports.

Type of Export: < All Export Types > ▼

Time Period: Last 7 Days ▼

Search ⚡

New Export

Search Results

Date Exported	Export Type	From	Through
11/25/2008	Club Transactions	01/01/2008	11/24/2008
11/25/2008	User Credits	01/01/2008	11/24/2008
11/25/2008	User Payments	01/01/2008	11/24/2008
11/25/2008	User Transactions	01/01/2008	11/24/2008

Return to Previous Page

Figure 13.14 – QuickBooks Export Administration

To see previous exports, select the type and time period and click **Search**. You will see a list of matching exports.

To generate a new export, click the **New Export** button. You will see the following popup window:

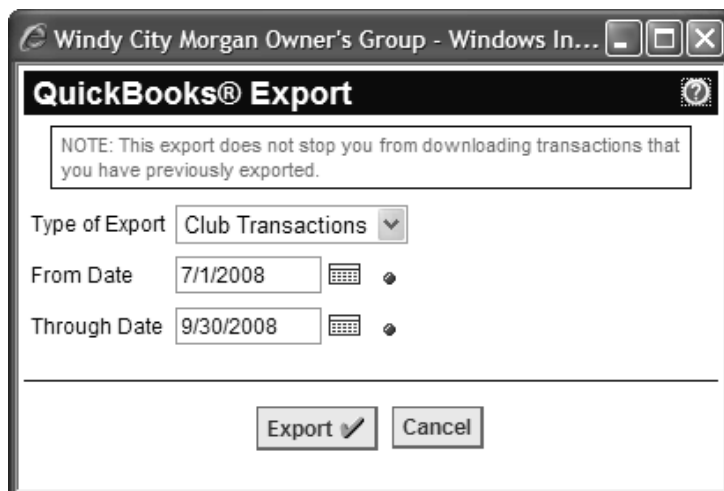


Figure 13.15 – New QuickBooks Export

Select the type of export from one of the following choices:

- Members and Non-Members (QuickBooks “Customers”)
- User Transactions
- User Payments
- User Credits
- Club Transactions

Specify the date range you want to export then click the **Export** button. Your browser will prompt you to save the .IIF file (Intuit Interchange Format) to your local hard disk, from where you can import it into QuickBooks. The name of the file will describe the type of export and date range specified.

The date range is queried based on “date entered”, a hidden field in the system which tracks when a transaction, payment, credit or fee was actually recorded. This may be different from the date entered by the user or administrator; ClubExpress allows you to enter any date when you are recording an item (for example, to record that a check was received earlier than when the database was updated.) In the export, the date entered will be in the memo field.

Important Note: ClubExpress and QuickBooks do not stop you from importing the same transactions into QuickBooks more than once. You need to be very careful to import only discrete date ranges and export types into your active club or association QuickBooks file.

Note also that you cannot specify today’s date as the Through Date. The reason is that you might miss some transactions or payments if they occur today but after the export was processed.

CLUBEXPRESS RATES

Clicking this choice displays the following screen:

Home • Control Panel • ClubExpress Rates

ClubExpress Rates

Monthly Fees

Fees charged by ClubExpress each month.

Item	Fee	Notes
Primary Membership Rate	\$ 0.40	(per member, per month)
Sec. Membership Rate	\$ 0.20	(per member, per month)
Minimum Monthly Fee	\$ 10.00	

Credit Card Processor Fees

Fees charged by our credit card processor. These fees are passed through at cost, without markup.

Card Name	Transaction Fee	Percentage Fee	Enabled?
Visa	0.20	2.3900 %	Yes
Master Card	0.20	2.3900 %	Yes
American Express	0.20	3.3000 %	Yes
Discover	0.20	2.7700 %	Yes

Misc. Processing Fees

Additional fees charged by ClubExpress.

Item	Fee	Notes												
Initial Setup Fee	\$ 150.00	One-time charge, covering assistance with setting up your club and loading your membership database.												
Check Processing Fee	\$ 0.50	For checks handled and deposited by ClubExpress												
Credit Card Chargeback	\$ 15.00	A chargeback is a credit card transaction which is cancelled by the user after being processed by the system. This typically happens when the user does not recognize "ClubExpress" on their credit card statement. This fee is charged to us by the credit card processor, and is not refunded even if the user approves and reinstates the charge. This fee is passed through at cost.												
Mailings		Built-in mailings, such as printed renewal notices, are charged at postage plus 20c.												
Logistics Fees	TBD	Logistics fees cover handling and/or producing physical materials (such as membership cards, newsletters, etc.) which you have contracted to ClubExpress. Other items will be quoted on request.												
Bank Fees	\$ 6.00	When an ACH fails, the bank charges us this fee and we pass it through to you.												
Non-Member Technology Convenience Fee		<p>This is the fee we charge to non-members when they pay for an event registration or make a donation online by credit card.</p> <table border="1"> <thead> <tr> <th>Payment</th> <th>Fee</th> </tr> </thead> <tbody> <tr> <td>Up to \$ 10.00</td> <td>\$ 1.00</td> </tr> <tr> <td>\$ 10.01 to \$ 50.00</td> <td>\$ 2.00</td> </tr> <tr> <td>\$ 50.01 to \$ 250.00</td> <td>\$ 3.00</td> </tr> <tr> <td>\$ 250.01 to \$ 500.00</td> <td>\$ 4.00</td> </tr> <tr> <td>\$ 500.01 and higher</td> <td>\$ 5.00</td> </tr> </tbody> </table>	Payment	Fee	Up to \$ 10.00	\$ 1.00	\$ 10.01 to \$ 50.00	\$ 2.00	\$ 50.01 to \$ 250.00	\$ 3.00	\$ 250.01 to \$ 500.00	\$ 4.00	\$ 500.01 and higher	\$ 5.00
Payment	Fee													
Up to \$ 10.00	\$ 1.00													
\$ 10.01 to \$ 50.00	\$ 2.00													
\$ 50.01 to \$ 250.00	\$ 3.00													
\$ 250.01 to \$ 500.00	\$ 4.00													
\$ 500.01 and higher	\$ 5.00													

[Return to Previous Page](#)

Figure 13.16 – ClubExpress Rates

This is a read-only screen which lists the various rates charged by ClubExpress per member, family member, check processed, etc. It also shows the credit card fees charged to us which we pass through to you, and whether selected credit card types are enabled or disabled.

Important Note: The rates shown on the above screen shot may not be current. Please check the actual screen on your site for the most up-to-date information.

FINANCE OPTIONS

When you select this option, you will see the following screen:

Home • Control Panel • Finance Options

Finance Options

This screen shows the club's financial options. Specify which credit cards your club accepts, if your club accepts payment by check, specify whether members should send checks to the club or to ClubExpress. If you enable QuickBooks Exports, you will see further instructions about the information needed for the exports.

General

Fiscal Year Start: January

Payment Options

Credit Cards Accepted: Visa MC AmEx Discover

Non-member Credit Card Fee: Charge to User Charge to Club

Checks: Mail to Club Mail to ClubExpress
(an additional processing fee applies for checks mailed to ClubExpress)

Handling Credits: Credits are used only by the member who earned them
 Credits are shared by all members in the same account

QuickBooks Settings

Enable QuickBooks Exports

The following information is needed for your QuickBooks Exports to function. In addition, you must enter Account Names for your bank(s) and financial accounts on the Bank Accounts and Financial Accounts screens.

Use Class Tracking

Customer:Job name format First Last Last, First

Company file is configured to use Sales Tax

Export payments processed by ClubExpress into: Bank Account(s) Undeposited Funds

Account Names

Accounts Receivable:

Bad Debt:

Comps:

Undeposited Funds:

Subgroup Funds:

Item Names

Sales Tax:

Shipping and Handling:

Figure 13.17 – Finance Options

Fiscal Year Start

Select the month in which your fiscal year begins. The default is January. Fiscal year is used on some reports to categorize transactions and payments.

Credit Cards Accepted

Select which credit cards you want to accept. The fees for American Express cards are slightly higher than for Visa, MasterCard and Discover.

Non-member Credit Card Fee

When non-members register for events and pay online by credit card using the ClubExpress merchant account built into your website, ClubExpress charges a Technology Convenience Fee using the following schedule.

Event Cost	ClubExpress Fee
Up to \$10.00	\$1.00
\$10.01 to \$50.00	\$2.00
\$50.01 to \$250.00	\$3.00
\$250.01 to \$500.00	\$4.00
\$500.01 and higher	\$5.00

By default, the fee appears as a special line item on the payment page if the person registering for the event is not a club member (or if it's an admin registering a non-member), the payment method is credit card, and the club is using the merchant account built into ClubExpress. Note that the fee is not charged if any one of these circumstances is not in effect.

You also have the option of hiding this fee from users. It will still be charged but instead will be taken out of the cost of the event to be paid to the club. If you do so, be sure to increase the non-member cost of the event slightly so that it allows for this fee to be charged.

Checks

Decide if you want checks mailed to the club's official address or to ClubExpress. This setting changes the address that appears when members and non-members choose to print an invoice and mail a check.

If checks are mailed to us, we process them through the system and deposit them in our cash-management bank account. The funds are then remitted to you at the same time as funds collected via credit card payments. (If the check does not include "ClubExpress" as a Payable To name, we process it but then hold it until the end of the month when we send all such checks to you for deposit.)

Note that there is a small additional fee for this service.

Handling Credits

For clubs and associations with multi-person memberships, you can make credits available to every person within the membership. The default is that credits are only available to the member who earned them. If you choose to allow credits to be shared within the same account, then they will appear on the payment page for any member (primary, secondary or tertiary) within that account.

QuickBooks Settings

QuickBooks

Check the box to enable QuickBooks data exports. Note that there is a separate one-time setup fee for enabling QuickBooks functionality. You will see a warning message and if you elect to continue, this fee is charged automatically.

For more information on exporting transaction data from ClubExpress and importing it into QuickBooks, see Appendix B.

Before you start exporting transactions, credits and payments from your ClubExpress website and importing this data into QuickBooks, we **strongly** suggest that you experiment with a **copy** of your main “company” file or with an empty file. A single import of just one month of data could make dozens of changes to multiple accounts; you should be absolutely sure that everything is properly configured and that data is imported as you are expecting. You must also configure the QuickBooks account names for your bank accounts and financial accounts.

The following options can be configured:

- Check the box if you use QuickBooks classes to categorize your revenue and expenses. The default is No.
- In QuickBooks, each member or non-member is treated as a “customer”. QuickBooks will attempt to match transactions to existing customers if possible, based on the customer name. Specify the format used for these names. Note that the user’s middle initial is included in the name field.
- If your QuickBooks company file is configured to use sales tax, check this box. The system will use a slightly different format for export files that is compatible with sales tax being tracked, even if most transactions (membership, event registration, etc.) don’t have sales tax.
- Next specify whether collected funds are recorded as being deposited directly into bank accounts or whether they are recorded as being deposited into the standard “Undeposited Funds” account. This setting only affects funds which are collected through ClubExpress:
 - Using the built-in merchant account; or
 - Checks mailed to ClubExpress that we process for you.

This setting does not affect funds that you collect directly:

- If you have your own merchant account;
 - Cash;
 - Checks paid directly to the club;
 - Payments made through a “separate system”.
- Specify the names used for various standard accounts in QuickBooks. Be sure that the name is spelled exactly as shown in your QuickBooks Chart of Accounts.
- Specify the item names used for Sales Tax and Shipping and Handling.

Click **Save** to save your changes and return to the Control Panel, or **Cancel** to return without saving.

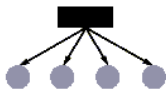
Chapter 14 – Control Panel – Data Export and Reports

DATA EXPORT

ClubExpress allows you to export your organization's data to a local file for archival purposes or to interface with other software. You can perform this task at any time; for active clubs, we recommend doing it at least once a month. When you select this option, the following screen is displayed:

Figure 14.1 – Data Export

Select an option from the list and click the **Export** button. You will be prompted to save the results to a local file. Data are saved in CSV format (Comma Separated Values), with one record per row, commas between fields, and quotation marks around text values. The first row contains field names. CSV files can be opened in Notepad or any word processor; they can also be read by spreadsheets such as MS Excel or databases such as MS Access, Corel Paradox, or FileMaker Pro.




If your club or association has subgroups, full admins can optionally filter the export based on any level of subgroup. Subgroups administrators will export only the members of their subgroup.

If you select one of the financial transaction options, an additional panel will appear to allow you to specify a date range.

Select Date Range

You may select a date range to reduce the amount of data included in your export. Leave the start date blank to include all back to the earliest data. Leave the end date blank to include up to the most current data.

Start Date 


End Date 

Figure 14.2 – Select Date Range panel

Note that data exports can also be found in other parts of the system, specifically in the event calendar and on the **Control Panel – Additional Member Data** screen, where you can export member answers to club-specific questions in a *crosstab* format.

REPORTS

ClubExpress includes an extensive reporting capability, allowing club administrators to generate reports about every aspect of club operations, including membership, finances and website usage. Selecting **All Reports** from the Control Panel menu displays the following screen (which will evolve as new reports are added):

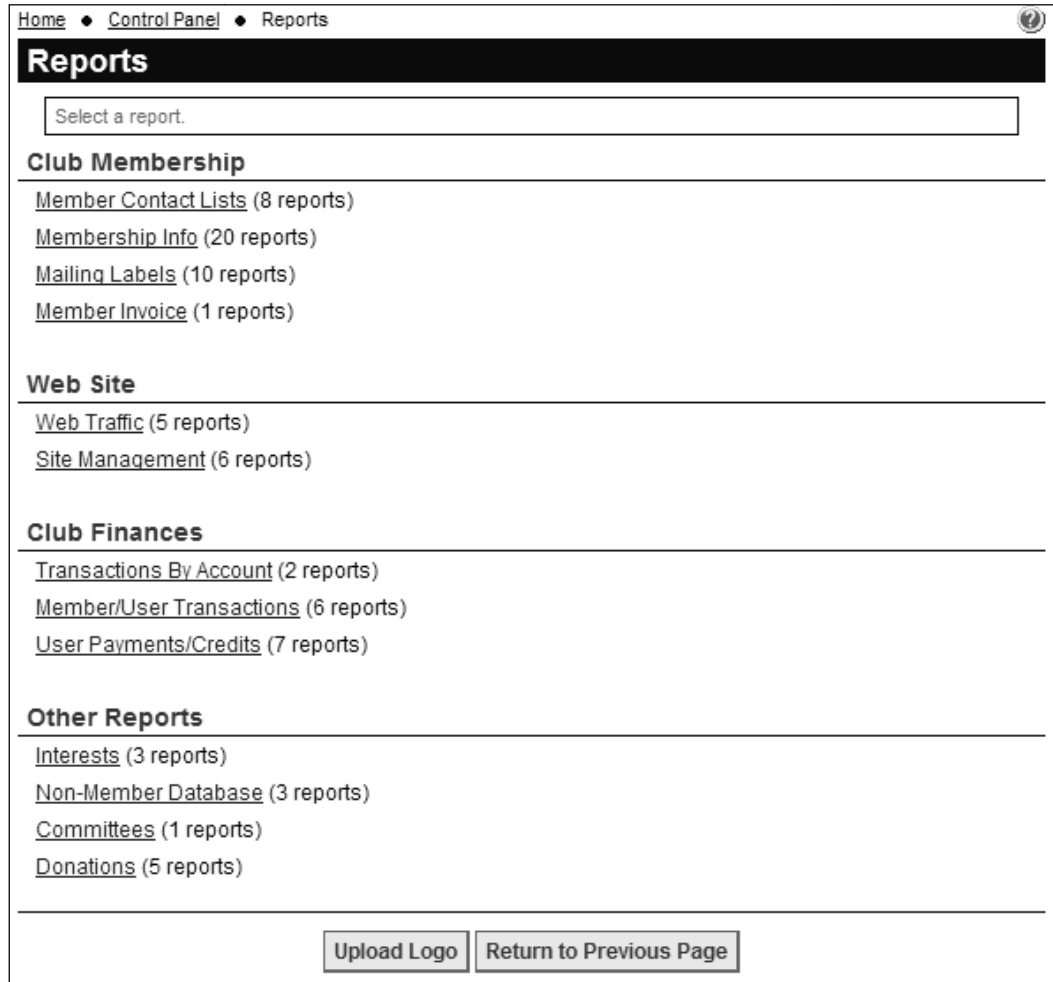


Figure 14.3 – All Reports

Reports are organized into categories. Clicking a link displays a series of dialogs that allow you to select an individual report and then specify report sorting, filtering, formatting and output options. For example, clicking **Member Contact Lists** displays a window similar to the following:

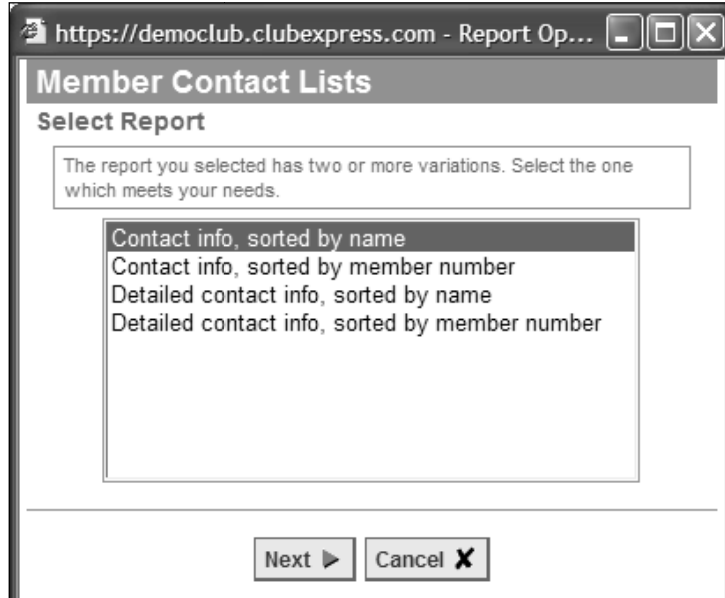


Figure 14.4 – Member Contact Lists

Select the report you wish to view then click **Next**.

Subgroup Filtering

For many reports, the next screen allows you to filter the report based on a subgroup. For example, you could look at members just in the Midwest region, or transactions generated just by the CA district. You will see a screen similar to the one shown below:

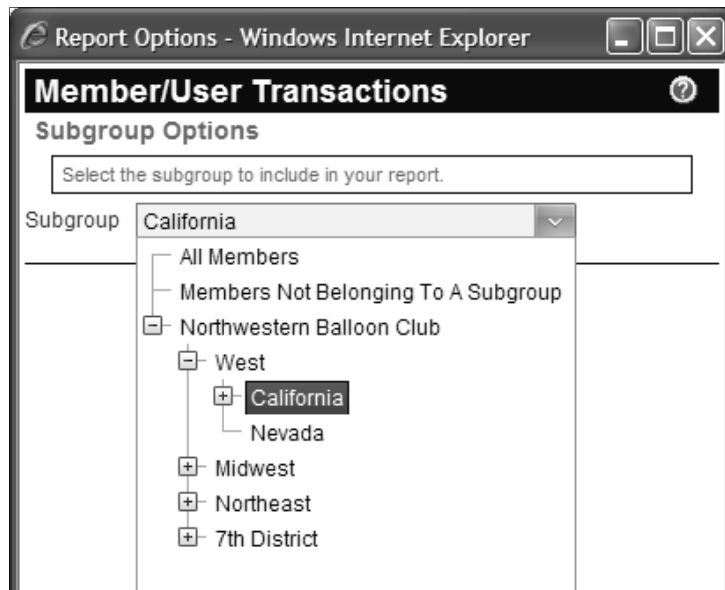


Figure 14.5 – Subgroup Options

Click the drop-down arrow then navigate the tree to the subgroup you want, or select one of the special options. Click **Next**.

Membership Reports

For all club membership reports, the next screen is shown below:

Figure 14.6 – Member Options

Membership reports can be filtered by **Member Status**:

- “Active Members” are those who are fully paid up in their membership.
- “New Members with Payment Pending” are those who opted to send in a check. Once it is received, you can manually switch their membership to Active.
- “Expired Members” are those who have allowed their membership to lapse and who are flagged as expired by the system (based on the rules that you specify) or manually by the Membership VP.
- “Other Inactive Members” includes members who have been “bulk loaded” into the system when a club is first set up in ClubExpress, but who have not yet received their welcome emails (which triggers activation.) This option also catches members whose accounts have been temporarily frozen for inappropriate behavior.
- “Trial Members” represent a member type with the Trial flag enabled.

Reports can also be filtered by **Member Type**, including all of the types configured for your club or association. You can also include different **Member Levels**:

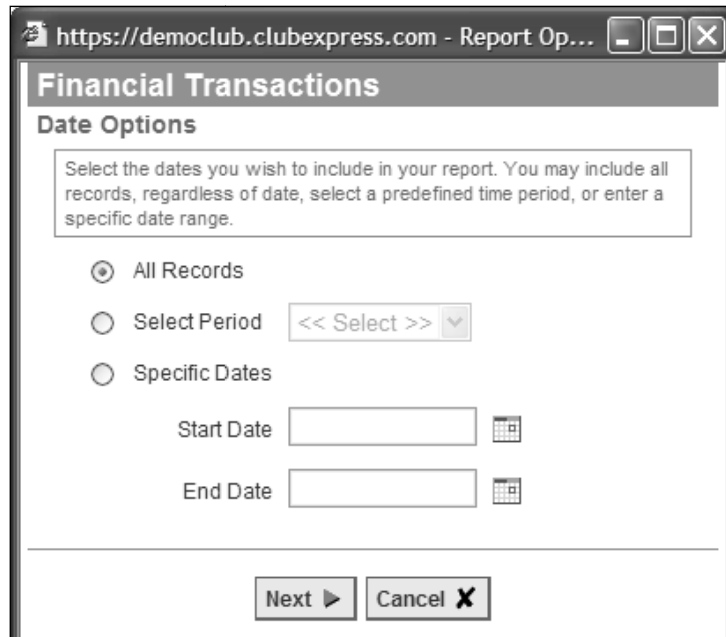
- All members, including solo, primary, secondary and tertiary;
- Solo and primary members only;
- Secondary (family or additional business) members;
- Tertiary members;
- Various combinations of primary and secondary/tertiary.

You can also click a checkbox to filter to only members without an email address. This option is especially useful for mailing labels since the member has not received emailed notices or announcements.

These filters are cumulative; you can specify criteria in any or all of the three areas and all specifications will be applied to generate the final result.

DATE RANGE FILTERING

Some reports can be filtered by a date range. The following screen is displayed:



The screenshot shows a web browser window with the address bar displaying "https://democlub.clubexpress.com - Report Op...". The main content area is titled "Financial Transactions" and contains a section for "Date Options". A text box explains: "Select the dates you wish to include in your report. You may include all records, regardless of date, select a predefined time period, or enter a specific date range." Below this are three radio button options: "All Records" (selected), "Select Period" (with a dropdown menu showing "<< Select >>"), and "Specific Dates". Under "Specific Dates", there are two text input fields for "Start Date" and "End Date", each with a calendar icon to its right. At the bottom of the form are two buttons: "Next" with a right-pointing arrow and "Cancel" with an 'X' icon.

Figure 14.7 – Date Range Filters

This screen allows you to include all records in the report or to filter by a predefined date range (current or previous year or month) or by a user-specified range of dates.

OUTPUT OPTIONS

The final screen before a report is printed is shown below.

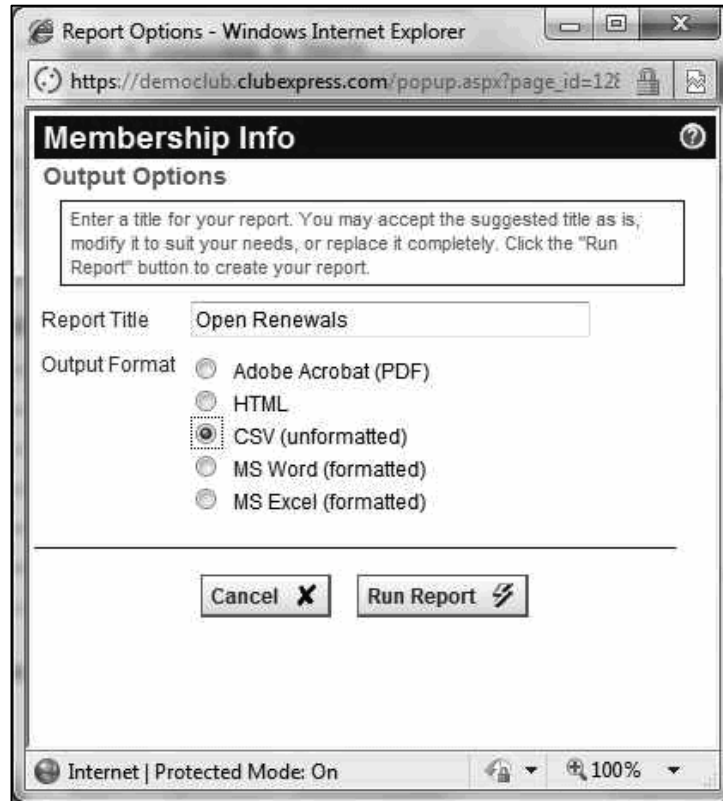


Figure 14.8 – Output Options

Some reports allow you to customize the report title. This text box will be grayed out if this option is not available.

With the exception of mailing labels, you have five options for outputting reports:

- Adobe Acrobat (PDF)
- HTML
- CSV (unformatted, suitable for importing into Excel)
- MS Word (must be installed on the client computer)
- MS Excel (must be installed on the client computer)

Click **Run Report** to display the report. The PDF and HTML options will be displayed in a popup window. If you select the CSV, Word, or Excel options, you will be prompted to open the file or save it to your local hard disk.

Using the PDF option allows you to save the report to disk, print it to any connected printer, or forward it via email to any appropriate user. HTML appears quickest since no external program is required. The Word and Excel options are fully formatted; if you want an unformatted list, select CSV then open the resulting file in Excel.

If the popup report results window does not appear, your popup blocker may be blocking it. Try holding the *[Ctrl]* key while you press the **Run Report** button, then releasing the key when the window appears. Also check that you do not have two or more popup blockers active at the same time, since they can conflict with each other. Your browser has a built-in popup blocker but if you've installed any add-in toolbars (Google, Yahoo, etc.) it will have a popup blocker as well. Disable all but one of them.

Important Note re Mailing Labels

When printing mailing labels to PDF, be sure to set Acrobat's printer options to print the labels at full size. If you are using Acrobat 5, uncheck the options to shrink or expand pages to paper size in the "Copies and Adjustments" section of the print dialog box. For Acrobat 6, set the "Page Scaling" option to "None" in the "Page Handling" section. Other versions will have similar wording.

UPLOAD LOGO

All reports except mailing labels have space for the organization's logo in the top right corner. To upload a logo for this purpose, click the **Upload Logo** button on the main reports screen. The following popup screen is displayed:

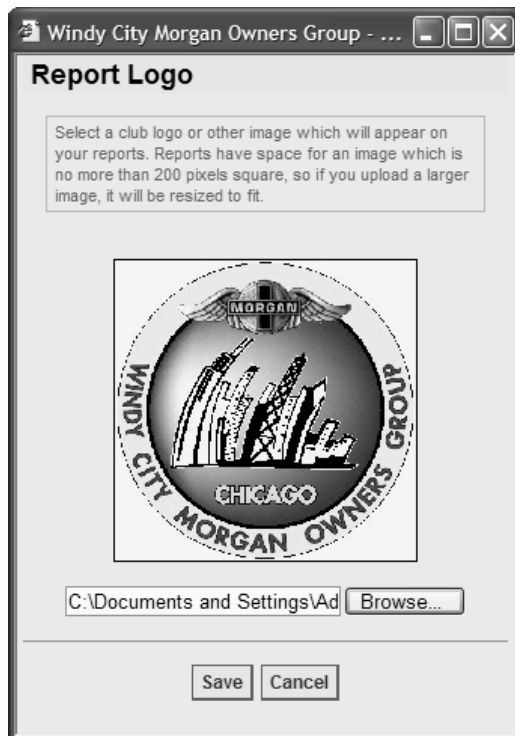


Figure 14.9 – Report Logo

Enter the path to the logo or click **Browse** to select a file. The logo is displayed in the window. Click **Save** to save the logo or **Cancel** to cancel without saving.

CUSTOM REPORTS AND EXPORTS

ClubExpress supports custom reports and data exports which are developed for one club or association only. (A one-time programming fee may apply.) If your organization has any of these reports, they will be grouped into a special category at the end of the list of standard reports. Exports will appear at the end of the export list.

Chapter 15 – Admin Features Without a User Interface

INTRODUCTION

This version of ClubExpress includes a number of features that do not currently have a user interface. These features were added in response to specific requests from our customers. Please contact us if you wish to enable these features for your club or association.

Custom Member Signup Wizard Screens

The member signup and renewal wizard supports the insertion of custom screens for calculating membership fees. If your club or association has special needs that cannot be satisfied by our existing options, please contact us to discuss. Note that a custom programming charge will apply to enable this option since the new screen and its associated administration screens must be designed, programmed and tested before it can be deployed.

Alternate Credit Card Account

By default, clubs and associations that use ClubExpress share a single credit card account, so that transactions appear on the member's credit card statement as "ClubExpress". But for larger organizations, it is often better to have transactions appear on member statements in the organization's name instead of "ClubExpress". This is especially important if you have a strong brand that should be reinforced at every opportunity.

ClubExpress supports the use of your own credit card account. This account can be set up with any merchant processor, but the payment gateway must be Authorize.Net, the gateway that ClubExpress has been written to work with. There is no additional fee from ClubExpress to configure your merchant account; the process takes 5 minutes, after which you should run a small test transaction through the system.

In general, non-profit clubs and associations are welcome to use the built-in merchant account. However, there are number of specific situations where we require that you set up your own merchant account:

- If you are running a membership-based business rather than a non-profit club or association;
- If you want to activate the Storefront module to sell merchandise through your website;
- If you want to accept donations through the Donations module in excess of \$500.

- If you want to enable automated membership billing, where members are renewed automatically and their credit card on file is also charged automatically.

For more information on configuring your own merchant account, see Appendix D of this administrator manual.

At present, we are unable to use alternate merchant processors, PayPal or Google Checkout, although we are planning to add these options in the future.

Spouse / Partner Title

The default prompt for the Spouse/Partner First Name and Spouse/Partner Last Name fields can be changed to drop the “/Partner” text. You can select this option if you believe that referring to “partners” would be inappropriate for your club or association.

Emails sent by the system

All emails sent by the system can be customized at the club level. See Appendix C for a complete list of these emails.

Contact us for more information. We will send you a zip file containing a series of .TXT files. These should be customized using a text editor such as Notepad, and the changed files only sent back to us to be installed on the server.

Interest Members Shown to the Public

You can now configure the Interest Members screen to be visible to the public. This option is useful for clubs that want to share member skills with the public.

JavaScript

By default, JavaScript is turned off on custom web pages. If you add it, the system will strip it out. But for clubs and associations with an experienced web developer, we can enable JavaScript so that it's not stripped out.

Favicon

The Internet allows each website to have its own icon, which appears in the browser's address bar beside the URL and the tab heading for your site. We have a default ClubExpress icon but you can replace it with your own icon. This icon must be 16 x 16 pixels or 32 x 32 pixels and created in the .ico format. Send it to us and we'll install it for you.

Maximum Secondary and Tertiary Members

The default maximum for secondary and tertiary members is 5. Contact us if you need this raised.

Maximum Donation Amount

The default maximum donation amount that can be processed by credit card is \$100. We will raise this to \$500 on request but if you need a higher amount, our policy is to require that you set up your own merchant account (see the section above.)

Upload Hi-Res Bio Photos

By default, when members upload a photo into their bio, its size is adjusted to fit on the screen with the longest dimension no more than 80 pixels. We can set an option that will allow members to upload hi-res photos. The system will store the hi-res image and also generate the screen size. A special option will appear in the Control Panel to download these hi-res images in a ZIP file, for use in a printed member directory.

Automated Membership Payments

ClubExpress fully supports memberships that renew automatically and where a saved credit card is charged. Some types of membership-based organizations (especially membership-based businesses) set up monthly or quarterly memberships that are charged to a saved credit card each cycle until the member explicitly logs in and resigns.

In order to enable this feature, you must have your own merchant account (see the section above) and you must also contact us to explicitly turn it on. Once this is done, you will see an additional option on the Member Type Add/Edit screen (see page 118 for more information.)

Chapter 16 – Content Editor

INTRODUCTION

In a number of places within ClubExpress, you have the opportunity to create a custom web page or part of a page. Two examples are when you are building the website home page and when you are specifying custom web pages.

Instead of forcing you to learn complex HTML coding, ClubExpress makes it easy to build this page, using a software tool called a *content editor* that is similar to a word processor.

The ClubExpress Content Editor allows you to perform the following tasks:

- Select text style, font, size, and color;
- Specify the bold, italic and underline attributes;
- Select background color;
- Indent and outdent;
- Specify left, center, right or fully justified text;
- Specify numbered or bulleted lists;
- Insert horizontal lines;
- Insert and resize images;
- Insert audio, video and Flash images;
- Insert links to other ClubExpress modules, external websites and email;
- Insert and specify the properties of tables and individual cells;
- Use your computer's clipboard, including cut, copy and paste;
- Undo and redo changes;
- Strip formatting from text;
- Insert group boxes;
- Insert special characters;
- Insert "smileys", small graphics designed to display an emotion;
- Convert text to uppercase or lowercase;
- Convert text to superscript or subscript;
- Find and Find & Replace text;
- Create complex styles to explicitly control the appearance of your text;
- Spell check your text;
- View your page in design mode, HTML mode or Preview mode;
- Zoom the text for finer control;
- Print the text being edited;
- Track word and character counts.

More experienced web designers can view and modify the underlying HTML code created when you edit pages with this tool. Experienced designers can also do much of the complex formatting using nested tables to achieve almost any layout effect you want.

USER INTERFACE

When you open the Content Editor, you will see a popup window similar to the one below:

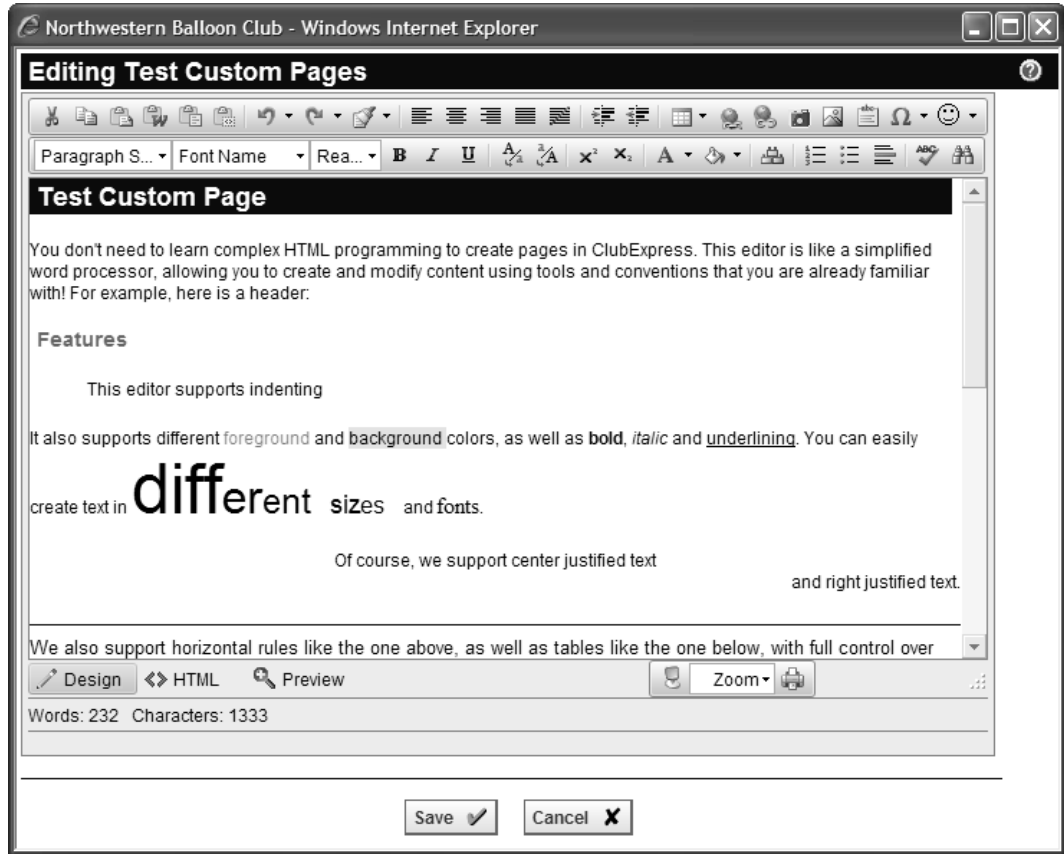


Figure 16.1 – The Content Editor screen

At the top of the screen are two toolbars of buttons, with similar functions grouped logically. The meaning and behavior of each button is described below. Underneath is the edit area, where you type text, highlight blocks, manipulate tables and images and perform other editing functions. At the bottom of edit area is another toolbar with special functions, then a word and character count.

Many functions work on a block of text that has been highlighted by dragging the mouse cursor over the text. The editor also supports “Drag-and-Drop” to move highlighted text from one part of the page to another.










Click **Save** to save your changes or **Cancel** to discard them. You will be asked to confirm a Cancel operation. Both buttons close the window and return you to the previous screen.














Important Note: You should save your work every 15-20 minutes to maintain the currently logged in session. If you don't do this, the system may close the active session and you risk losing all your work. This session timeout varies based on your level of access (for administrators, it's 60 minutes.) The system will give you a warning approx. 5 minutes before a session is due to expire.




TOOLBAR FUNCTIONS

The following table explains each toolbar button. Many use the same icon and perform the same function as a typical word processor such as MS Word. Some functions require a more detailed explanation; these are described in the following sections:


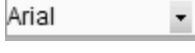








Top Row









	Cut the highlighted text to your computer's clipboard. The shortcut key <i>[Ctrl-X]</i> performs the same function.
	Copy the highlighted text to your computer's clipboard. The shortcut key <i>[Ctrl-C]</i> performs the same function.
	Paste text from your computer's clipboard at the current cursor position. The shortcut key <i>[Ctrl-V]</i> performs the same function.
	Paste text from Microsoft Word, stripping out the overly complex formatting that Word places there.
	Paste plain text from another application. The editor will strip out any complex formatting it finds.
	Paste text in as HTML. The editor will convert the text into simple HTML before pasting.
	Undo one or multiple changes. The shortcut keys <i>[Ctrl-Z]</i> and <i>[Alt-Backspace]</i> perform the same function. Click the reverse arrow to undo the last change or the small down arrow to select which changes to undo.
	Redo the previous Undo. The shortcut key <i>[Ctrl-Y]</i> performs the same function. Click the forward arrow to redo the last undo, or the small down arrow to select which undo point to reverse.
	Strip selected formatting options from the highlighted text. A small drop-down menu will appear, allowing you to choose exactly what should be stripped.

	Left Align the current line or block.
	Center Align the current line or block.
	Right Align the current line or block.
	Fully Justify the current line or block. The editor will insert additional spaces to line up both the left and right margins.
	Unjustify the current line or block. The editor will revert to left justified text, removing any spaces inserted to create fully justified text.
	Indent the current line or block 1 tab stop.
	Outdent the current line or block 1 tab stop.
	Insert or format a table at the current cursor position. A drop-down menu will appear allowing you to paint the rows and columns in the table and to specify other options. For more information on all table functions, see the special section below.
	Click to insert a hyperlink to another ClubExpress module, an external website, an email address or an anchor (bookmark within a page.) The shortcut key <i>[Ctrl-K]</i> performs the same function. For more information, see the special section below.
	Break the current hyperlink, removing the special linking code behind the scenes, The current hyperlink will revert to standard text. The shortcut key <i>[Ctrl-Shift-K]</i> performs the same function.
	Insert a photo from among photos uploaded to the site. For more information, see the special section below.
	Insert an image from your graphics library and other club-level photos (for example, logos). For more information, see the special section below.
	Insert a Group Box (FieldSet). This is a special HTML element that allows you to collect and organize other elements. See the special section below.



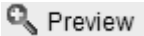

	<p>Insert a Special Symbol. Click the small drop-down arrow to display a popup window of special characters. Click a character to insert it in your text.</p>
	<p>Insert an audio, video or Flash image, or a reference to a YouTube or Vimeo video.</p>
	<p>Insert a “smiley” (aka an “emoticon”), a small graphic to indicate an emotion. Click the small drop-down arrow to display a popup window of smileys. Click one of them to insert it in your text.</p>



Second Row

	<p>Click the drop-down arrow to see a list of built-in styles. Selecting a style ensures that your headings match the styles used elsewhere in ClubExpress. The change applies to the current line or block.</p>
	<p>Click the drop-down arrow to see a list of standard fonts. The change applies to the current line or block.</p>
	<p>Click the drop-down arrow to select a text size. You will see a list of sizes based on pixels; 12px is the standard size.</p>
	<p>Click to bold the current block of text or to start bolding from the cursor position. <i>[Ctrl-B]</i> also works.</p>
	<p>Click to <i>italicize</i> the current block of text or to start italicizing from the cursor position. <i>[Ctrl-I]</i> also works.</p>
	<p>Click to <u>underline</u> the current block of text or to start underlining from the cursor. <i>[Ctrl-U]</i> also works.</p>
	<p>Click to convert the highlighted text to lower case.</p>
	<p>Click to convert the highlighted text to UPPER case</p>
	<p>Click to convert the highlighted text to ^{superscript}</p>
	<p>Click to convert the highlighted text to _{subscript}</p>

	<p>Click to select the text (foreground) color. A color picker showing standard colors will be displayed. You can also define custom colors and add them to the palette. Your change applies to the current block of text or at the cursor position.</p>
	<p>Click to select the background color. The same color picker described above is displayed.</p>
	<p>Click to display a popup Style Builder dialog. This dialog allows you to specify complex style information for the selected text. For more information, see the special section below.</p>
	<p>Click to begin a numbered list of items.</p>
	<p>Click to begin a bulleted list of items.</p>
	<p>Click to insert a horizontal rule across the page.</p>
	<p>Spellcheck your text. A popup dialog will appear to highlight misspellings and other errors. See the section below for more details. The shortcut key <i>[F7]</i> performs the same function.</p>
	<p>Find text on the current page or find and replace. The shortcut key <i>[Ctrl-F]</i> performs the same function.</p>

Options at the Bottom

	<p>Design View. This is the normal view where you write your text and use the shortcut keys and toolbar buttons to insert options and format your text.</p>
	<p>HTML View. This view allows you to see and edit the underlying HTML source code.</p>
	<p>Preview. This view allows you to see the page as it will generally look when it's being viewed.</p>
	<p>Full Screen Mode. This mode makes the edit box slightly larger by hiding all non-editor controls.</p>

	Zoom. Click the drop-down arrow to zoom your text in to see more detail or out to see more of the page.
	Print. Click this icon to print the current page being edited.
Words: 172 Characters: 1685	Displays an approximate word and character count for the current document.

Document Inspector




Figure 16.2 – Document Inspector

Below the word and character counter is a document inspector function. This line will show you the hierarchy of HTML elements in the selected text. The example above has the cursor positioned in the middle of one of the cells and it shows the nested elements leading to the cursor position.

If you select one of the elements, the system will highlight that element. For example, click the “TR” entry and the whole row is highlighted. You can also click the “RemoveElement” option to remove the preceding element, in this case, a font specification.

Insert Event Details

Note: when the content editor is used in the Event Calendar – Emailings function, to send emails to members registered for the event or to members and non-members *not* registered for the event, a special icon is displayed above the top toolbar on the right side:

	Insert the details of the current event into the editor.
---	--

Summary of Shortcut Keys

Ctrl-X	Cut the highlighted text to the Clipboard
Ctrl-C	Copy the highlighted text to the Clipboard
Ctrl-V	Paste from the Clipboard at the cursor position
Ctrl-B	Bold the highlighted text or start/stop bolding
Ctrl-I	Italicize the highlighted text or start/stop italics
Ctrl-U	Underline the highlighted text or start/stop underline
Ctrl-Z	Undo the last operation
Ctrl-Y	Redo the last operation
Ctrl-F	Find or Find and Replace
Ctrl-A	Select All - highlight everything
Ctrl-P	Print the text in the window
Ctrl-K	Insert Hyperlink at the cursor
Ctrl-Shift-K	Break the hyperlink at the cursor
F7	Launch the Spellchecker
F1	Display popup help for the editor
Ctrl-W	Close the editor window

STYLE BUILDER

Highlight a section of your page and click the Style Builder icon to display the popup Style Builder dialog. This dialog allows you to configure the appearance of the highlighted section using almost every possible style option, including:

- Font attributes, size, color and effects;
- Background color and transparency;
- Text alignment, spacing, indentation and flow;
- Content flow, visibility, display and clipping;
- Margins, padding and borders;
- List bullets and numbering, including style and position.

These options are generally for advanced users who understand HTML programming and who want to apply advanced effects to a block of text, a table cell or a list.

UNDERSTANDING GROUPBOXES

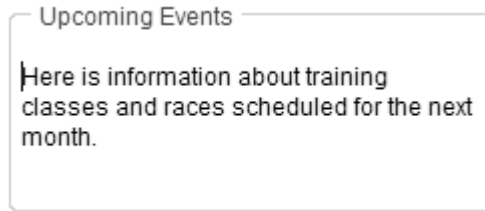


Figure 16.3 – Using a GroupBox Control

When you insert a GroupBox control, the editor adds a blank GroupBox with the opportunity to edit the Title and the Contents. Double-click in each area to edit the text.

Behind the scenes, GroupBoxes are implemented using the HTML `<fieldset>` control. Different browsers handle this control in different ways. In particular, some browsers (for example, Firefox) will use the specified height and width even if the contents of the GroupBox are larger, while other browsers (for example, Internet Explorer) will ignore the specified height and width and dynamically size the GroupBox to fit its contents. Note that this behavior is outside the control of ClubExpress.

When you insert a GroupBox it will have a default width and height, specified by the editor. This is done so that it's visible in the editor and can be selected and edited. In Internet Explorer, you can select the GroupBox and drag it to a larger size; for some reason, this does not work in other browsers. You can also switch into HTML mode and manually adjust the size, which is usually specified in pixels. For example:

```
<fieldset style="width:200px;height:80px;">
```

If you remove either the width or the height, your browser will dynamically size the GroupBox based on its contents. For example:

```
<fieldset style="width: 200px;">
```

specifies a box of 200 pixels wide but the height will be dynamic based on the contents. To allow for the vagaries of different browsers, we suggest that you remove their height: attribute and manually adjust the width: attribute to fit the contents you have placed in the GroupBox.

MANIPULATING TABLES

Tables are a powerful formatting tool for web pages. If you look carefully at a complex web page (for example, Yahoo's home page, or CNN.com) you will see that the page is composed by building multiple levels of tables nested within each other. These give the effect of columns within a column and rows within rows. Mastering nested tables and the various formatting options for tables will take you a long way towards creating the most sophisticated custom web pages.

To insert a table at the current cursor position or to format an existing table, click the Table icon on the top row of the toolbar. You will see the following popup window:

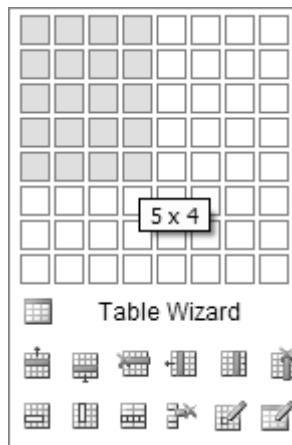


Figure 16.4 – Entering a table and specifying table options

To create a table, drag your mouse over the boxes at the top of the popup to specify the number of rows and columns you need. Release the mouse to see the table. (If you need more than 8 rows or 8 columns, create the table with the maximum number, then use the Insert row or Column function to insert additional rows or columns. You can also adjust rows and columns on the Table Properties screen.)

To highlight a table, click the border until you see selection boxes appear around the border. When you right click the mouse, the following popup menu appears:



Figure 16.5 – Right-clicking on a table

Select **Show/Hide Border** to specify whether the border lines for the table and the cell as a whole are displayed. Select **Table Properties** to display the Table Properties dialog (see below). Select **Delete Table** to remove the table.

Table Properties

When you select the **Table Properties** option, the following dialog appears:

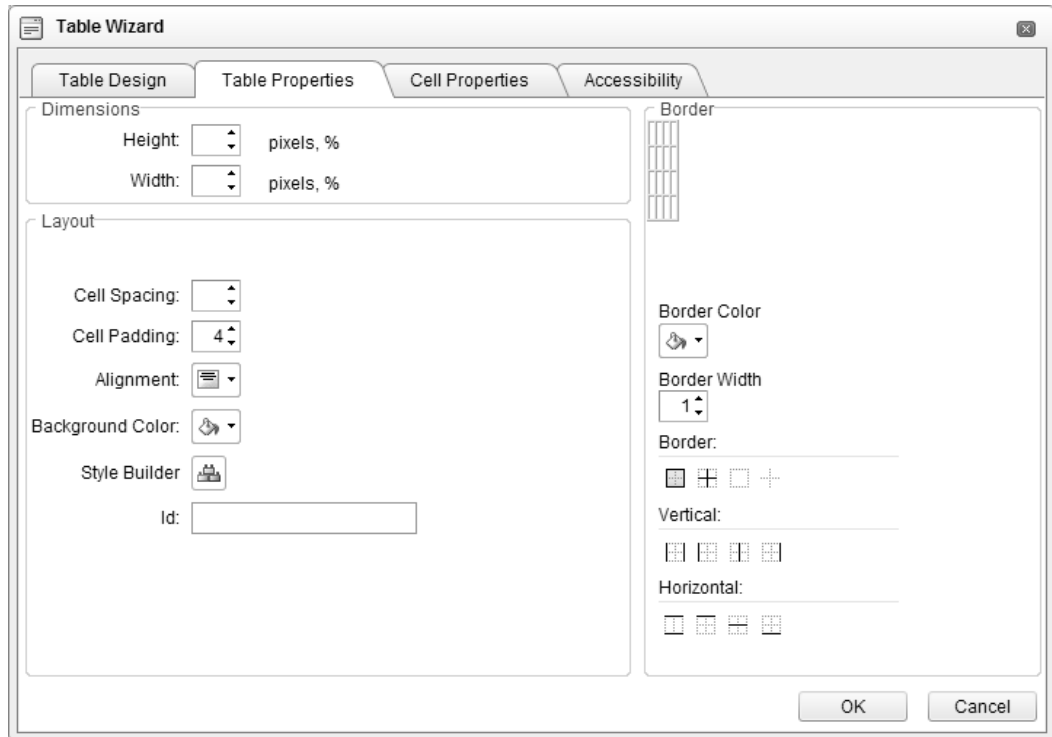


Figure 16.6 – Table Properties

In the Dimensions section, specify the overall dimensions of the table using pixels or as a percentage of the page size. (Note that these settings may be overwritten if the content in each cell forces the table to be wider or taller.)

In the Layout section, specify the cell spacing and padding (in pixels), default alignment, and background color.

- Cell Spacing is the number of pixels separating one cell from those on either side of it. It is the extra space inserted between the border lines of the cells. A cell spacing of 0 places the internal borders of adjacent cells on top of each other.
- Cell Padding is the number of pixels between the border of a cell and the text or images within that cell. Think of it as the internal margin on all four sides within the cell. A cell padding of 3 pixels often gives a pleasing look to your table.

You can also click the Style Builder button to create more complex style effects.

The Border section provides a graphic controller to specify which cells should have borders. Color and thickness can also be specified. If you specify a thickness of 0, the borders will not be shown. A common setting is Border=0, Cell

Padding=3 and Cell Spacing=0. This makes the table invisible but allows you to use it as a powerful alignment tool for text.

This dialog has some additional functions:

- Click the **Table Design** tab to modify the number of rows and columns in the table graphically.
- Click the **Cell Properties** tab to modify the properties of individual cells graphically. More information about cell properties is below.
- Click the **Accessibility Options** tab to specify options that will make your table accessible to people with disabilities using your website.

Click **OK** to save your changes or **Cancel** to discard them. Both buttons close the window and return you to the page editor.

Cell Properties

When the cursor is positioned inside a table and you right click the mouse, you will see a popup screen with the following options, which match the options on the popup above.

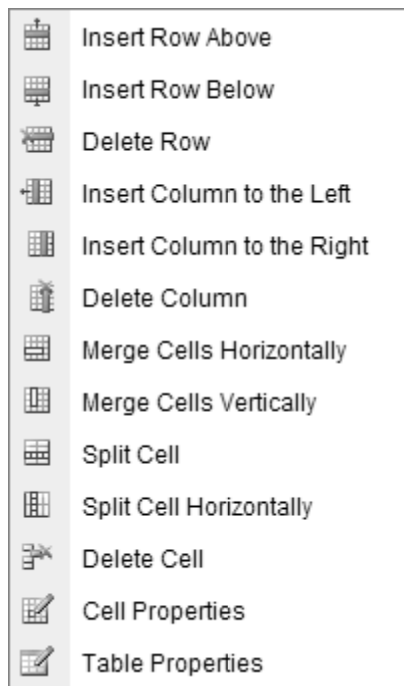















Figure 16.7 – Right-clicking in a table

Here is an explanation of the various functions:

	Insert a row above the current row
	Insert a row below the current row
	Delete the current row
	Insert a column to the left of the current column
	Insert a column to the right of the current column
	Delete the current column
	Merge cells horizontally
	Merge cells vertically
	Split previously merged cells vertically
	Split previously merged cells horizontally
	Delete the current cell
	Display the cell properties dialog
	Display the table properties dialog

When you select the Cell Properties option, the following dialog is displayed:

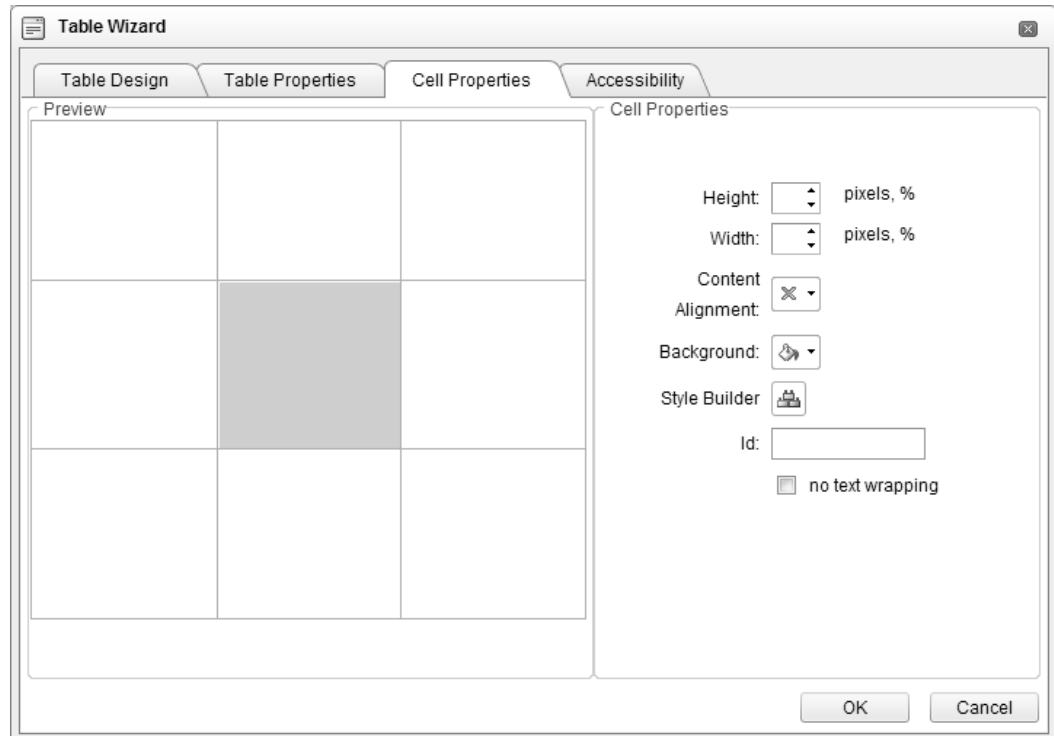


Figure 16.8 – Cell Properties

This dialog allows you to select a cell, then explicitly specify the height and width of the cell, in pixels or as a percentage of the table (not the overall page width.) Note again that these settings may be ignored if the contents of the cell (especially an image) are too big to fit within the prescribed size.

Select the Content Alignment option to control how text is aligned within the cell. Select Background to change the background color of the cell. Select the Style Builder option to display another dialog that provides control over the complete set of style options within the cell.

The No Text Wrapping property tells the system not to wrap text within a specified width but instead, to expand the cell dynamically to accommodate the text entered into it. Note that this setting is ignored if the text is wider than the page minus the width of other cells or text in the same row.

Click **OK** to save your changes or **Cancel** to discard them. Both buttons close the window and return you to the page editor.

HYPERLINKS

Clicking the **Insert Link** toolbar button displays the following popup window:

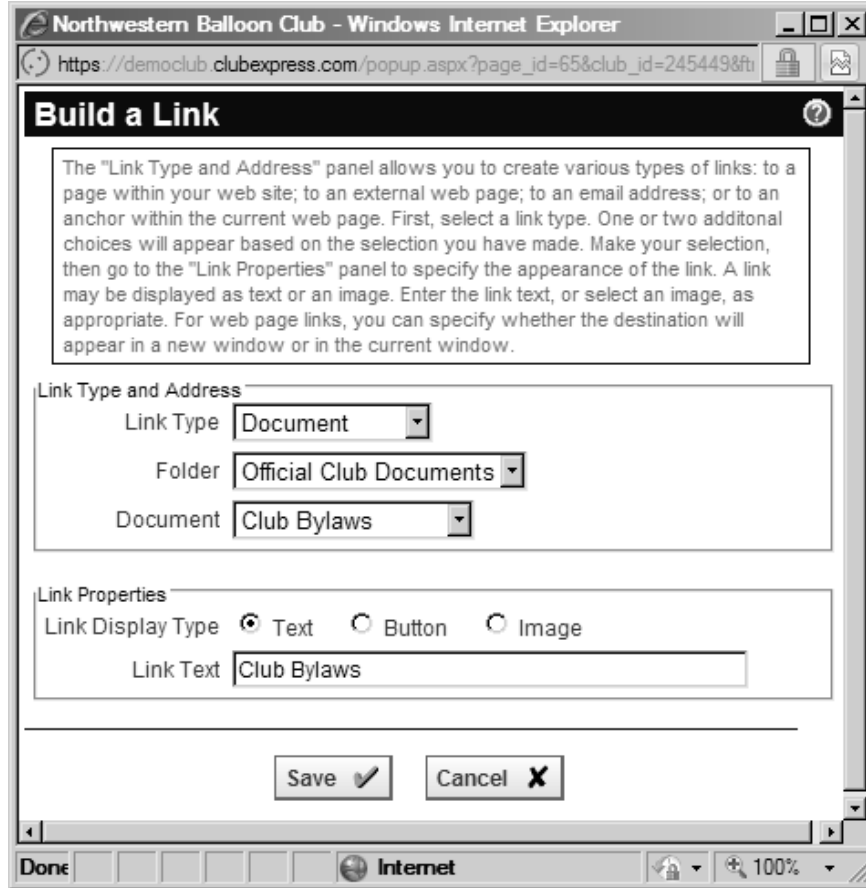


Figure 16.9 – Build a Link

The link builder supports ten types of links:

1. **Built-in Module** – This is a link to another module within ClubExpress. The next field is a drop-down list of active modules using the name you specified.
2. **Custom Page** – This is a link to a custom web page. The next field is a drop-down list of active custom web pages you have defined.
3. **Photo Page** – This is a link to a photo page. The next field is a drop-down list of categories; once you select a category you can select a page within that category.
4. **Future Event** – This is a link to an upcoming event defined in your calendar module. The next field is a drop-down list of categories; once you select a category, you can select an event within that category.

5. **Document** – This is a link to a document stored in your documents module. The next field is a drop-down list of folders; once you select a folder, you can select a document within that folder.
6. **Donation** – This is a link to a donation fund. The next field is a list of active funds.
7. **Survey** – This is a link to the opening page of an active survey. The next field is a list of available surveys.
8. **External Page** – This is a link to a web page stored on another website. The next field will prompt for the External URL, the address of the website you wish to go to.
9. **Email Address** – The next field will prompt for the Email Address.
10. **Anchor** – Select the “Anchor” option to place a named anchor at the cursor.
11. **Link to Anchor** – Select the “Link To Anchor” option to create a link to an anchor within the page (for example, from a mini-index at the top of the page down to a section heading, or from the end of a section back to the top of the page.)
12. **Blog** – This is a link to the main page of a specified blog, showing the most recent posting/entry together with links to previous postings/entries.

Links can be represented in three ways, using text, a ClubExpress-style button or an image. If you select **Text** or **Button**, the next field prompts for the text to be used. If you select **Image**, a button replaces the field; clicking this button displays the ClubExpress Select an Image window, described in the following section. (Note that the Button option will not work when you are composing emails using the editor because the button style does not accompany the email.)

You also have the option of having the target page appear in the same window (customary for another ClubExpress module, web page or photo page) or a new browser window (customary for linking to an external website.)

Click **Save** to save your changes or **Cancel** to discard them. Both buttons close the window and return you to the page editor.

External Links that do not support HTTPS

Under normal circumstances, ClubExpress manages the “http” and “https” text for you so that links work whether or not users are logged in. But sometimes, from the members-only side of the website, you will want to link to an external website that does not support SSL (usually popping up the site in a new window.) To do this, go into HTML mode, find the link and “src=” tag and include “nossl-“ in front of the actual link. For example:

```
src="nossl-http://www.myexternalsite.com/etc"
```

INSERT PHOTO

Clicking the **Insert Photo** toolbar button displays the following popup window:



Figure 16.10 – Insert Photo

Enter one or two tags and click the **Show Photos** button to display a list of photos with these tags. As you click on a photo, a preview is shown in the right panel. You can also *[Shift-Click]* and *[Ctrl-Click]* to select multiple photos at a time, but the preview panel will only show the first selected photo in the list. Photos can be inserted into your custom page in one of three ways:

- As a hypertext link. You have the option of specifying the text to use. When the link is clicked, a popup window will appear showing a larger version of the photo.
- As a thumbnail image (with the longest dimension set to 120 pixels). When the image is clicked, a popup window will appear showing a larger version of the photo.

- As an embedded image on the page (with the longest dimension set initially to 450 pixels.) You can adjust the size of the image using the handles provided.

Click **Select** to insert the image(s) as defined, or **Cancel** to close the dialog without inserting any images.

INSERT IMAGE

Clicking the **Insert Image** toolbar button displays the following popup window:



Figure 16.11 – Insert Image

From this window, you can select graphics files already uploaded (“Club Web Graphics”) or standard graphics within the current theme (“Theme Graphics”), or you can upload a new image.

Unlike photo libraries of club activities or member collectibles, these images represent graphics and photos which are part of your website or which represent official club images (such as logos, graphical tag lines, affiliate logos, awards, and other special images.)

To upload an image, click the **Browse...** button and navigate to the file on your local hard disk or network. Select the file, then click **Upload Image** to upload it into ClubExpress. It will appear in the **Image Files** list. Highlight the file name and it will appear in the Preview panel. If it's the right one, click **Select** to place it on your page.

Important Note: Only upload photos that you have the right to upload (i.e. you hold the copyright or the copyright holder has granted permission for the photo to be uploaded.) If you upload photos without permission of the copyright holder, you run the risk of being sued for unauthorized use of copyrighted material.

Editing Image Properties

To edit the properties of an image, click it so that selection handles appear. Then right click and select **Properties**. You will see the following dialog:

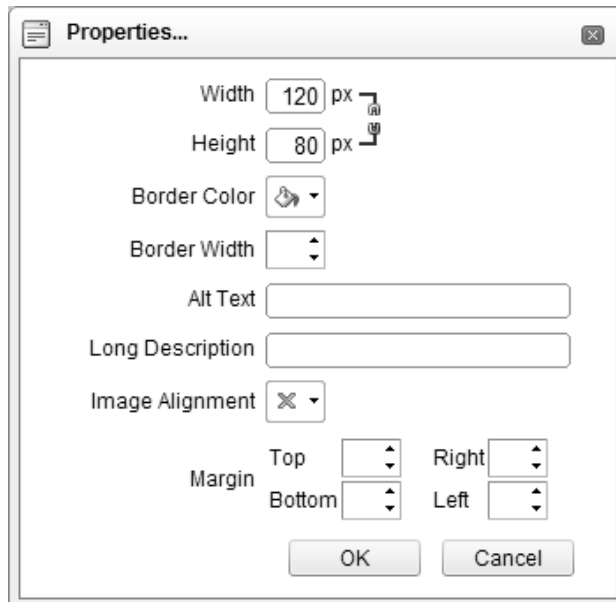


Figure 16.12 – Set Image Properties

From this window, you can perform the following functions:

- Specify the width and height of the image in pixels. The system does not maintain the relative dimensions of an image unless you first click the broken “chain” image to the left of the “Constrain” keyword.
- Specify a border color and width for the image in pixels. If this parameter is left blank, it defaults to zero.
- Specify alternative text for users who have images turned off in their browsers.

- Specify the alignment of the image. Some of the options in the list do not apply to an image sitting on its own line; instead, they control the positioning of the image when it's next to text.
- Control the horizontal and vertical spacing around the image, also specified in pixels.

INSERT AUDIO/VIDEO/FLASH

When you click the **Insert Audio/Video/Flash** icon, you will see a small drop-down menu. The first choice allows you to insert an audio, video, or Flash file uploaded to the website at the cursor position, while the second choice allows you to insert a link to a YouTube or Vimeo video which will then play within your website.

Uploading and Playing Media Files

Selecting the first choice displays the following dialog:



Figure 16.13 – Insert Audio, Video, Flash

Select the first radio button to upload a new file and store it in a folder within the Documents module. Select the destination folder and the file from your local hard disk. Click the second radio button to select a folder and a file from that folder that was previously uploaded.

The system will detect the file type and give you an error if a non-supported file was uploaded. For video and Flash files, specify the width and height for the panel; this information can often be found in the file properties window of the file on your local hard disk. For audio files, specify the width of the audio control panel only. You can also check the **Auto Play** box so that when the page is displayed, the sound or movie file will start playing automatically, instead of waiting for the user to click a Play button.

Click **Save** to place the media file on the page, or **Cancel** to return to page editing without placing the media file.

The following file formats are supported. However, please note that some browsers and platforms (PC, Mac and Linux) may require special add-ins to support certain file types. For example, Mac users will not be able to view Windows-based formats without a special QuickTime add-in.

- SWF (Flash movie)
- FLV (Flash video)
- WMV / WMA / AVI (Windows Media video/audio)
- MPG / M2V (older style MPEG video)
- QT / MOV (Quicktime movies)
- MP3 (Audio file standard)
- WAV (Windows sound file)
- AAC (Apple Audio Codec, used by iTunes)

Embedding a Linked YouTube or Vimeo File

Select the second radio button to display a simple text box into which you can paste code copied from YouTube or Vimeo (or any other website which supports embedded links and which allows you to copy a code block into your clipboard.)

In YouTube, look to the right of the video for the “Embed” box. You can also click the “Gear” icon beside the Embed box to display a panel with additional options, including whether or not a border should be displayed (and its color), and the video size.

In Vimeo, the `</>` Embed button appears when you move the mouse over the video panel itself. Click the button to display a popup dialog. Highlight the code block directly and use the computer’s Copy function.

Paste in the code block then click **Save** to save your change, or **Cancel** to close the dialog and return to the editor without saving.

SPELL CHECKING

Clicking the Spell Check toolbar button switches the editor into “Spell checking mode”:

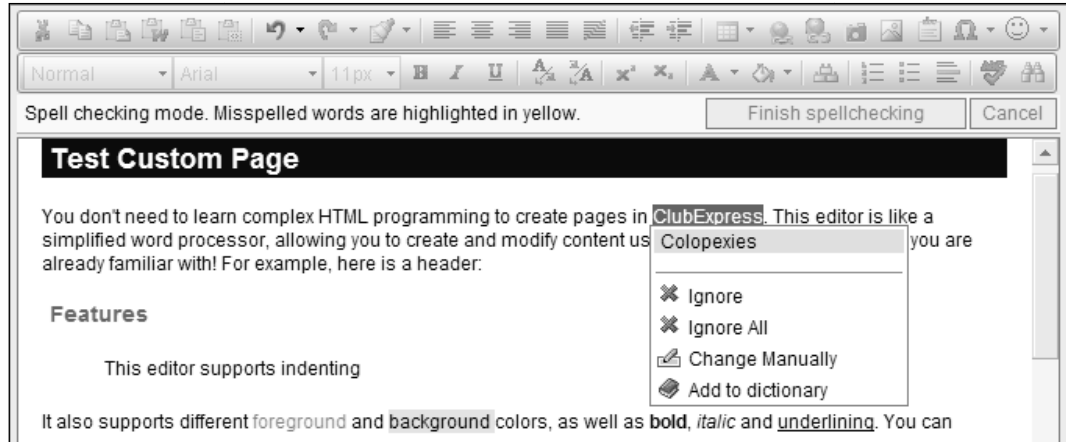


Figure 16.14 – Spell Check Dialog

Misspelled words are highlighted in yellow. There is a small popup menu below the first misspelled word, showing available options:

- Other words which might be what you intended to write;
- Ignore just this occurrence;
- Ignore all occurrences;
- Change manually. A small window will appear to edit the word.
- Add to dictionary, so that this spelling will be OK from now on.

Click the **Finish spellchecking** button to exit from spellchecking mode. Click the **Cancel** button to cancel your changes and exit spellchecking mode.

Chapter 17 – Home Page Designer

INTRODUCTION

The Home Page Designer allows an administrator to create and modify the organization’s home page. This is the screen that visitors see first when they go to your website; it’s also the screen that members generally see before and after they log in.

The home page can contain any combination of text, images and links to other pages. You can build many different layouts for your home page, including combinations of one, two and three columns. You can also have content that is visible to members only or to non-members only, and seasonal content that is only made visible at selected times but which is otherwise invisible.

UNDERSTANDING THE DESIGNER

When an administrator logs into the website, a special link appears at the top of the home page, as shown below:

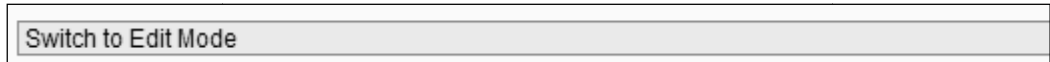


Figure 17.1 – Home Page for an administrator logged in.

Clicking on **Switch to Edit Mode** changes into the designer, which is shown below for a typical home page:



Figure 17.2 – Home Page Designer in Edit mode.

The home page designer works using horizontal rows. You can add rows at any time and also move rows up or down. To add a row above the current row, click the **Add Row**. The following popup window is displayed:

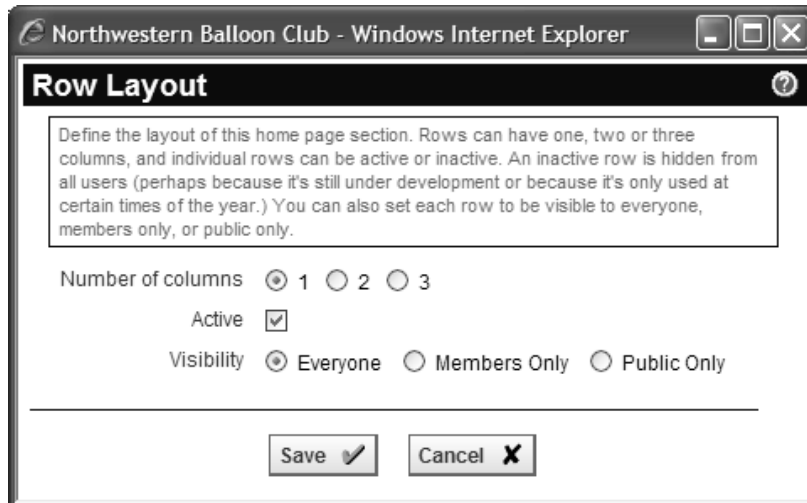


Figure 17.3 – Add Row – Row Layout

Each row can have one, two or three columns (cells), can be active or hidden and can be visible at all times or just to people who are logged in (members) or just to people who are not logged in. The **Active** option allows you to create a row over time and only make it visible once its finished, or to define a row that is only visible at certain times and is otherwise hidden (for example, before an annual conference.) Click **Save** and the new row is created.

The following figure shows a home page with multiple rows (each still empty), each with different numbers of columns.

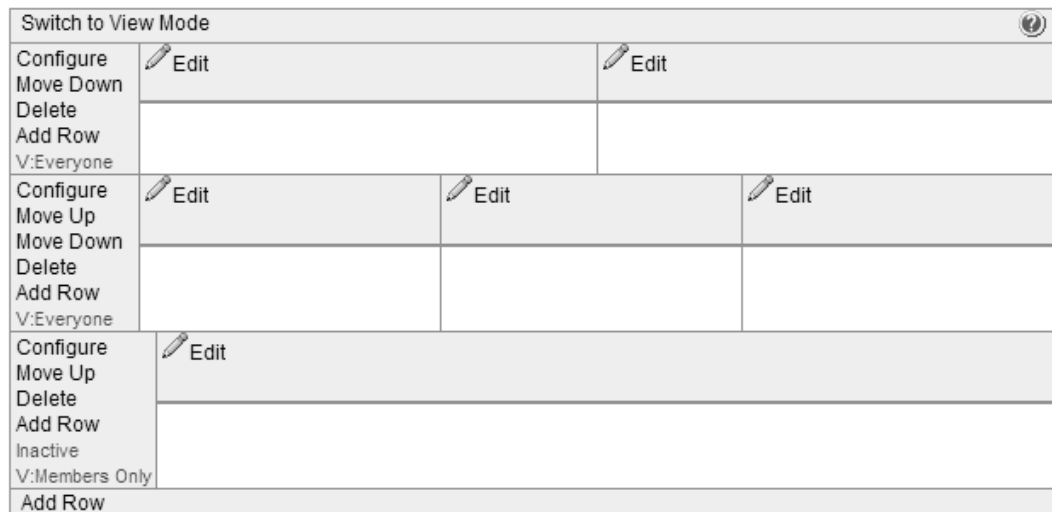


Figure 17.4 – Home page with multiple sections

The following options are available:

- Click **Configure** to change the layout or properties of a row. The same window as in Figure 17.3 is displayed. If you increase the number of columns in a row, the new ones are added on the right. If you decrease the number of columns in a row, they are removed from the right and their contents will be lost.
- Click **Edit** to edit the contents of a column. The content editor described in Chapter 16 is displayed. Use it to specify the text, images, colors, alignment, fonts and other elements of a typical page.
- For all rows except the first one, the **Move Up** link moves that row up one position.
- For all rows except the last one, the **Move Down** link moves that row down one position.
- Click **Delete** to remove the current row. You will be prompted to confirm this action.
- If the Active property for the current row is not checked, the text “Inactive” will appear in red. Click **Row Layout** to change this property.
- The red “V:xxxx” setting indicates *visibility*: who can see that row. Click **Row Layout** to change this property. Here are the possible values:
 - V:Everyone (doesn’t matter whether they are logged in or not)
 - V:Members Only (must be logged in to see this row)
 - V:Public Only (visible to people who are not logged in)
- Click **Add Row** to add a new row above the current row.

Note that administrators always see every row.

When you have finished editing the home page, or if you want to preview the page, click **Switch to View Mode**. You can toggle between modes as often as you need until the page has the look and feel you want.

Saving and Restoring a Previous Version of a Cell

When you edit the contents of a column, you have the option of saving your work and overwriting the current version or saving with a backup of the current version. We recommend using the backup option. If you made a mistake or want to restore the previous version, click the **Swap** icon that appears to the right of the **Edit** icon.. It will swap the current version and the previous one. Click the icon again to swap them back; this is a toggle between the current version and the most recent one.

Chapter 18 – Modules – Overview

INTRODUCTION

In the ClubExpress model, websites are built from a combination of built-in modules, custom web pages and photo pages (as well as the home page, and the built-in admin screens to manage a member's personal profile and the Control Panel.)

Individual modules can be enabled or disabled; if a module is enabled, it can be placed on the menu for all site users or for members only, or left off the menu and accessed via a link on another page.

Most modules have an administration function that is accessible in two ways:

- Via the **Admin** link in the Built-in Module Index screen, or the **Edit Content** link in the Custom Pages Index and Photo Pages Index screens, accessible to club administrators only.
- Via the red **Admin** link in the top-right corner of the module's main screen, accessible to club administrators and that module's coordinators only.

ENABLING A BUILT-IN MODULE

Use the following steps to enable a built-in module:

1. Login in as an Administrator
2. Select **Control Panel** from the menu
3. Select **Built-in Module Index**
4. In the grid, find the module and click **Configure**. You will see the following popup window.

Northwestern Balloon Club - Windows Internet Explorer

Module Configuration

ClubExpress provides a default name for each module but you can change each name to something more suitable for your club. You can also specify a different name for the text shown on the left menu; most clubs use a shorter version of the module name. Note that not every module needs to appear on the menus; some modules will only be accessible from other pages. Use the Visibility selection to control who can see this module, and the Active checkbox to turn the module on or off if you need to make major changes to it. Module coordinators can update the contents of modules for which they are enabled but cannot access these Club Admin menus.

Original Name Documents

Module Name

Menu Text

Visibility

Active

Figure 18.1 – Module Configuration

In this window, **Module Name** represents the name you want to use for the module within ClubExpress. **Menu Text** is the name to use on the menu, which is sometimes shorter. **Visibility** controls who can see this module: all visitors to the website, or members only after they have logged in. Some modules are more logical to place on the public side of a website, while others are generally made available only to members.

When a module is first enabled, it is also made Active. At any time, you can change its status to inactive by toggling the **Active** option. Inactive modules do not appear on menus.

Click **Save** or **Cancel** to close the window. You can also disable the module completely if you don't expect to be using it again.

ADDING A CUSTOM PAGE

Custom web pages are static pages that can contain any HTML content. The built-in advanced content editor is used to add text, graphics, images, tables, links and other page elements. Experienced web designers can also switch into raw HTML mode to add more complex effects.

Use the following steps to create a custom web page:

1. Log in as an Administrator
2. Select **Control Panel** from the menu
3. Select **Custom Page Index**
4. Click **Add Custom Page**.

You will see the same Module Configuration window shown in Figure 18.2 and explained above.

To create or edit the contents of a custom web page, click **Edit Content**. The advanced content editor will be displayed. For more information on editing the content of Custom web pages, see Chapter 16.

ADDING A PHOTO PAGE

Photo pages are special screens that display photos uploaded by members or admins. Each screen can have preamble text describing the contents of the screen, followed by photo thumbnails using one of nine predefined layouts. Clicking a thumbnail displays that photo in a larger size.

Use the following steps to create a photo page:

1. Log in as an Administrator
2. Select **Control Panel** from the menu
3. Select **Photo Pages**
4. Click “Photo Pages” beside an existing category or create a new category first.
5. Click **Add Photo Page**.

You will see the Photo Page Configuration window. For more information on Photo Pages, see Chapter 30 – Modules – Photo Pages

DISABLING A MODULE

If you wish to take a module *off-line* so that you can work on it, click **Configure** then uncheck the **Active** check box and click **Save**. The module is still enabled but will no longer be visible on menus.

If you no longer wish to include the module in your website, click **Configure**, then click the **Disable Module** button. The window will be closed and the module will no longer be enabled.

ADDING OR REMOVING A COORDINATOR

Each module can have one or more coordinators who have the right to modify the contents of that module only. When viewing the main screen of a module, coordinators see a red **Admin** link in the top right corner of the main content panel.

Click the **Coordinators** link on the Built-in Module Index screen to display the standard Module Coordinators window. To add a coordinator, click the **Add Coordinator** button and select the member. To remove a coordinator, click the **Remove** link by the coordinator's name.

Any active member can be a coordinator and that person will only have administrative access to that module.

MODULES AND SUBGROUPS



If your club or association has subgroups, the Committees, Documents, and Event Calendar modules are subgroup-enabled. Items defined by these modules (for example, a document category) can be linked to one subgroup only so that it's not visible to members of other subgroups.

For these three modules, you can also define module coordinators at a subgroup level. For example, a subgroup event calendar coordinator creates and manages just the events in the calendar belonging to that subgroup.

Chapter 19 – Modules – Benefits

INTRODUCTION

The Benefits module allows a club or association to describe the benefits of joining the organization. It is usually placed on the public side of the website, to encourage prospective members to join the organization.

A typical Benefits module screen is shown in Figure 19.1 below.

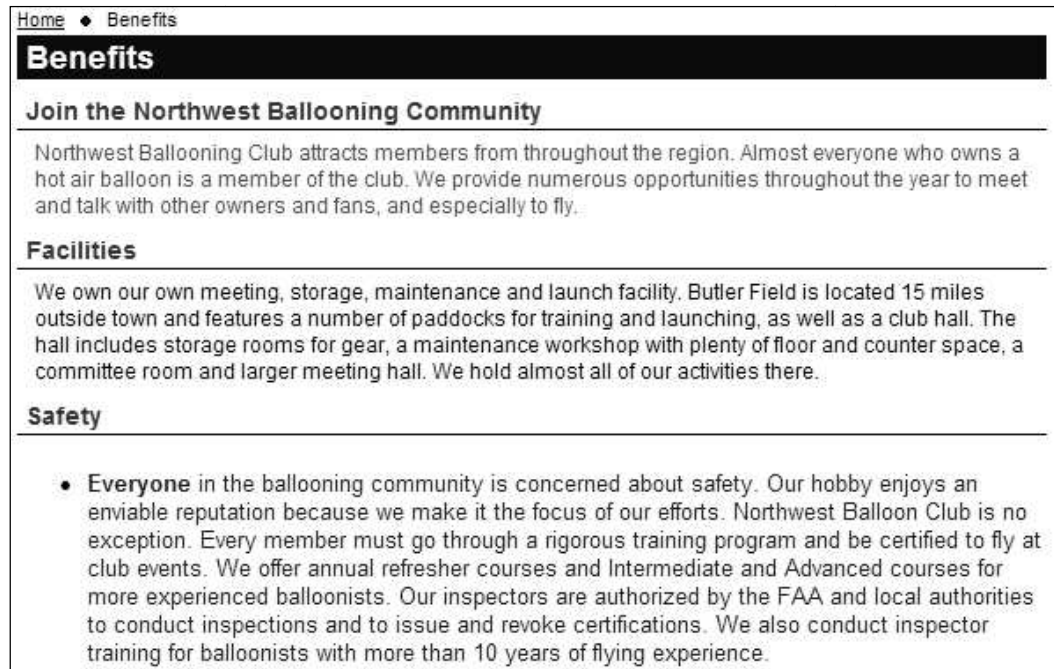


Figure 19.1 – Benefits Module

You have complete control over the heading, text and listing sequence of the benefits shown in this module. You can also optionally enable a "Sign Up Now" button at the bottom of the page, to link to the Member Signup Wizard.

BENEFITS ADMINISTRATION

There are two ways to edit Benefits:

1. Administrators only can click the **Admin** link beside the Benefits module in the Built-In Module Index screen.
2. When viewing the Benefits panel, coordinators and administrators can click the **Admin** link in the top right corner of the screen.

The following screen is displayed:

Home • Control Panel • Built-in Module Index • Benefits Administration

Benefits Administration

Use this module to list the benefits of membership in your club. Click "Add Benefit" to add a new benefit. Click "Edit" to change an existing benefit and description. Click "Delete" to remove a benefit. Click "Display Sequence" to change the order in which benefits are displayed.

[Add Benefit](#) [Display Sequence](#)

Benefit	Maintain
Join the Northwest Ballooning Community	Edit Delete
Facilities	Edit Delete
Safety	Edit Delete
Events	Edit Delete
Newsletter	Edit Delete
Networking	Edit Delete

[Return to Previous Page](#)

Figure 19.2 – Benefits Administration

This screen shows the list of existing benefit headings. To add a benefit, click **Add Benefit**. The following popup window is displayed:

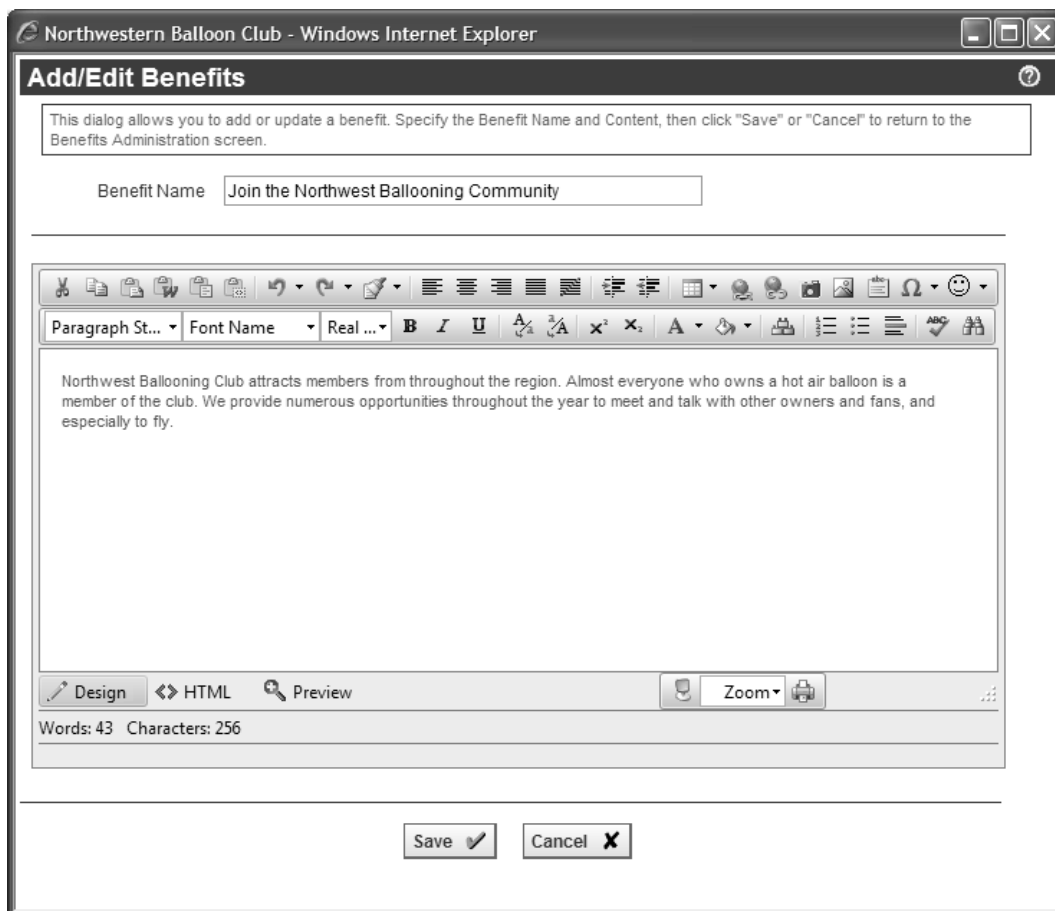


Figure 19.3 – Add/Edit Benefits

Specify the Benefit Name then use the advanced content editor to update the benefit. You can include images, links and any kind of advanced formatting. Click **Save** or **Cancel** to close the window.

To edit an existing benefit, click **Edit Benefit**. The same window is displayed.

To delete the benefit, click the **Delete** link. You are prompted to confirm this action.

Click **Display Sequence** to change the order in which benefits are displayed.

Enabling the Sign Up Now Button

Select **Control Panel – Website Options**. Change “Show member sign-up link in Benefits” to **Yes**, then specify the text to appear on the link button.

To disable the button, just go to the same screen and change the option to **No**.

Chapter 20 – Modules – Interests

INTRODUCTION

The Interests module allows a club or association to list and describe various special interests, programs or affiliations that the organization sponsors. Interests are grouped into categories that each group also defines. Members can then register for an interest, either from the Interest pages or from their individual Profile screens.

If the interests are based on things that members like to do, they provide a way for people with similar experiences and desires to meet up with each other and share experiences. If the interests are based on organization activities and programming they provide a ready group of participants and volunteers to ensure the success of an endeavor.

Where committees are *formal* sub-groups of members (see Chapter 21) think of interests as *informal* sub-groups of members that grow and shrink over time based on member preferences.

Interest categories can have one or more coordinators who are responsible for managing that interest and the underlying activities around that interest. You can also create a discussion forum around an interest and forum membership will be automatically maintained as interest members come and go.

When the Interests module is enabled and placed on the menu, members can sign themselves up for an interest and remove themselves from an interest by going to the Interests module and clicking the appropriate buttons. They can also click Profile – Interests to check or uncheck multiple interests at once. Finally, you can configure this profile page to be part of the Member Signup Wizard, so that new members must select their initial interests during the member signup process and update them during the membership renewal process.

Administrators can send emails to members of an interest group, both from the Interests module and from the Control Panel – Emailings option. And with the visibility options at the Interest Category level, you can use this module to create ad hoc mailing lists within your club or association that are visible to admins only.

When the Interests module is enabled, and a user clicks the menu choice, a screen like the following is displayed:

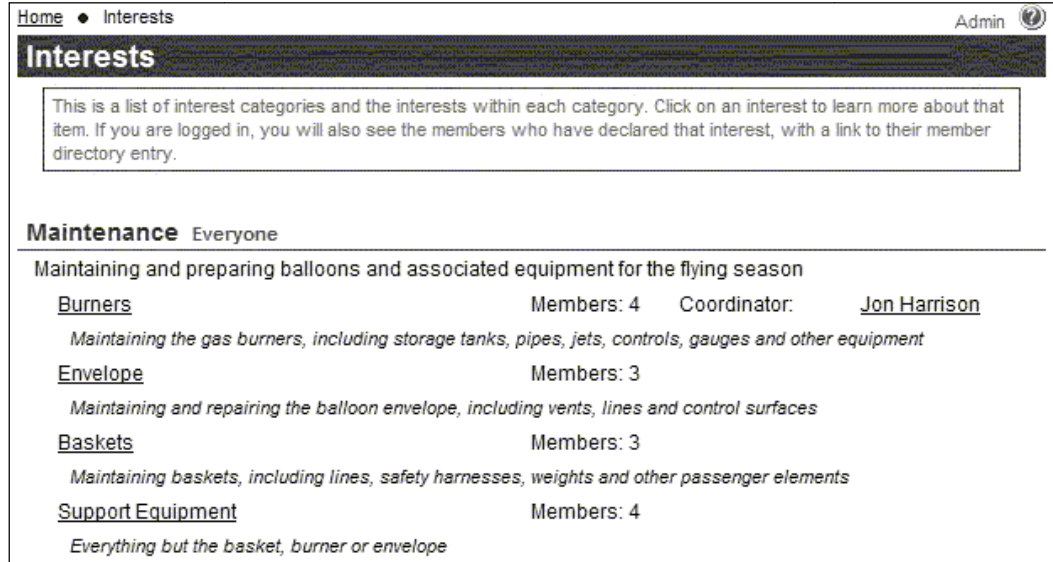


Figure 20.1 – Interests

This screen lists each interest category in the display sequence specified, with its description. Within each category are its interests, together with the Interest Coordinator and the number of members who have registered for that Interest.

Each interest on this screen is a link that will display the members who have registered for the interest. However, this list is available to members only. If the current user is logged in, the following screen will be displayed. If the current user is not logged in, the Login screen will first be displayed.

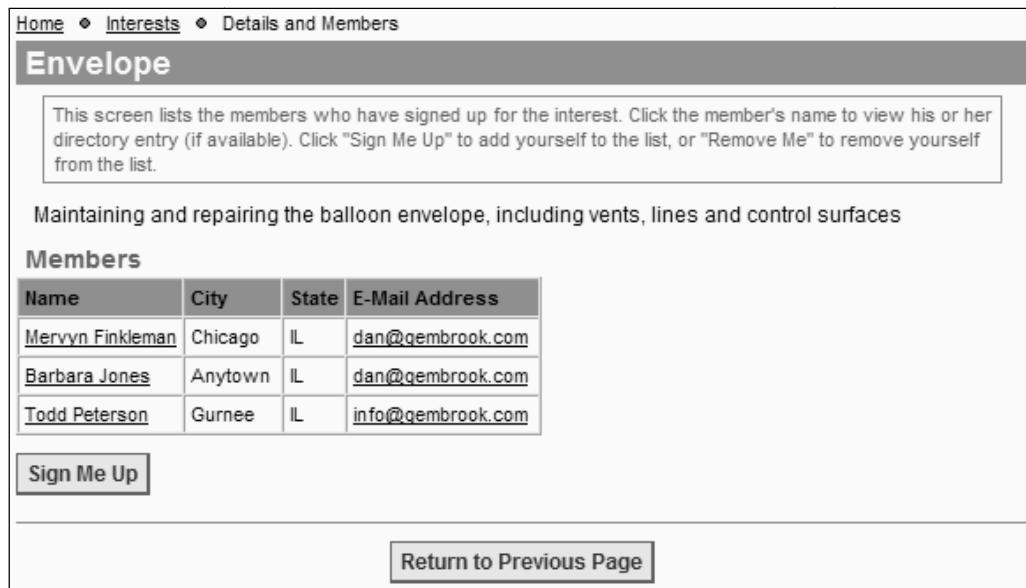


Figure 20.2 – Interest Members

This screen shows the members who have registered for the Interest. Each member is shown with his or her name, city, state and email address. The name is a link that will display that member's Directory entry.

If the current member is not on the list, the **Sign Me Up** button below the list allows that member to join the Interest list. If the current member is already on the list, the **Remove Me** button below the list allows the member to leave the Interest list. Note that the **Sign Me Up** button may not appear if your club or association has limited the number of interests you can join and you are already at the maximum.

Interests can be added, modified or deleted at any time. Some clubs and associations create interests around a specific program and then delete them when the program has finished.

INTERESTS CATEGORY ADMINISTRATION

There are two ways to edit Interests:

1. Administrators only can click the **Admin** link beside the Interests module in the Built-In Module Index screen.
2. When viewing the Interests panel, coordinators and administrators can click the **Admin** link in the top right corner of the screen.

The following screen is displayed:

Home • Interests • Interests Category Administration

Interests Category Administration

Interests are organized into categories which can be updated from this screen. Click "Add Category" to add a new category. Click "Edit" to change an existing category, its description and its coordinator. Click "Delete" to remove a category. Note that all interests assigned to that category will also be deleted. Click "Display Sequence" to change the order in which categories appear. Click "Interests" to view and edit the specific interests within a category.

Category	Interests	Visibility	Maintain
Maintenance	4	Everyone	Edit Interests Delete
Safety	1	Everyone	Edit Interests Delete
Ad Hoc Groups	1	Admins Only	Edit Interests Delete

Figure 20.3 – Interest Category Administration

This screen shows the Interest categories, into which individual interests will be organized, the number of interests in each category, and the category’s visibility. To add an Interest Category, click the **Add Category** button. You will see the following popup screen:

Figure 20.4 – Add/Edit Interest Category

Specify the Interest category name and a description (up to 200 chars.) You can optionally limit the number of interests that members may sign up for by checking the box and entering a number. The system will enforce this maximum within the category for each member (but not for admins) registering for interests.

The following visibility options are available:

- **Everyone** – this category is visible to visitors and members.
- **Members Only** – this category is visible to members only.
- **Admins Only** – this category is visible to club administrators only. Use this option to create ad hoc mailing and emailing lists.
- **Admins and Member Profile** – this category is visible to administrators only, as well as on the member's individual Profile screen. This option allows members to select an interest without showing this information to other members.

Click **Save** or **Cancel** to close the window.

To edit an existing Interest category, click the **Edit** link; the same window will be displayed. To delete an existing Interest category, as well as the specific interests grouped under that category, click the **Delete** link. You will be prompted to confirm this action. If you click **OK**, the interest will also be removed from the user profiles where it was listed.

Display Sequence

Click **Display Sequence** to change the order in which Interest categories are displayed. The standard display sequence window is displayed. Highlight a category and click the *Up* and *Down* arrows to change the display order. Click **Save** or **Cancel** to close the window.

Export Interest Members

Select this option to generate an export file of interest categories, interests and the members who have selected that interest.

INTERESTS ADMINISTRATION

To manage Interests within a category, click the **Interests** link. The following screen is displayed.

Home • Interests • Interests Category Administration • Interests Administration

Interests Administration

Use this screen to maintain interests assigned to a specific category. Click "Add Interest" to add a new interest. Click "Edit" to change an existing interest, its description and coordinator. Click "Delete" to remove an interest. Click "Display Sequence" to change the order in which the listed interests appear.

Category: Maintenance

[Add Interest](#) [Display Sequence](#)

Interest	Members	Maintain
Burners	12	Edit Members Email Delete
Envelope	11	Edit Members Email Delete
Baskets	10	Edit Members Email Delete
Support Equipment	10	Edit Members Email Delete

[Return to Previous Page](#)

Figure 20.5 – Interests within a Category

This screen behaves in a similar way to the previous one. Click **Add Interest** to add an Interest. You will see the following screen:

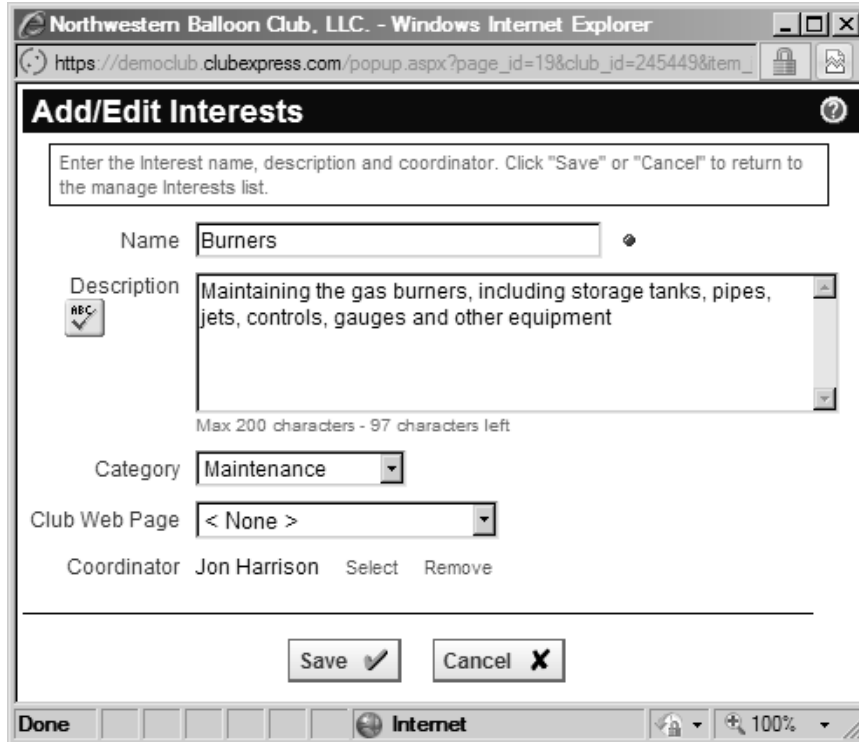


Figure 20.6 – Add/Edit Interests

When adding an interest, you can specify the Interest name, a detailed description (up to 200 chars), a web page and a coordinator. When editing an existing interest, you can also change the overriding category in which the interest appears.

Click the [Edit](#) link to modify an existing Interest. Click the [Delete](#) link to remove an Interest from the list. It will also be removed from the user profiles where it was listed. Click the **Display Sequence** button to change the order in which the Interests within a category are displayed.

Click the [Email](#) link to send a simple text email to everyone who is registered for this interest. This option is only available to administrators and coordinators of the Interests module.

Click [Members](#) to view a list of members who have declared that interest. You will see a screen similar to the following:

Home • [Interests](#) • [Category Administration](#) • [Interests Administration](#) • [Members Administration](#)

Interests Members Administration

This is the list of members who have registered for the current Interest. Click the "Add Member" button to add a member to the list and the "Remove" link to remove a member from the list. Members can also add and remove themselves from their Profile screens.

Burners

[Add Member](#)

Member	Status	Maintain
Michael Droz	Expired	Remove
Barbara C Jones	Active	Remove
Steven Kohl	Expired	Remove
michael e mccrory	Trial	Remove
Martin D Smith	Active	Remove

[Return to Previous Page](#)

Figure 20.7 – Interest Members

This screen shows the membership status for each member. When members expire or are dropped, they are not automatically removed from Interest groups (since they might renew or be reinstated.) In the public screens, only active members are shown, but in these admin screens, all members are visible, so it's important to see their status.

Click the [Remove](#) link to remove a member from the list. Click **Add Member** to display the member selector to add a member to the list.

REGISTERING FOR AN INTEREST

Members register for an Interest by going to the Interests module and clicking the **Sign Me Up** button.

Members can also register for an Interest from their **Member Profile** module. A screen like the following is displayed:

Home • Member Profile • Interests

Interests

Select the interests in which you would like to participate.

Maintenance

Maintaining and preparing balloons and associated equipment for the flying season

Burners
Maintaining the gas burners, including storage tanks, pipes, jets, controls, gauges and other equipment

Envelope
Maintaining and repairing the balloon envelope, including vents, lines and control surfaces

Baskets
Maintaining baskets, including lines, safety harnesses, weights and other passenger elements

Support Equipment
Everything but the basket, burner or envelope

Competition

Sweep Rowing

Balloon races
We're interested in every aspect of balloon racing. We love to race and improve our skill at reading the weather, winds and terrain. We also foster competition with other clubs.

Figure 20.8 – Member Profile – Interests

This screen lists the categories and interests in the order specified, with a checkbox beside each interest. Members will check the interests for which they want to register. An **Uncheck All** link at the bottom of the page allows the member to clear the list and start over. Clicking **Save** or **Cancel** closes the screen and returns to the Member Profile screen.

The organization's membership director can also register a member for an Interest (or remove the member) from the version of the Profile screen displayed inside the **Member Manager**.

You can also configure the above screen to appear in the member signup and membership renewal wizards, allowing new members to declare their interests when they sign up and existing members to update their interests on renewal.

Chapter 21 – Modules – Committees

INTRODUCTION

The Committees module allows clubs and associations to track the various committees and other organized groups of members that are chartered to fulfill the group’s objectives. Committees include the Board of Directors and its sub-committees, as well as working groups built around events, publicity, the newsletter or website. Think of Committees as *formal* sub-groups within the club, whereas Interests are *informal* sub-groups (see Chapter 20).

In the discussion forums module, you can easily create a forum around a committee and forum membership will be automatically maintained based on committee membership.

In the ClubExpress model, committees can be created or deleted at any time. Committees can be “open” where any organization member can be a member of the committee and duration is not tracked; or “closed”, where the membership is fixed and members have a term of office (such as with the Board of Directors.)

A typical Committees screen is shown in the figure below:

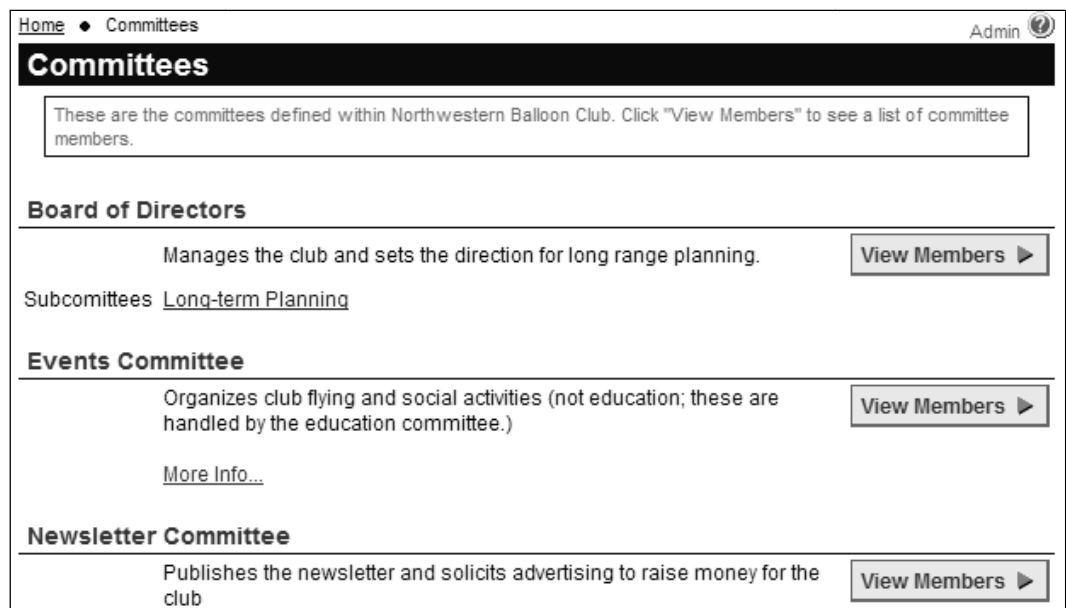


Figure 21.1 – Committees

Each committee is listed, with its description. If the committee has subcommittees, they are also listed with a link. You can also define a custom page to hold more information about a committee; click the **More Info...** link to jump to the page. Click the **View Members** button to see a list of members:

Home • Committees • Members

Board of Directors Members

This screen shows the members of the committee.

Board of Directors

Manages the club and sets the direction for long range planning.





	<u>Dan Ehrmann</u>	VP Safety
	Email:	
	Phone: 224-558-6348	
	<u>Linda C Jones</u>	Newsletter Editor
	Email: info@clubexpress.com	
	Phone: 847-255-0210	
	<u>Jessica Smith</u>	General Member
	Email:	
	Phone:	
	<u>Martin Smith</u>	Webmaster
	Email: info@clubexpress.com	
	Phone: 847-255-0210	

Figure 21.2 – Committee Members

The module can be configured to optionally show names and/or photos to everyone or just to members only. Email addresses and phone numbers are shown based on a member's visibility settings in Member Directory screen. If a committee uses terms of office, these will also be shown.

Click the **Send Email to Members** button to send an email to the committee members. This button is available to club administrators, coordinators of the committees' module and members of the committee. It is not available to members in general. You will see a popup dialog allowing you to define and send the email, which will include the committee name as part of the subject line, so that members know from whence it came.

Committees and Subgroups



If your club or association has subgroups defined, committees belong to a specific subgroup (or the top-level club.) The committees list is sorted to show the committees most directly relevant to members—at their local level—first, followed by committees at the each successive level and ending with the top-level club or association committees. (For example, in a larger club with multiple

levels and thousands of members, the national board of directors is going to be much less relevant than the steering committee for their local chapter.)

Subgroup administrators manage just the committees at their subgroup level(s). You can also define committee module coordinators at a specific subgroup level, allowing them to administer just the committee(s) at their level.

COMMITTEES ADMINISTRATION

There are two ways to manage committees

1. Administrators only can click the **Admin** link beside the Committees module in the Built-In Module Index screen.
2. When viewing the Committees panel, coordinators and administrators can click the **Admin** link in the top right corner of the screen.

The following screen is displayed:

Home • Committees • Committees Administration

Committees Administration

Use this module to list the various committees formed by the club to manage its operations. The Board of Directors should be one of these committees. Click "Add Committee" to create a new committee. Click "Edit" to change the properties of a committee and "Delete" to remove a committee. (You cannot remove a committee while there are members assigned to it.) Click "Members" to view, add or remove members.

Filter Committee List
Show Committees For: All Committees

Add Committee Display Sequence Reports

Name	Members	Parent Committee	Maintain
Long-term Planning	0	Board of Directors	Edit Members Delete
Board of Directors	6		Edit Members Delete
Events Committee	2		Edit Members Delete
Newsletter Committee	3		Edit Members Delete
Chase Committee	5		Edit Members Delete
Safety Committee	10		Edit Members Delete

Return to Previous Page

Figure 21.3 – Committees Administration



If your club or association has subgroups, you may need to select a level before any committees are shown.

The grid lists each committee defined, together with the number of members assigned to that committee. For subcommittees, the parent committee is also shown. Click the **Add Committee** button to create a new committee. The following popup window is displayed:

Northwestern Balloon Club, LLC. - Windows Internet Explorer
 https://democlub.clubexpress.com/popup.aspx?page_id=45&club_id=245449&item_id=25

Add/Edit Committee

This dialog allows you to add or update a committee. Specify the committee's name and purpose. Open Membership controls who can join the committee. For a closed committee, you should also specify the number of authorized members. (For example, your Board of Directors may have a specific number of members authorized in your bylaws.) Track dates is used to track when committee memberships start and expire; committees with open membership don't usually track dates.

Name: Board of Directors

Org. Level: Northwestern Balloon Club, LLC.

Purpose: Manages the club and sets the direction for long range planning.
 Max 2000 characters - 1936 characters left

Custom Page: < No Custom Page >

SubCommittee of: < No Parent Committee >
 (1 subcommittee)

Show Member List: Members Only

Show Member Photos: Members Only

Limited Membership
 Member Count: 6
 (Current Member Count: 5)

Track Dates (Terms of Office)

Save [✓] Cancel [X]

Done Internet 100%

Figure 21.4 – Add/Edit Committee

This dialog prompts for the name of the committee and a description of its purpose (up to 2000 chars.) You can select an existing custom page to show more information on each committee. Committees can have subcommittees (only one level is supported.) When you define a subcommittee, you can specify the parent committee. You can also control who can see the list of committee members and their photos (no-one, members-only, or everyone.)

The **Limited Membership** checkbox is used for committees that have a defined number of members, such as a Board of Directors. When you check this box an input field will appear allowing you to enter the number of members in the committee. The **Track Dates** checkbox is used when you need to track terms of office for a committee. Click **Save** or **Cancel** to close the window.



If your club or association has subgroups, you can assign each committee to a specific level. For example, a district or chapter might have a steering committee to manage the local operations of that district or chapter. This assignment cannot be changed once defined.

Back in the Committee Administration screen, click the **Edit** link to edit a committee name or purpose.

The **Delete** link is only present if the committee has no assigned members. You will be prompted to confirm the Delete operation. Note that if a document category in the Documents module is built around the committee just deleted, that document category will revert to being visible to admins only. Similarly, a forum based around a deleted committee will change to be “moderator defined”.

You can also click **Display Sequence** to control the order in which committees are displayed, and **Reports** to select and run an available committees report.

COMMITTEE MEMBERS

Click **Members** to update the members of the committee. You will see a screen similar to this one.

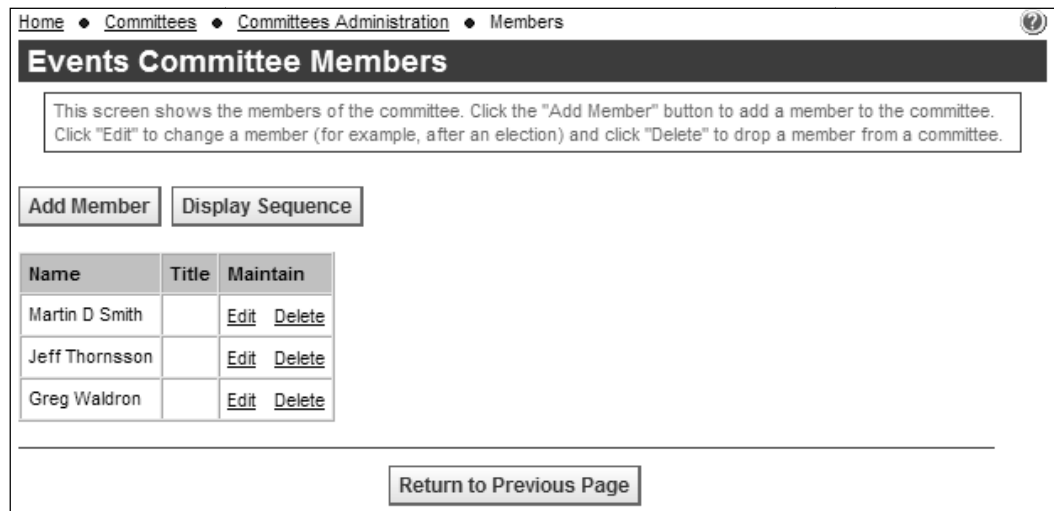


Figure 21.5 – Committee Members

This screen shows the assigned members of the committee. Titles are defined in a centralized list that is used for all titles within the club. See Chapter 10 for more information on defining titles. There are two versions of this screen.

- If a committee does not have a restricted member count, then you can freely add and remove members. Click the **Add Member** button to add a member, **Edit** to modify the information for a member and **Remove** to remove a member.
- On the other hand, if the committee has a restricted member count, then the grid will always show a number of rows equal to the count. Click the **Assign** link to assign a member to that “slot” and the **Remove** link to remove the member from that slot.

When you add or assign a member, the following popup window is displayed:



Figure 21.6 – Add/Edit Member

Click the **Select Member** link to display the standard member selector. Once you have selected a member, specify a title (see page 167 for information on defining Titles). If dates are being tracked, you will also specify the date the member joined the committee and the date that his or her term expires.

You can add a member to a committee without a title and a title to a committee without an assigned member (a vacant position). You can also click the **Add Title** button to add a title that is then immediately available to be used in the committee.

Click **Save** or **Cancel** to close the window.



If your club or association has subgroups, committee members are assigned from the members at or below the level at which the committee is defined. For example, a district committee may pull members from any chapter within the district.

Chapter 22 – Modules – News

INTRODUCTION

The News module is used for announcements and other information that should be communicated to members and visitors. News items can be entered with an active date (when the item will appear) and an expiration date (when the item will no longer be displayed.) Each item includes a heading, summary and detailed news release or report, which can include any HTML formatting and even images.

A typical news screen is shown below:

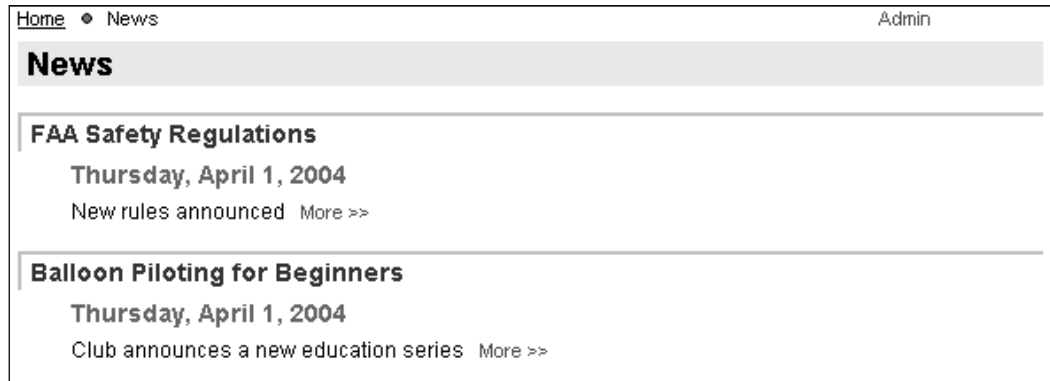


Figure 22.1 – News main screen

Each item is shown with a heading, the date of posting and a summary. Clicking the More>> link displays the complete news item, as shown in the following example:



Figure 22.2 – News item screen

Click **Return to Previous Page** to return to the main News screen.

NEWS ADMINISTRATION

There are two ways to manage news:

1. Administrators only can click the **Admin** link beside the News module in the Built-In Module Index screen.
2. When viewing the main News panel, coordinators and administrators can click the **Admin** link in the top right corner of the screen.

The following screen is displayed:

The screenshot shows the 'News Administration' interface. At the top, there is a breadcrumb trail: Home • Control Panel • Built-in Module Index • News Administration. Below this is a dark header with the word 'News' in white. A text box contains instructions: 'This screen lists active and expired news items. To add an item, click the "Add Item" button. To edit an existing item, click the "Edit" link. To delete an item, click the "Delete" link.' Below the text box are two buttons: 'Add Item' and 'Display Sequence'. The main content is divided into two sections: 'Current Items' and 'Expired Items'. Each section contains a table with columns: Active Date, Show Date?, Headline, Exp. Date, Visible To, and Maintain. The 'Current Items' table has three rows of data. The 'Expired Items' table has three rows of data.

Active Date	Show Date?	Headline	Exp. Date	Visible To	Maintain
7/23/2008	Yes	Ross Wins Again		Everyone	Edit Delete
8/2/2008	Yes	Adding news!		Everyone	Edit Delete
	Yes	Our Balloon wins National Event!		Everyone	Edit Delete

Active Date	Show Date?	Headline	Exp. Date	Visible To	Maintain
3/16/2006	Yes	Sparkling Cider deal	3/30/2006	Members Only	Edit Delete
2/20/2008	Yes	Balloons full of Hot Air	2/28/2008	Everyone	Edit Delete
3/21/2008	Yes	New Video	3/22/2008	Everyone	Edit Delete

Figure 22.3 – News Administration

This screen lists two grids, the first for current news items and the second for expired items.

- Click the **Add Item** button to create a new news item. See the section below for more information.
- Click the **Display Sequence** button to reorder the news items.
- Click the **Edit** link to edit an existing new item.
- Click the **Delete** link to remove a news item. You will be prompted to confirm the Delete operation.

- Expired items can also be edited and deleted. If a news announcement occurs on a periodic basis, you can edit a previously expired item to re-activate it.

ADD/EDIT NEWS ITEM

When you click the **Add Item** button to create a new item, or the **Edit** link to modify an existing news item, the following screen is displayed:

Northwestern Balloon Club - Windows Internet Explorer

Add/Edit News

For each news item, the Active date controls when the item will be displayed, and the Expiration date controls when it will automatically be removed. For the body of the news item, you can specify any text, including formatting, links to other pages, links to other web sites, photos and graphics. The Summary should be a short synopsis of the item which will be displayed on the main News web page. Click "Save" or "Cancel" to return to the Manage News Items screen.

Active Date: 7/15/2009 Expires: 10/15/2009 Show Active Date on News Story

Headline: Our Balloon wins National Event!

Summary: Yesterday, Ghost, the local balloon from our club, competed in the National Balloon Fly-in held in Amarillo, Texas.

Visible: To Everyone To Members Only

Full Text

Here is more text to test the full text display feature when the More link is clicked.

Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum...

Design HTML Preview Zoom

Words: 86 Characters: 524

Save Cancel

Figure 22.4 – Add/Edit News Item

For each news item, you can specify when the item should become visible; this feature allows you to pre-load an announcement before releasing it. You can also specify when the item should expire, after which time it will no longer be shown.

You can also specify whether the date should be shown. Some clubs and associations don't use the News module for press releases but instead for general announcements that are not necessarily time-sensitive.

Specify the News item headline and a summary. If the Summary field is left blank, the system displays the first 100 characters from the news item.

You also have control over visibility, whether the item should be shown to everyone or just to members. Even if the News module is on the public side of your website, a members-only item will not be shown.

The news item is specified using the advanced content editor, which is described in more detail in Chapter 16. This editor allows images, links, tables and other advanced elements to be included in your news releases.

Click **Save** or **Cancel** to close the window.

Chapter 23 – Modules – Documents

INTRODUCTION

The Documents module allows a club or association to store and organize documents that can be downloaded by visitors and members. Documents are organized into folders (categories) and can be specified with a title, description, author(s), creation and revision dates, size, format and other information. Folders can have “sub-“folders to any level. There are also options to allow members to upload documents and other members to rate and comment on them.

ClubExpress supports documents of any size; there is no restriction on the number and size of documents that can be stored in the system and made available for the legitimate purposes of the organization.

A typical document folder screen is shown below.

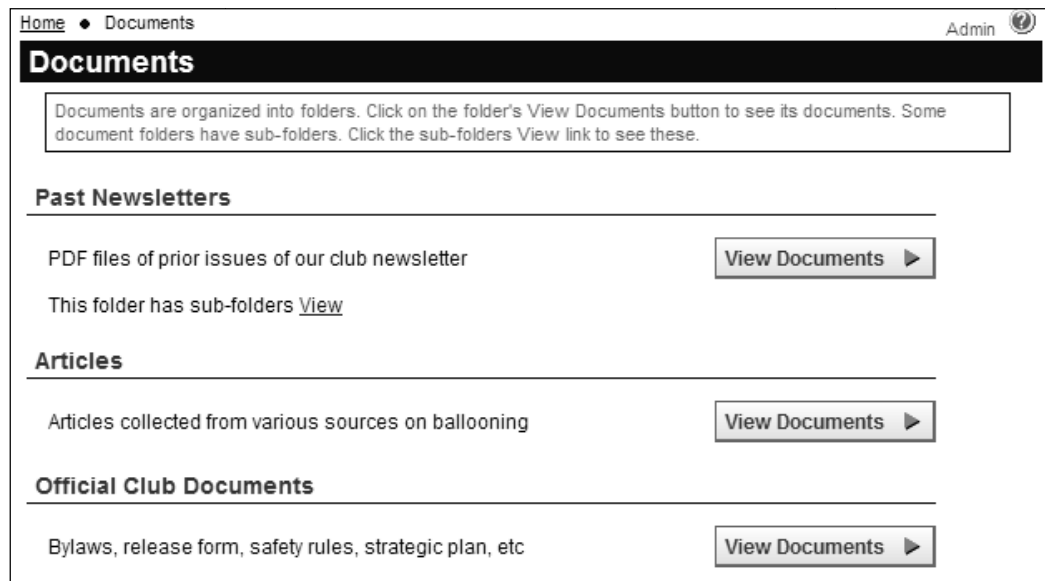


Figure 23.1 – Document Folders

If the current folder has sub-folders, click the [View](#) link to display a similar screen showing the sub-folder and its documents.

Clicking **View Documents** displays a screen similar to the one below.

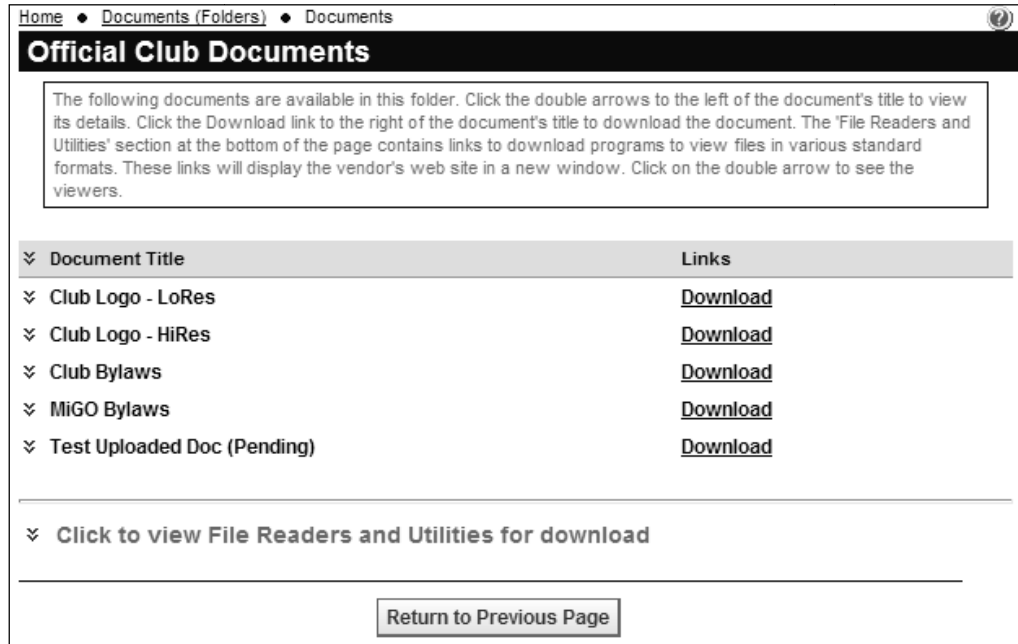


Figure 23.2a – Documents within a folder

To view the details of a document, click the double-down arrow to the left of the title. You will see a display similar to the following:

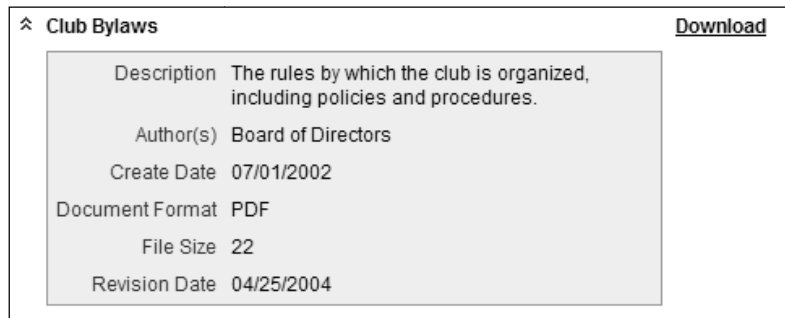


Figure 23.2b – Viewing document details

Click the double-up arrow to hide this display. To display links to popular file readers, click the double-down arrow near the bottom of the screen.



Figure 23.2c – Viewing file readers and utilities

If the document folder is visible to members of a committee only, and you are a member of the committee, you will see an **Add Document** button, allowing any committee member to upload documents. (See the section below for more info.)

UPLOADING, RATING AND COMMENTING ON DOCUMENTS

The documents module also supports advanced options that allow members to upload documents into a folder and allows other members to rate these documents and to comment on them. Each of these options can be separately enabled or disabled.

Document Uploading

If document uploading is enabled, members will see a special option near the top of the page:

Document Title	Links
Club Logo - LoRes	Download

Figure 23.3a – Upload documents option

Click the **Upload** button to see the following dialog:

Add/Edit Documents

This dialog allows you to add a document to your web site. Most fields should be self-explanatory. If you are editing an existing document, you can change its Folder. The Document Type is advisory, to tell users what type of document to expect. Click the "Browse" button to select the actual document from your local hard disk or network. Click "Save" or "Cancel" to return to the Manage Documents screen.

Title: Updated Flying Rules

Description: Provided by the FAA, these rules were updated in January, 2010

Author(s): Various

Create Date: [] Revision Date: []

Select Document: []

Max file size 16 MB

Figure 23.3b – Upload document dialog

Enter the requested information and specify a filename from your local hard disk. Click **Save** to upload the document or **Cancel** to close the dialog without uploading.

Documents are uploaded with a special *Pending* status. They are not visible until an administrator or module coordinator has approved them.

Rating Documents

If document rating is enabled, members will see a special option below the document information panel:



Figure 23.4 – Rating documents

The section on the left allows you to click on 1 through 5 stars to specify a rating. The section on the right shows the aggregate ratings to date, rounded to the nearest ½ star. The actual numerical rating is also shown (straight average.)

Commenting on Documents

If document comments are enabled, members will see a special option below the document information panel:



Figure 23.5 – Commenting on documents

Each comment is prefaced by the name of the member who made the comment and the date/time when the comment was posted. To add a comment, click the **Add Comment** link. You will see the following dialog:

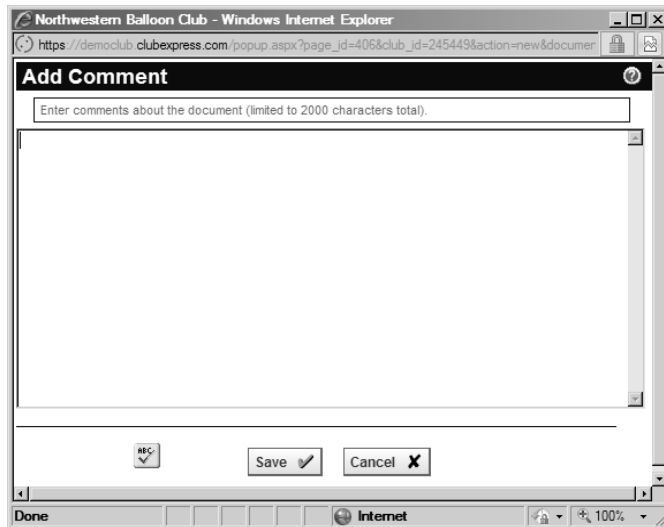


Figure 23.6 – Add a document comment

Enter the comment and click the **Save** button to add it to the list, or click **Cancel** to close the dialog without saving.

LINKING TO A DOCUMENT

It is trivial to link directly to a document from inside your ClubExpress website. Using the built-in Link Builder, select the Documents option, specify a folder and then select the document.

It is also possible, but a little trickier to link directly to a document from outside your ClubExpress website. To grab a link to the document, right click on the **Download** link in the screen above and select “Copy Shortcut” or the equivalent option in your browser. This will copy a complete URL path to the document into your clipboard. From there, it’s a simple matter to paste this link wherever you need it.

DOCUMENTS ADMINISTRATION

There are two ways to manage documents:

1. Administrators only can click the **Admin** link beside the Documents module in the Built-In Module Index screen.
2. When viewing the main Documents panel, coordinators and administrators can click the **Admin** link in the top right corner of the screen.

A screen similar to the following is displayed:



Figure 23.7 – Document Folders Administration

This screen displays a tree structure of folders and sub-folders. Click the [+] symbol to expand a folder or the [-] symbol to contract it. When you right click on a folder you will see a popup menu with some of the following options:

Select **Add Sub-folder** to create a new folder below the selected one. The Add/Edit Folder dialog is displayed (see below.)

Select **Edit** to edit properties for the current folder. (This option does not appear if you click the very first choice in the tree since it's just a placeholder.) The same Add/Edit Folder dialog is displayed.

Select **Display sequence** to modify the order of sub-folders below the selected one. This option only appears if the current folder has more than one sub-category. The standard ClubExpress display sequence dialog will be displayed, showing only the sub-folders immediately below the folder selected.

Select **Delete** to remove the current folder. This option only appears if the current folder has no documents and no sub-folders. You will be prompted to confirm this action.

Select **Documents** to view the list of documents within a folder. (See the main section below.)

Adding a Folder

When you select Add Sub-folder from the menu, you will see the following dialog:

The screenshot shows a web browser window titled "Northwestern Balloon Club, LLC. - Windows Internet Explorer". The address bar shows a URL: "https://democlub.clubexpress.com/popup.aspx?page_id=72&club_id=245449&item_id=12&action=".

The main content area is titled "Edit Folder" and contains the following elements:

- A text box for "Folder" containing "Official Club Documents".
- A text area for "Description" containing "Bylaws, release form, safety rules, strategic plan, etc". Below it, it says "Max 1000 characters - 939 characters left".
- A dropdown menu for "Sub-folder of:" set to "< No Parent Folder >".
- Four radio button options for visibility:
 - Visible to everyone.
 - Visible to members only.
 - Visible to admins only.
 - Visible to members of the following committee only.
- A dropdown menu for the committee, currently set to "Board of Directors".
- Three checked checkboxes:
 - Allow member uploads
 - Allow member ratings
 - Allow member comments
- Buttons for "Save" and "Cancel".

The browser's status bar at the bottom shows "Done" and "Internet" with a zoom level of 100%.

Figure 23.8 – Add/Edit Document Folder

Specify the folder name, a description (up to 1000 chars) and the parent folder. You can also specify visibility options for this folder:

- Visible to everyone.
- Visible to all members only.
- Visible to admins only. Use this option to create a document repository that is available to emails and other types of links, but which is not otherwise displayed in the user interface.
- Visible just to the members of a specified committee. Select the committee from the drop-down list.

There are three additional options that should be self-explanatory:

- Allow member uploads (uploaded documents still require approval);
- Allow member ratings
- Allow member comments

Click **Save** or **Cancel** to close the window and return to the previous screen.

To modify an existing folder, click the **Edit** link and the same popup window is displayed. Use the “Sub-folder of” option to rearrange the document tree by specifying a different parent folder.

MANAGING DOCUMENTS

To manage documents within a folder, right-click and select the **Documents** link. You will see a screen similar to the following:

Home • Documents • Documents Folder Administration • Documents Administration

Official Club Documents

These are the documents within this folder. Click the "Add Document" button to add a new document to the list. Click the "Edit" link to edit an existing document, including moving it to another folder and changing its visibility. Click the "Delete" link to remove an existing document. Click "Return to Previous Page" to return to the previous screen.

[Add Document](#) [Display Sequence](#)

Title	Create Date	Visibility	Rating	Downloads			Format	Maintain		
				#	Since	Reset		Edit	Delete	Comments
Club Logo - LoRes	12/03/2002	Public	N/A Reset	30	07/02/2008	Reset	JPEG Image	Edit	Delete	Comments
Club Logo - HiRes	12/01/2002	Public	N/A Reset	0	07/02/2008	Reset	Unknown	Edit	Delete	Comments
Club Bylaws	07/01/2002	Member	4.00 Reset	90	07/02/2008	Reset	Acrobat (PDF)	Edit	Delete	Comments
MiGO Bylaws		Member	N/A Reset	8	07/02/2008	Reset	Acrobat (PDF)	Edit	Delete	Comments
Test Uploaded Doc	02/09/2010	Pending	N/A Reset	0	02/09/2010	Reset	Acrobat (PDF)	Edit	Delete	Comments

[Return to Previous Page](#)

Figure 23.9 – Documents within a folder

Documents are listed alphabetically by title, with the create date and format and visibility. If Ratings are enabled, you can see and reset a document’s rating. You can also see how many times a specific document has been downloaded since the **Reset** link was last clicked. This counter tracks every download of the document, whether from this module, a link elsewhere on your website or on any other website, or links in emails that you send to members and non-members.

To add a document, click the **Add Document** button. To edit the information for an existing document, click the **Edit** link; the same popup window is displayed. To delete a document from the system, click the **Delete** link; you will be prompted to confirm this operation.

Click the **Display Sequence** link to change the order in which documents are displayed within a folder.

If member uploads are enabled, documents so uploaded will have a Visibility of “Pending”. Click the **Edit** link to change this and make the document visible to everyone, members only, or admins only.

Adding Documents

When you add a new document or edit an existing document, the following popup window is displayed:

The screenshot shows a web browser window titled "Northwestern Balloon Club, LLC. - Windows Internet Explorer". The address bar shows the URL "https://democlub.clubexpress.com/popup.aspx?page_id=83&club_id=245449&action=new&cat_id=...". The main content area is a form titled "Add/Edit Documents".

The form includes a text box for "Folder" containing "Official Club Documents", a "Title" text box with "Bylaws, 2010 rev", a "Description" text area with "Club bylaws, revised May, 2010. Changes to election procedures and board composition." and a character count "Max 500 characters - 415 characters left". There is a "Description" icon (HBC) to the left of the text area. Below the description is an "Author(s)" text box with "Board of Directors".

The "Create Date" is set to "5/10/2010" and the "Revision Date" is empty. The "Visibility" dropdown menu is set to "Members Only".

At the bottom of the form is a "Select Document" text box with a "Browse..." button and a note "Max file size 70 MB".

At the very bottom of the form are "Save" and "Cancel" buttons.

Figure 23.10a – Add/Edit Documents

For each document, specify the information shown. The description can be up to 500 chars. Required fields are shown with a red dot. Although you are working

within a document folder, any folder can be specified; this feature allows you to move a document from one folder to another without re-uploading it. Document Format tells users whether a special viewer is required; it's purely advisory.

The Visibility field controls whether the document is visible to all site visitors, members only or just club administrators. Of course, whether a document is visible to everyone depends on whether the Documents module as a whole is available to non-members, and also whether the current folder is visible.

Click the **Browse...** button and specify a local filename. Click **Save** to close the window and return to the previous screen; the file is automatically retrieved from your hard disk or network and stored within ClubExpress. Or click **Cancel** to close without uploading a document.

The Edit version of this dialog is essentially the same, except for the ability to update or refresh the document on disk. If you click the **Update** checkbox, the page refreshes to show a new panel:

Filename *Club Bylaws.pdf* Update?

Select Document

Max file size 16 MB

Preserve Original File Name Use New File Name

Figure 23.10b – Update document

This option allows you to refresh a document already uploaded. Browse to the document on your local hard disk or network and select it. By default, the system preserves the original filename, even if the updated document has a new filename, overwriting the old version of the document. But you can also tell the system to use the new filename and the original document will be deleted.

Click **Save** to save your changes and return to the document list screen, or **Cancel** to return without saving.

Chapter 24 – Modules – Events Calendar & Registration

INTRODUCTION

The Events Module allows clubs and associations to maintain an online calendar, to inform members and the public of events and to allow them to register for these events. The module fully supports options such as:

- Single-activity or multiple-activity events;
- Notifications (calendar entries that are not full events);
- Event categories, including color coding;
- Multiple calendar views with filtering by category and metro area;
- Searching for events based on multiple criteria;
- A link to an external website for an event organized by another group;
- A link to custom pages for additional information on the event;
- A map link for the event location;
- A link to add the event to the personal calendar on your computer;
- Registration required or recommended;
- Limiting events to members only;
- Registrant categories with color coding;
- Allowing companions to be signed up;
- Adding non-member registrants to the non-member database;
- Maximum capacity;
- Fees which change after a certain date;
- Fees which are different for non-members and/or companions;
- Payment by credit card or check;
- Registrant list with payment and cancel options;
- Send emails to event registrants;
- Event specific questions at multiple levels of the registration;
- Track attendance and whether an event is eligible for attendance credit;
- Event coordinators with control over email, phone and notifications;
- Event copy function, including recurring events;
- Multiple default locations;
- Optional event release agreement, including default;
- An extensive set of reports at the event and activity levels;
- Export registration data, including answers to event-specific questions;
- Write notes about events;
- A special printable version of the month grid with more details;
- Optionally display public holidays and other significant days;
- Archiving;

The system allows a coordinator to be specified for each event. An event report and photo page can also be entered by the coordinator and viewed by any user who has access to the event.

VIEWING EVENTS

When users open the events module, the first thing they generally see is the Month Grid view, shown below. (Clubs can configure a different default view on the event calendar admin screen.)

Home • Events Calendar Admin

Events Calendar - Grid View

The event calendar shows upcoming club events. Select a view then use the navigation buttons to move between dates. Click on the event to view more information, including the event description, times, location, fees and any rules regarding attendance; you can also register for events from this screen.

Aug		September 2007					Oct
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
28	27	28	29	30	31	1	
2 Winter Storage - Sign Up To Get On The Schedule	3 Winter Storage - Sign Up To Get On The Schedule	4 Test	5 Test	6	7	8	
9	10	11	12 Mid-Month Meeting	13 Mid-Month Meeting	14	15	

Figure 24.1 – Events – Month Grid View

This view shows a traditional month grid, with events shown on the day scheduled. Today is highlighted in a special color. Links allow users to scroll to the previous or next month.

Events are color-coded based on the event category. Click the **Legend** link to see a list of categories and the color associated with each. Click the red “X” to close this list.

Events that are flagged as **Members Only** will not be displayed when visitors are viewing the calendar. You can also flag events to show the title only to visitors, with details reserved for members.

The grid may also include **Notifications**, which are calendar entries with no details, but which may include a link to an external website. It may also include public holidays and other significant days such as Halloween, Mother’s Day, etc., if a special option is enabled.

The **View:** panel at the top of the screen appears in all views but its contents are different depending on the current view:



Figure 24.2 – View panel in Grid View



- Clicking the  icon displays a search/filter panel. See below for more information.
- Click **Switch to List View** to change view. See below.
- Click **Today** to jump the grid back to the current month.
- Click **Legend** to display a drop-down legend of the color-coding.



Figure 24.3 – View panel in List View

- Clicking the  icon displays a search/filter panel. See below for more information.
- Click **Switch to Grid View** to change view. See above.
- Click **Month** to see a list of events in the current month. Use the navigation buttons to move forward or backward by a year or month at a time.
- Click **Week** to see a list of events in the current week. Use the navigation buttons to move forward or backward by a week at a time.
- Click **Day** to see a list of today's events. Use the navigation buttons to move to the previous or next day.
- Click **Future** to see all events past today.
- Click **Today** to jump the grid back to the current month.
- Click **Legend** to display a drop-down legend of the color-coding.

Searching and Filtering

Clicking the  icon displays the following panel:

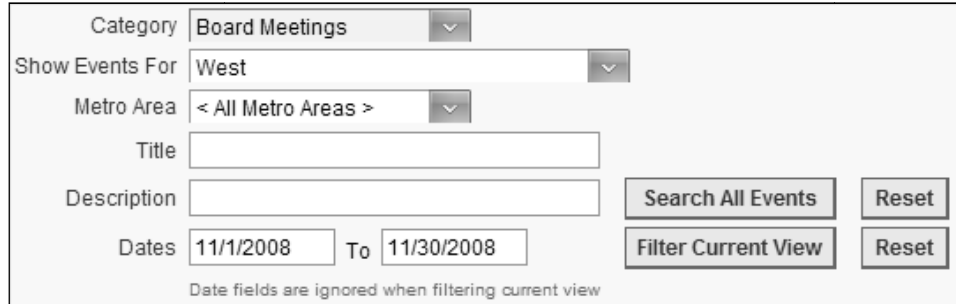


Figure 24.4 – Search / Filter panel for events

Using this panel, you can filter the current view to show only events that match your specified criteria. Select a category or metro area, or enter part of the title or event description. Click **Filter Current View** to retain the current view but only show events that match your criteria. Click the matching **Reset** button to clear your criteria. When you click **Filter Current View**, any values in the Dates fields are ignored because the view itself controls which dates are visible.


Using this panel, you can also search through all events to show events that match your specified criteria. When you click **Search All Events**, the system switches to a Search Results panel which is similar to a List View and which shows all events that match your specified criteria. Click the matching **Reset** button to clear your criteria.

When you search using the Title and Description fields, there is no need to type wildcards; the system will find the specified string wherever it appears.

The Metro Area option will only be displayed if you have defined metro areas (on the Control Panel.)



The **Show Events For** subgroup option will only be displayed if your club or association as subgroups (chapters, districts, regions). By default, the calendar shows members the events in their hierarchy (the chapter(s) they belong to, plus the districts and regions that these chapters belong to, plus the parent club.) But members can select a specific subgroup at any level to change this view (perhaps if they are traveling to a different part of the country.)

Click the  icon to hide this panel.

Advanced users can also preload search options. See page 384 for more information.

Event Details

To view the details for an event, click the event title in the current view. You will see a display similar to the following:

Home • [Events Calendar](#) • [Summer Picnic](#)

Events Calendar - Event View

This is the "Event Detail" view, showing all available information for this event. If the event has passed, click the "Event Report" button to read a report and view photos that were uploaded.

[Return to Grid View](#) [Today](#)

Summer Picnic

When: Saturday, Jun 30, 2007, 10:00 AM to 5:00 PM
 Where: County Forest Preserve
 543 Higgins Ave
 Schaumburg, IL

Contact: Lisa G Abrams
 Email leebie@verizon.net

Registration: Required
 Payment: Payment In Advance Only

Registrants & Fees:

Registrant	Fee
Companions Only	\$ 20.00
Member	\$ 10.00
Non-Member	\$ 10.00
Non-Members & Companions	\$ 10.00

Join us for a fun time in the sun and water. We'll have BBQ food, beer and soft drinks, games, swimming and lots of space to spread out and enjoy the season.

[Don't forget the sunscreen!](#)

Figure 24.5 – Events – Event View

This view shows the event title, location, description and rules (registration, attendance and fee, if any.) If the event is in the future and registration is required or recommended, the **Register Now** button allows users to begin the registration process.

If the **Mapquest** feature was enabled for the event, clicking the Mapquest icon opens a new window showing the event's location in Mapquest (where attendees can also get directions to the event location.)

Note that the **Register Now** button will not appear if registration is not required, or if the event is for members only and the current user is not logged in, or if the event is full or has passed (unless the current user is an admin), or if registration is closed for some other reason. For a multi-day, multi-activity event, the button will appear until the last day of the event, to allow people to register for individual activities on the last day.

If the **Registrants** button is displayed, you can click it to see a list of who else is coming. For members, you can then click their **Bio** link to jump to each member's Bio / Directory page.

vCalendar Icon



What is this?

The calendar icon below the Register Now button allows you to add the event to your personal calendar. This feature uses an Internet standard called a "vCalendar" file which is supported by most Personal Information Manager (PIM) programs, including Outlook, Eudora, Mozilla Thunderbird, Palm Desktop, Appleworks, Entourage, etc. When you click the icon, a standard dialog will be shown, asking if you want to Open or Save the file. Clicking Open creates a new appointment/meeting in your PIM calendar. You can also Save the file then share it with others. It can be opened at any time to create the appointment/meeting.

The vCalendar icon is also displayed beside each event in the various List views, allowing you to quickly add multiple events to your PIM calendar.

If the event has passed, the **Event Report** button displays a ClubExpress custom page with a report on what happened. You can also link a ClubExpress photo page to the **Event Photos** button.

Multi-Activity Events

If the event has multiple activities, these are listed below the general event description, as shown in the following screen:

Activities		
Registration		
When: Friday, Oct 21, 2005, 8:00 AM to 10:00 AM		
Where: Gunderson Ranch Flagstaff, AZ		
Registration: Required		
Registrants & Fees:	Registrant	Fee
	Companion	\$ 1,200.00
	Member	\$ 1,200.00
		Fee After 10/1/2005
		\$ 1,500.00
		\$ 1,500.00
BBQ and Dancing		
Details: Roasted calf and pig round out the day for tired and happy balloonists and their families. Join us for a fun filled evening with friends from around the country. Music provided by the Hi-Flyin Fiddlers, plus games for the kids.		
When: Saturday, Oct 22, 2005, 7:00 PM to 11:00 PM		
Where: Rear Lawn of the main house - Gunderson Ranch Flagstaff, AZ		
Registration: Required		
Registrants & Fees:	Registrant	Fee
	Companion	\$ 50.00
	Member	\$ 40.00
		Fee After 10/1/2005
		\$ 60.00
		\$ 50.00
Technical 1 - New techniques in Control		
Details: Reknowned international balloonist, Stephan Lundqvist will present a lecture on the new control architecture developed in Sweden, that's sweeping the community. After the session, his balloon will be available for review		

Figure 24.6 – Events – Event Activities

EVENT REGISTRATION

To register for an event, click the **Register Now** button. If the event is configured to handle registrations using a different website, a new window will open showing the configured site and page. If the event is configured to handle registration on ClubExpress, a page similar to the following will be shown:

(If you have already registered for this event, a warning message will be displayed, but the system will not stop you from registering again.)

Primary Registrant

The first section of this page varies according to the following rules:

If the event is open to non-members and the current user is not logged in, the following screen will be displayed.

The screenshot shows a web browser window with the following content:

- Navigation: Home • Events Calendar • Ballooning Fun • Registration
- Page Title: **Event Registration - Personal Information**
- Instructions: To begin the registration process, select one of the following options. If you are a club member, you must first log in before registering. If you are not a club member and the event is open to non-members, select this option and specify your name. Then proceed to the next step.
- Event Details:
 - Event: Ballooning Fun
 - When: Tuesday, April 08, 2008, 8:00 AM - 5:00 PM
 - Where: Jackson Farm, RR4, Newport, IL
 - Payment: Payment In Advance Or At Event
- Section Header: **Primary Registrant**
- Network Member? [Login to Register](#)
- Have you previously registered for an event or are you on our mailing list? [Click here to search](#)
- Select Registration Type: (dropdown menu)
- Instructions: In addition to your name, please enter your address, phone number and email address. This will allow us to contact you with additional information or if plans for this event change.
- Form Fields:
 - First Name:
 - Middle Initial:
 - Last Name:
 - Address Line 1:

Figure 24.7a – Event Registration Wizard – Non-Member

Members are invited to login. Non-members are asked if they have previously registered for an event. If not, they are prompted to enter their contact information. Some information may or may not be required.

Clicking the [Click here to search](#) link displays the following panel:

Have you previously registered for an event or are you on our mailing list? [Click here to search](#)

Enter the following

Email Address

Last Name

Figure 24.7b – Event Registration Wizard – Searching for a non-member

Enter an email address and last name then click the **Search** button. If a match is found, the contact fields are refreshed with the information from the database. Users can update this information and it will be saved. The event registration will be attached to the existing non-member record instead of a new one.

If the current user is a logged-in member, he or she will see the following screen:

Home • Events Calendar • Ballooning Fun • Registration

Event Registration - Personal Information

To begin the registration process, select one of the following options. If you are a club member, you must first log in before registering. If you are not a club member and the event is open to non-members, select this option and specify your name. Then proceed to the next step.

Event: Ballooning Fun
 When: Tuesday, April 08, 2008, 8:00 AM - 5:00 PM
 Where: Jackson Farm
 RR4
 Newport, IL
 Payment: Payment In Advance Or At Event

Primary Registrant

Select Registration Type

Figure 24.7c – Event Registration Wizard – Member

The system already knows who the member is. All he or she has to do is select a registrant type.

For single activity events that also allow members to bring companions, the member has the option of not attending him or herself but of signing up companions. This option is useful in various club types if the people being signed up belong to the member’s family or are associates at the member’s company.

If the current user is an event coordinator or a club administrator, he or she will see the following screen:

The screenshot shows a web browser window with the following content:

- Navigation bar: Home • Events Calendar • Ballooning Fun • Registration
- Section Header: **Event Registration - Personal Information**
- Instructional text: "To begin the registration process, select one of the following options. If you are a club member, you must first log in before registering. If you are not a club member and the event is open to non-members, select this option and specify your name. Then proceed to the next step."
- Event Details:
 - Event: Ballooning Fun
 - When: Tuesday, April 08, 2008, 8:00 AM - 5:00 PM
 - Where: Jackson Farm
RR4
Newport, IL
 - Payment: Payment In Advance Or At Event
- Section Header: **Primary Registrant**
- Radio buttons:
 - Sign up yourself
 - Sign up member
 - Sign up a non-member
- Registration Type: Select Registration Type

Figure 24.7d – Event Registration Wizard – Administrator

Three radio buttons allow admins to register themselves or another member or a non-member using the name and address panel. Administrators can register active and pending members only.

Each user must also specify a registrant type. This list will be dynamic based on the registrant types defined for the event and on whether the registrant is a member or not.

Companions

If the event allows companions to be signed up, a second section is displayed on the page, as shown on the figure below.

Companions/Guests

Add the names of the companions (if any) who will be attending the event with you by clicking the 'Add Companions/Guests' button. *Note: If nothing happens when you click the button, your popup blocker may be preventing the page from appearing. Click 'Edit' to change information for a specific companion; click "Remove" to remove a companion previously added.*

First Name [Edit](#) [Remove](#)

Last Name

Reg. Type

Title

Company

Address 1

Address 2

City

State

Zip

Country

Email

Phone

Figure 24.8a – Event Registration Wizard – Entering Companions

This section allows users to enter companions and to specify a registrant type for each of them. Selected fields may be required, depending on how the event is configured. Click the **Add Companion/Guest** button to display a popup screen for another companion, as shown on the next page.

Click the **Edit** link to modify a companion already entered or the **Remove** link to remove a companion previously entered, or to re-enter a companion if you made a mistake.

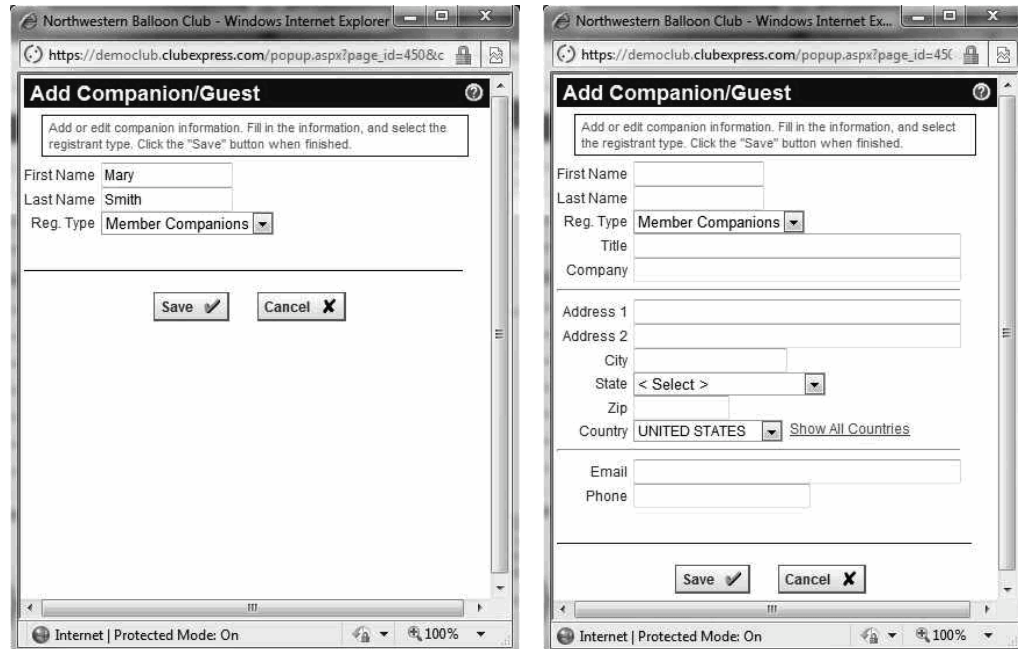


Figure 24.8b – Two versions of the Add Companion/Guest Dialog

Click the **Add Other Members in Membership** button to add the members of your family or company. You will see a screen similar to the following:

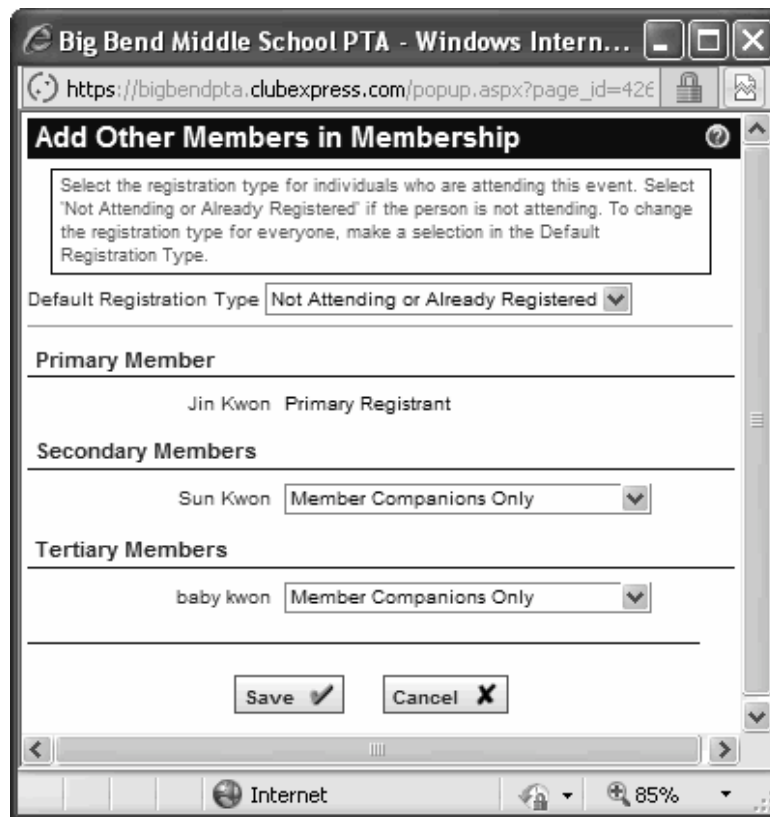


Figure 24.9 – Event Registration Wizard – Adding Additional Members

Select a default registration type and each secondary or tertiary member will be registered with this type. You can also change the type or “unregister” individual members by selecting the appropriate option. Click **Save** and these members are added en masse to the Companions panel, or click **Cancel** to close the form without adding anyone. When all information has been entered, click the **Next** button to move to the next screen.

What you see next will depend on whether the event as defined has just a single activity or multiple activities, whether a release agreement must also be signed and whether there are event-specific questions.

Single Activity Event – No Release Agreement – No Questions

For a single activity event with no release agreement and no event-specific questions, the summary page is immediately displayed. If the event has fees, the system knows how much should be paid based on the registrant and companion types already specified. And if there is no fee, the summary page will confirm this fact.

Home • Events • Around the World in a Balloon • Registration

Event Registration - Summary

Review the registration info shown below.

Event Information

Event: Around the World in a Balloon
 When: Wednesday, October 05, 2005, 10:00 AM - 2:00 PM
 Where: Kahn Auditorium
 123 Main St.
 Rolling Meadows, IL

Registrant Information

Primary Registrant: Martin Smith

Activity/Item Information

Activity/Item	Registrant/Fees
Around the World in a Balloon When: Saturday, Jun 5, 2004, 10:00 AM to 2:00 PM Where: Kahn Auditorium 123 Main St. Rolling Meadows, IL	Martin Smith \$ 15.00
Total: \$15.00	

Payment Information

You may pay for this registration in advance or at the door. Please make your selection below, and click the "Complete Registration" button to reserve your place. If you elect to pay in advance, you will see the payment page where you can pay with a credit card online, or print an invoice and pay with a check.

Pay in advance
 Pay at door

Figure 24.10 – Event Registration Wizard – Summary

At this point, users can still click the **Back** button to return to a previous step, or the **Cancel** button to cancel the registration process.

The system knows if payment is required in advance, or if payment must be made at the event, or if either option is allowed. In the above example, clicking **Complete Registration** will take users to the payment module to complete payment. Users will receive a confirmation email for the registration and another when the fee is paid. A registration is not saved until one of these buttons has been clicked.

Single Activity Event – Event-Specific Questions

If the event has event-specific questions, a page similar to the following is shown:

Home ♦ Events ♦ Test Multi-Activity Event ♦ Registration

Event Registration - Additional Information

Event: Test Multi-Activity Event
 When: Wednesday, May 10, 2006 - Thursday, May 11, 2006
 Where: Manny's Restaurant
 5005 Newport Drive
 Rolling Meadows, IL
 Payment: Payment In Advance Only

Registration Questions

Pace Group
 ▼

Questions for Barbara Smith

What is the highest level of certification you have achieved?
 ▼

In what year did you achieve this certification?

Questions for Martin Smith

What is the highest level of certification you have achieved?
 ▼

In what year did you achieve this certification?

Questions for T-Shirt

Martin Smith
 * What T-Shirt size do you want?
 ▼

Barbara Smith
 * What T-Shirt size do you want?
 ▼

Figure 24.11 – Event Registration Wizard – Event-Specific Questions

Questions can be defined at any of three levels:

- For the registration as a whole;
- For each registrant including companions with the registration;
- For each registrant signed up for a specific activity (this option is only shown for multi-activity events.)

Answers may be required in different formats, including text, number, date or date part, Yes/No or a selection list. Some answers may be required while others are optional. When you have answered the questions, click **Next** to proceed to the next screen.

Single Activity Event – Release Agreement

For a single activity event with a release agreement, this page is displayed before the summary page. Click the “**I agree**” checkbox to signify acceptance of the agreement and then click the **Next** button to display the summary page above.

If the event has both questions and a release agreement, the questions page will be displayed first, then the release agreement page.

Multiple Activity Events

After the initial registrant information page, the user is taken to a page similar to the following, which lists the individual activities for the event and allows separate registration for each activity.

Activities for Martin Smith	
Activity/Item	
NCATA Conference T-Shirt Registration: Required	<input checked="" type="checkbox"/> \$ 10.00
NCLB Update When: Monday, Oct 29, 2007, 12:00 AM to 1:00 PM Where: Same as event Registration: Required	<input checked="" type="checkbox"/> \$ 40.00
Lunch Details: lunch with guest speaker When: Monday, Oct 29, 2007, 12:00 PM to 1:00 PM Where: Same as event Registration: Required	<input type="checkbox"/> \$ 0.00
Registrant Total: \$50.00	
Registration Total: \$50.00	
<input type="button" value="◀ Back"/> <input type="button" value="Cancel X"/> <input type="button" value="Next ▶"/>	

Figure 24.12 – Event Registration Wizard – Event Activities

This wizard page will be displayed once for each person who is part of the registration, first the primary registrant and then each of his or her companions in turn. Only activities that each individual user or companion can sign up for will be shown on each iteration of the wizard page. Registration is a simple matter of checking the box to indicate that the current person will attend that activity or purchase that item. If an activity fills up while someone is registering their party, it will not be shown on subsequent iterations of this screen. Users can move forward or backward through the wizard to ensure that the most appropriate people in the party are signed up for each activity.

The event activities page keeps a running total of registered activities and fees. When users finish registering for individual activities, they click the **Next** button to proceed to the next page. If event-specific questions are defined, this screen will be displayed next. If a release agreement is required, this page is displayed next. If neither is required, the summary page shown above is immediately displayed.

Payment

For events with a fee, clicking the **Complete Registration** button displays a screen similar to the following.

Home • Control Panel • Pending Payments • Make Payment

Make Payment

The list below shows outstanding payments due. Use the checkboxes to select which payments you wish to make. Then, make a choice in the "Select Payment Method" dropdown list. If you elect to pay by credit card, enter the required information, and press the "Submit Payment" button. Please allow a minute or so for your transaction to complete.

If you prefer to pay by check, select the "Print Invoice and Send Check" option and press the button with the same name. A printable version of the page will be displayed which includes instructions on how to make out your check and where to mail it.

Fields marked ◆ require an entry. Click to change amount.

<input checked="" type="checkbox"/>	Event Registration (2/12/2007) <i>7/30/2007 - Season Opening Party</i>	Due \$ 15.00	Pay \$ 15.00
-------------------------------------	--	--------------	---------------------

<i>ray novak - Season Opening Party</i>	15.00
<i>Transaction Total:</i> 15.00	

Total Selected For Payment **\$ 15.00**

Select Payment Method < Select Payment Method >

Review the payments due, and select the items you wish to pay for now. Then, select a payment type and follow the instructions provided.

Refund Policy: The refund policy is set by Northwestern Balloon Club. Refund requests must be directed to Northwestern Balloon Club - they cannot be handled by ClubExpress.

Cancel **X**

Figure 24.13 – Pending Payments

This screen will show the final payment for the event, including the details of each line item (registrant, companion(s) and activities. If you have other pending payments, such as a membership renewal or registration for another event, these will also be listed and you can pay for them all with one transaction.

Select the payment type and enter any additional information that's required. For a credit card payment, this is your credit card information. For a check payment, a print function is available to generate an invoice for mailing with the check. Administrators have access to additional payment options (credit card outside ClubExpress, cash, complimentary, etc.)

The system maintains a Payment Status flag for event registrations. If users choose to pay by check, their registration is stored in the database but it's not confirmed until the check is received (and may be deleted by an event coordinator if there is a capacity limit and others are willing to pay immediately.)

Important Note: when non-members register for events and pay by credit card, an additional "Technology Convenience Fee" may be added to the transaction. This fee is charged by ClubExpress, not your club or association, and is retained by us. Clubs also have the option of hiding this fee and not showing it to non-members, although ClubExpress will still charge it. For more information, see page 361.

Partial Payments

Some events may be configured to allow partial payments. For example, a ski club may organize a multi-day trip to a distant ski resort, and members will have the option of making progress payments until the total has been paid.



If you see a pencil icon beside the event total and you wish to pay less than the full amount, click it. The amount to be paid will change to a text box allowing you to edit this amount. The system may suggest a recommended amount and it will enforce a minimum payment. Press *[Tab]* to move off the field and post your change; the total selected for payment will be updated.

EVENTS ADMINISTRATION

There are two ways to manage events:

1. Administrators only can click the **Admin** link beside the Events module in the Built-In Module Index screen.
2. When viewing the main Events panel, coordinators and administrators can click the red **Admin** link in the top right corner of the screen.

A screen similar to the following is displayed:

The screenshot shows the 'Events Calendar Manager' interface. At the top, there is a breadcrumb trail: Home • Events Calendar • Events Calendar Manager. Below this is a header 'Events Calendar Manager' and a help icon. A text box explains the screen's purpose: 'From this screen, you can coordinate every aspect of the scheduled events. The search panel allows you to find existing events to manage them; use the various options to limit the number of events shown in the list and click the Search button to update the list. For each event, the links allow you to manage the event description and options, to view registrations or event reports, or to copy, archive, or delete the event.' Another text box below explains the buttons: 'Use the buttons to the right of the search panel to configure event categories, standard registrant types and default information that you can use for each event. Click the New Event button to create a new event, which will step you through a mini-wizard to define the various parameters and options. Click the New Notification button to create a calendar entry which does not have a detailed description or registration option.'

The 'Search For Events' section includes radio buttons for 'Show All Dates' (selected) and 'Future Dates Only', 'Show All Types' (selected) and 'Events Only' / 'Notifications Only', and a checkbox for 'Include Archived Events'. Below are dropdown menus for 'Show Events For', 'Category' (set to '< All Categories >'), 'Metro Area' (set to '< All Metro Areas >'), and 'State' (set to '< All States >'). A 'Search' button with a lightning bolt icon is at the bottom right of this section.

To the right of the search panel are five buttons: 'Configure' (with a dropdown arrow), 'Event Reports', 'Event Export', 'Add Event', and 'Add Notification'.

The 'Search Results' section contains a table with the following data:

Start Date	Title	Category	Registrants	Level	Maintain
7/10/2009	Strategic Planning Meeting	Technical Sessions	4	Association	View/Edit Copy Archive
6/1/2009	Testride	Archived Events	0	Association	View/Edit Copy Archive/Delete
5/28/2009	Bicycle ride	Flying	0	Association	View/Edit Copy Archive/Delete

Figure 24.14 – Event Administration

The screen is initially displayed without search results. Click the Search button without entering a value to display all events. Or use the filter criteria to limit the display by the following options before clicking the **Search** button:

- All dates or future dates only;
- All event types or just events or just notifications;
- Include archived events (they are normally excluded);

- Event metro area (if defined);
- Event category;
- City and state.

You should make an effort to archive events when you no longer need them in the list, otherwise this list will get very long.

Matching events will be shown in the grid. Each event is listed with the event's start date, title, category, and the following maintenance links:

- **View/Edit** – a link to jump to the event detail view, with additional maintenance options for that specific event;
- **Copy** – to copy an event, including multi-copy;
- **Archive/Delete** – to archive or remove the event.

More details can be found below about each of these options.

Configure

Click the **Configure** button to see a drop-down list with various configuration options, each of which is described in more detail below:

- Event Categories
- Registrant Types
- Event Questions
- Locations
- Event Defaults

Event Reports

This option runs reports across multiple events. To see reports on a specific event, go to the Event View and click the Reports option on the administrator ribbon bar.

When you click the **Event Reports** button, you will see a standard ClubExpress report window. Select a report and click **Next**. You will next see the date selector screen to select a date range. Click **Next** for the output options screen.

Event Exports

This option exports general data on all events within a date range. When you click **Event Exports** you will see a screen to specify a start date and end date. Click the **Export** button generate a CSV file, or **Cancel** to close the window without exporting.

The **Add Event** and **Add Notification** options are discussed in detail below.

EVENT CATEGORIES

Select the **Configure – Event Categories** option to modify your organization’s event categories. You will see a screen similar to the following:

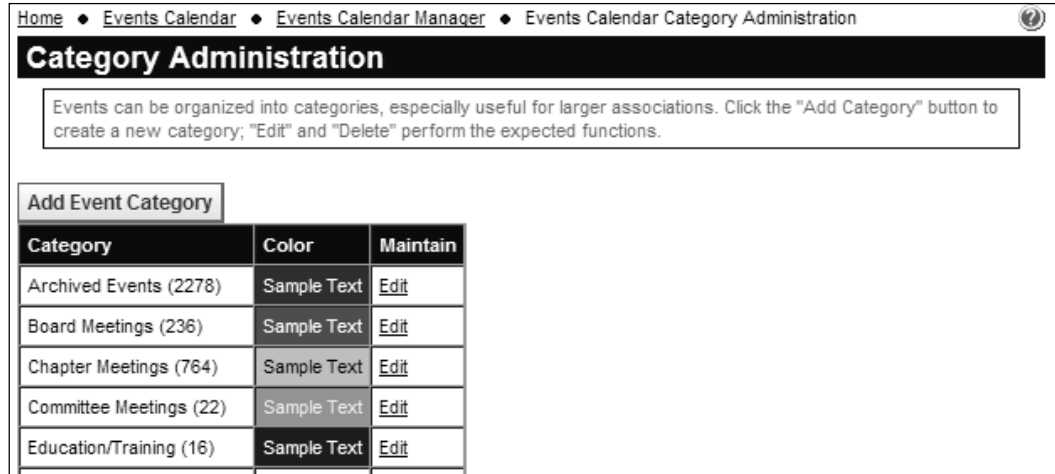


Figure 24.15 – Event Categories

Note that the ID numbers after each category can be used to pre-load a category in the search panel. See page 384 for more information.

To create a new category, click the **Add Event Category** button. A popup window similar to the following will be displayed:

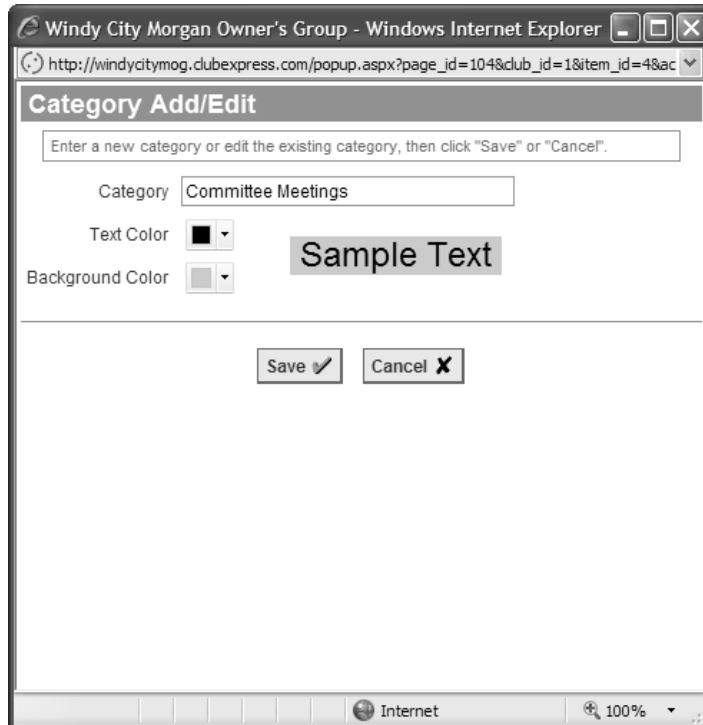


Figure 24.16 – Add/Edit Event Category

When you click the drop-down arrow beside one of the colors, a color selector panel will appear, allowing you to select one of 232 “web-safe” colors.

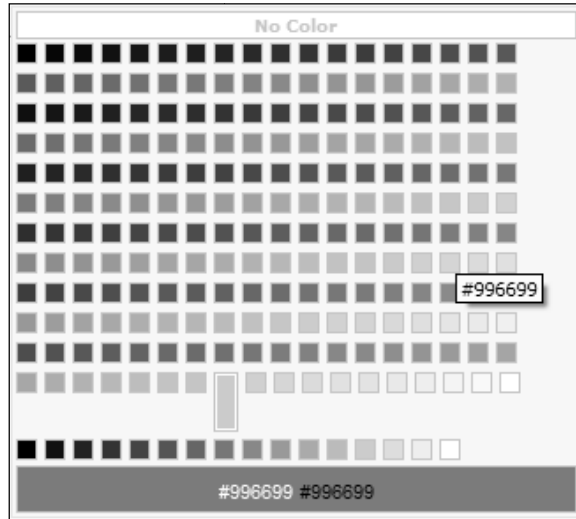


Figure 24.17 – Selecting a Color

Color-coding helps users visually distinguish events of a specific type in the calendar. The current color is highlighted with a larger rectangle. As you move your mouse over the different colors, the hex triplet of that color is shown as a ToolTip; the color is also shown across the bottom of the grid.

Click **Save** or **Cancel** to close the window and return to the category list.

To edit an existing category, click the **Edit** link. To remove an existing category, click the **Delete** link. You will be asked to confirm this action. You can only delete a category if it's not currently in use.

REGISTRANT TYPES

Select the **Configure – Registrant Types** option to define categories of registrants that you can then make available at the event and individual activity level. Registrant types are used to create different pricing levels for members, non-members, companions, seniors, active military, students, etc. A screen similar to the following will be displayed.

Home • Events Calendar • Events Calendar Manager • Registrant Type Administration

Registrant Type Administration

Use this screen to specify the different types of people who can register for association activities. Once you've configured this master list, you will be able to select which registrant types are valid for each event.

Add Registrant Type

Registrant Type	Usage	Hidden	Archived	Maintain
Companions Only	Member Companions Non-Member Companions	No	No	Edit Delete
Member	Member	No	No	Edit Delete
Member & Companions	Member Member Companions	No	No	Edit Delete
Non-Member	Non-Member	No	No	Edit Delete
Non-Members & Companions	Non-Member Non-Member Companions	No	No	Edit Delete
Students Ages 13 - 18	Member Companions Non-Member Companions	No	No	Edit Delete

[Return to Previous Page](#)

Figure 24.18 – Registrant Types

To create a new registrant type, click the **Add Registrant Type** button. You will see the following screen:

Figure 24.19 – Add Registrant Type

Event or activity fees are not specified here; these are just general types that you will later assign to (or leave off) individual events. Specify a title for the registrant type and one or more of the following usage options:

- Member
- Member Companion
- Non-Member
- Non-Member Companion

You can combine these registrant types in creative ways to control pricing for your events. For example

- If members and their guests pay one price but non-members and their guests pay a different price, create two Registrant Types, one for the member types and one for the non-member types.
- For a different group of events, you might want members to pay one fee and everyone else to pay a different fee. So you should have a Registrant type for members only and another for everyone but members.

- For some events, you will charge the same fee for everyone. So create an “Everyone” Registrant Type that you can use in these situations where every option is checked.
- Some clubs have special pricing for students or active servicemen, but only for selected events. So create a Registrant Type for this category of attendee, but then activate it only when needed for that event.

Use the **Hidden** option to specify a registrant type which should be available to administrators and event coordinators only; it is not available to non-members and members when they register for events.

Use the **Archive** option to archive registrant types that you no longer need, but which cannot be deleted because they were already used on events. Many clubs and associations find themselves changing how they think about registrant types as they get more familiar with them; this option allows clubs to hide their initial registrant types if they want to use a different set. (Be careful hiding registrant types that are used on active events; if you do so, people may not be able to register for these events. Be careful also copying an older event; if the registrant types previously used were archived, they will need to be changed before the event is activated.)

Click **Save** to save your entry and return to the list screen, or **Cancel** to return without saving.

To modify an existing registrant type, click the **Edit** link. To remove a type, click **Delete**; you will be prompted to confirm this action and this registrant type will no longer be available for events. You cannot delete a registrant type that is already being used in an event.

EVENT QUESTIONS

Use this option to define questions that can be asked of event registrants during the registration process. These screens are used to create the generic questions that can be used over and over again on individual events.

For example, if your club or association frequently holds lunches or dinners, perhaps with a guest speaker, you might define a question asking if people want chicken, fish or vegetarian. This question can then be applied to specific events as appropriate.

Selecting **Configure – Event Questions** displays the following screen:

Home • Events Calendar • Events Calendar Manager • Event Questions

Event Questions

Use this screen to define questions which are asked of members as part of the event registration process. Click Add Question to add a question, the Edit link to modify an existing question and the Delete link to remove a question. (Note that if you delete a question, all answers to that question are also deleted.)

[Add Question](#)

Question Name	Ans. Type	Required?	Maintain
Entree Choice	Select List	Yes	Edit Delete
Shirt Size	Select List	Yes	Edit Delete

[Return to Previous Page](#)

Figure 24.20 – Event Questions

This screen shows the questions already defined, including the question name, answer type, and whether an answer is required. To add a question, click the **Add Question** button. The following screen is displayed:

Northwestern Balloon Club - Windows Internet Explorer

Add/Edit Question

Question name is used for reference only and is not shown to the member. Questions can be answered in different ways, so the Answer Type drop-down list allows you to specify the most appropriate type for each question. Different types allow for different Values to be entered.

Question Name

Question

Maximum 250 characters.

Notes

Notes (if entered here) will appear under the question field

Answer Type

Values

Enter the items to be displayed in the list, separated by semi-colons.

Options

Required

Figure 24.21 – Add/Edit Question

For each question, specify a name or title for the question. You will use this to identify the question in the admin list and in reports, but it is never shown to the user. Then specify the question itself.

The Question Notes option allows you to specify an additional explanation that is displayed in smaller text under the question. This explanation helps users understand what information you are seeking and the format for their answer.

Answer Types

Different questions can be answered in different ways. ClubExpress supports a number of different formats for each question. As you change the answer type, a small prompt will appear under the Values field indicating what additional information you need to specify. (You may need to wait a few seconds for the screen to refresh.) The following formats are available:

Answer Type	Display Format	Values
Text	Text field	Enter a number from 1 to 100 representing the maximum text length allowed.
Long Text	Large text block	n/a. Note that embedded line breaks are retained in Long Text fields.
True/False	Radio button	Enter the “True” text, then a semi-colon, then the “False” text.
Date Year	Drop-down list showing 4-digit numbers.	Enter the lowest 4-digit year allowed, then a semi-colon, then highest 4-digit year allowed.
Date Month	Drop-down list showing the months of the year, spelled out.	n/a
Date Day	Drop-down list showing the numbers 1-31.	n/a
Date Full	Text field with a popup date-picker icon.	n/a
Integer	Text field	Enter the lowest integer allowed, then a semi-colon, then the highest integer allowed. Integers are whole numbers with no decimals.
Number	Text field	Enter the lowest number allowed, then a semi-colon, then the highest number allowed.
Select List	Drop-down list showing the choices in the order entered.	Enter the items to be displayed in the list, separated by semi-colons.

Required

Specify whether the event registrant must answer this question.

Click **Save** to save your question or **Cancel** to close the dialog without saving.

Maintain

Click the **Edit** option to edit an existing Club Question. The Add/Edit screen is displayed for the existing question.

Click **Delete** to remove a Club Question. All answers are also deleted.

LOCATIONS

Select the **Configure – Locations** option to define one or more default locations where you normally hold events. When you are defining events, you can select one of these locations to be used. The following screen is displayed.

Home • Events Calendar • Events Calendar Manager • Events Calendar Locations

Events Calendar Locations

Default Locations can be used as a quick way to enter location information on the 'More Info' page when building and event. Click "Add Location" to add a new location; click "Edit" to modify an existing location or "Delete" to permanently remove it.

Add Location

Location	City	State	Maintain
Manny's Restaurant		IL	Edit Delete

[Return to Previous Page](#)

Figure 24.22 - Locations

Click the **Add Location** button to add a new location. You will see the following screen:

Northwestern Balloon Club - Windows Internet Explorer

Add / Edit Events Calendar Location

Enter or edit the location. Then click "Save" or "Cancel".

Location: Springfield Conference Center

Address: 123 Main Street

City: Springfield

State/Province: Massachusetts

Zip/Postal Code: 01234

Country: UNITED STATES [Show All Countries](#)

Location Website: www.springfieldmaconventions.com

[Save](#) [Cancel](#)

Figure 24.23 – Add/Edit Location

Enter the default location and click **Save**. Or click **Cancel** to return without saving.

EVENT DEFAULTS

Select the **Configure – Event Defaults** option to define standard event information that you will use over and over again. The following screen is displayed:

Figure 24.24a – Event Defaults (top part)

The following options can be specified.

- If you frequently need members to “sign” a release agreement when registering for events, enter the title and text for this agreement here. When you create individual events, you can enable the release agreement and decide if you want to use the standard one or modify it.
- If many of your events have the same cancellation policy, you can also specify a standard one here. When you create individual events, you can enable the cancellation policy and decide if you want to use the standard one or modify it.

The Event Defaults screen continues below.

Default Calendar View

Week Begins On Sunday Monday (Refers to the grid view of the calendar)

Show Holidays Yes No

'Register' Button Text

Show capacity Yes No

Show available slots? Yes No

Maximum Companions Allowed (For events where companions are allowed) ◆

Non-Member / Companion Settings

	Non-Members	Companions / Guests
Company Name & Title	Show	Do Not Show
Address Fields	Show and Require	Do Not Show
Email Address	Show	Do Not Show
Phone	Show	Do Not Show

Chapters, etc.

Region Show Icon
 Select Color Select Letter

District Show Icon
 Select Color Select Letter

Chapter Show Icon
 Select Color Select Letter

Figure 24.24b – Event Defaults (bottom part)

- When members or non-members select the Calendar from the menu, you can define what view they will see. The following options are available:
 - Grid View
 - List View – Month
 - List View – Week
 - List View – Day
 - List View – Future (showing all future events)

- For the grid view, you can configure whether the week begins on Sunday or Monday. This setting controls the first column in the grid.
- The **Show Holidays** option determines if major public and religious holidays and other significant dates (for example, Halloween, Mother’s Day and the equinoxes/solstices) are shown.
- You can also specify the standard text for the **Register Button**. As with the above options, this text can be modified for each event.
- The **Show Capacity** option controls whether the capacity of a single-activity event or each activity in a multi-activity event is shown to everyone who is registering.
- The **Show Available Slots** option controls whether users can see how many people have already signed up. For popular events, you may want to show how many people have already signed up, or how few slots remain.
- The **Maximum Companions Allowed** option configures the default value for how many companions can be signed up by each registrant. This setting can be changed when you configure each event.

Non-Member / Companion Settings

The grid lists four general categories of non-member and companion data, and allows you to configure which fields should be displayed and which should be required. The options are:

- Do Not Show
- Show (not required)
- Show and Require

Changes made on this screen will apply to all new events created from this point forward. These settings can then be further customized for each event.

Chapters, Districts and Regions



If your club or association has subgroups, you can configure a special icon in the event calendar to indicate the subgroup level that is organizing this event.

Check the box if you want an icon defined at that level. Then specify the color and letter to use. For example, you might pick a red “C” at the chapter level and a blue “S” at the state level if that’s what your districts are called.

Click **Save** to save your entry and return to the list screen, or **Cancel** to return without saving.

NEW SINGLE ACTIVITY EVENT

To add a new event, click the **New Event** button. This will launch a wizard with either two screens for a single activity event or four screens for a multi-activity event. The following screen is displayed first (top section):



Home • Events Calendar • Migo Fall Fun Day • Edit Basic Event Info

Edit Basic Event Info

Use this screen to edit the basic event properties, including its title and visibility, date and time and the registration and fee options. Click Save to save your changes and return to the Event Administration screen, or Cancel to return without saving.

A single activity event can be changed to a multiple activity event, and vice-versa if the multi-activity event has only one activity.

Basic Info

Activities Single Multiple

Title

You may enter a detailed description for the event once it has been created by viewing the event details and clicking 'Description' on the Admin Ribbon Bar

Short Description

Used for the vCalendar description and as a tooltip in the Calendar

Category

Visibility

Event Web Page/Site

Contact Person

Show Email Show Phone Notify on Registration

Figure 24.25a – New Event Wizard – Step 1: Basic Event Info - top

The following sections describe the major elements of the Basic Info page.

Activities

In the ClubExpress model, events can have one or more “activities”. A single activity event takes place at one location, on one or more days and involves a single span of time; people sign up for the whole event. A multi-activity event may take place at multiple locations, on one day or a continuous sequence of days, with individual activities that occur on different days and/or different times, and which may require separate registrations and/or fees.

For example, a multi-activity event could be a day-long conference, with multiple technical sessions, keynotes, exhibit hall, demonstration sessions and an evening reception. Each activity has different times, locations and rules regarding attendance and pricing. Activities may also include add-on items, such as the conference T-shirt or a CD/book containing the presentation notes.

If you specify a multi-activity event, some configuration information moves from the event as a whole to the individual activities including, for example, the fees charged. The system will also add two pages to the New Event Wizard to allow you to define the event's activities.

Title and Short Description

Enter the title of the event. This title will be shown on the calendar grid and in list views, as well as in the heading of the event detail view. There are separate short description and long description fields, so the title should be succinct.

The Short Description is used in the vCalendar feature, when users add the event to their personal calendars. It's also used in the main calendar grid, as a popup tooltip when the mouse is hovered over the event title.

A much longer and fully formatted description can be defined once you've created the event.

Category

Event categories are defined by clicking the button on the Event Administration screen. You must define event categories before starting to create events. Categories can be color coded and events can be filtered by category.



Event Is For

If your club or association supports subgroups, this option specifies which subgroup is organizing this event. Subgroup administrators will see a reduced tree control or even just one option, depending on their level of administration.

Visibility

Four options are available for event visibility:

- Visible to everyone, members and non-members alike.
- Visible to members only. If the calendar is available on the public side of your website, these events will not be shown.
- Title visible to everyone (not clickable); details for members only.
- Not visible. The event is currently hidden. Use this option while you are defining the event, or if you need to take it offline for a period of time. Admins can still see it.

Event Web Page/Site

Many events need additional pages to describe everything that's happening. Use this option to configure a ClubExpress custom page with this information. Clicking the **Select** button displays a link selector, allowing you to link to a

custom page, photo page, document, external website or email address. (If you need multiple pages, use the specified custom page as a “jumping off point.”)

Contact Person

Click the Select link to define a member who serves as the event contact. The ClubExpress Select Member dialog will be displayed. Once a member has been selected, additional options appear:

- Click **Show Email** to display the contact’s email address with the event.
- Click **Show Phone** to display the contact’s phone number with the event.
- Click **Notify on Registration** to have the system send an email to the contact whenever anyone signs up for the event.

This contact will also have administrator rights over the event. He or she will be able to modify basic event properties, view registrants, run reports, etc.

The Basic Info form continues as shown below.

Schedule

Start Display 8:00 AM

Finish Display 5:00 PM

Do not show on next day of calendar if event runs past midnight

Show only start and end date on calendar if event spans multiple days

Figure 24.25b – New Event Wizard – Step 1: Basic Event Info - middle

Schedule

Specify the Start date and time and Finish date and time for the event. If you uncheck the **Display** checkboxes, the start and/or finish times will not be shown.

For a single activity event, the Finish Date does not need to be specified; if left blank, it is assumed to be the same as the Start Date. For a multi-activity event, both dates must be specified but times are not specified for the overall event. (Instead, they are specified at the activity level.)

For events that cross midnight and end on the next day but before 6:00 AM, check the box to show that the event should only be shown on the first day and not into the second.

For “events” that span a wide range of dates, you can configure the system to show the event only on the start and end dates. For example, if you are selling raffle tickets over 2 whole months, you might not want this “event” to appear on every single day in this range.

The Basic Info form continues as shown below.

Registration and Fees

Registration

Fee

Payment

Partial Payments Yes, allowed No

Financial Account

QuickBooks Item Name

Are Cancellations Allowed? Yes No

Registrant List Visibility None Public Members Only

'Register' Button Text

Select the non-member database category for non-members who register for this event (if allowed)

Track Attendance Yes No

Figure 24.25c – New Event Wizard – Step 1: Basic Event Info - bottom

Registration

The Registration field controls how online registration is handled. The following options are available:

Option	Register Now button
Not Required	Not displayed
Recommended	Displayed
Required	Displayed
Required by Date	Displayed until the date
Temporarily Unavailable	A note is shown that online registration is temporarily unavailable. This is the initial default while you are defining the event.
Closed	A note is shown that online registration has closed.
External	The button is displayed. Clicking it jumps to the specified external site.

Note that administrators will still see the Register Now under circumstances when other users will not see it (for example, if the event was in the past.)

Fee

Specify whether a fee is charged for all or part of the event. For a single activity event, the system will later prompt you to enter the fee(s) for the whole event for each registrant type. For a multi-activity event, the system will later prompt you to enter the fee(s) for each activity for each registrant type.

You can also select an option where “Members pay their own charges”. This option is suitable for an event held at a public location which charges a fee, such as a mother’s playgroup trip with kids to the local zoo. The club is not charging a fee per se, but the event does have a cost associated with it.

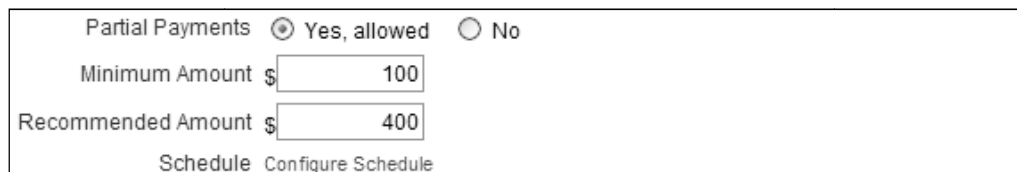
Payment

Specify whether payment must be collected in advance, or whether it will only be collected at the event, or whether either option is acceptable.

Partial Payments

For some types of events, you may enable partial payment support. This option is suitable where the event is expensive and may be paid in installments. For example, ski clubs often organize multi-day trips to a remote ski resort and members pay for the event over a number of months leading up to the event.

The default is No. Click “Yes, allowed” to enable partial payments. The screen will change to show the following additional fields:



Partial Payments Yes, allowed No

Minimum Amount \$

Recommended Amount \$

[Schedule](#) [Configure Schedule](#)

Figure 24.25d – Partial Payments for an Event

Specify the minimum amount that can be paid with each installment. The system will enforce the amount for members, although admins can bypass this limit. The recommended amount is shown on the payment screen when a member makes a payment. (If the actual amount owing is less than the recommended amount, this actual amount is used instead.)

If you click **Configure Schedule**, you will see a popup screen similar to the following:



Figure 24.26 – Payment Schedule for an Event

Payment schedules use percentages instead of actual dollar amounts because the amount owing may be different for each registration (based on the options selected and on the number of companions attached to the registration.)

Enter a date and percentage and click **Add**. Click **Remove** to remove an existing schedule item. The system tracks the total and status for you, and will not allow you to save the schedule until the total is 100%.

An event report is available to show you each registration for an event, the amounts paid, and whether that registration is up to date compared to the schedule.

Financial Account and QuickBooks Item Name

QuickBooks

Specify the financial account that will be used for event registration fees. If QuickBooks is enabled, specify the item name into which fees for this event will be categorized when you export transactions.

Are Cancellations Allowed?

If you want to allow members to cancel their event registrations, select **Yes** for this question. The screen will change to show the following additional fields:

Figure 24.25e – Are Cancellations Allowed?

Specify the date and time up to which a cancellation will be allowed. You can also specify an optional fee that will be charged.

When cancellations are allowed, members will see a Cancel option on their **Profile – Event History** screen, allowing them to cancel their registration. If there was no fee or if the fee had not been paid, the registration is simply marked as “cancelled”. If a fee had been paid, the registration is cancelled and a credit is issued to the member’s account, which can be applied to a future purchase.

Important Note: ClubExpress does not issue refunds. However, you can flag a credit as having been “used up” by a refund issued outside the system.

Registrant List Visibility

Select from one of the three options:

- None – the list of registrants is not available.
- Public – the list of registrants is available to everyone.
- Members Only – the list of registrants is only available to members.

If **Public** or **Members Only** is selected, the event details page shows a “Registrants” button. Clicking this button displays a list of people who have already signed up for the event. Some people like to see who’s coming before they decide whether to come (or not!)

Register Button Text

Use this option to specify the text on the Register Now button. You can configure a default to use for all your events on the **Event Defaults** screen. If you don’t have a default and you leave this field blank, the system will use “Register Now”.

Track Attendance

Select **Yes** to record attendance for this event. A new “Attendance” option will appear on the admin ribbon bar allowing you to record who actually attended.

For clubs that track attendance throughout the year, you can also flag this event as being eligible for attendance credit. Many community service clubs (Rotary, Lions, Exchange, etc.) require members to attend a minimum number of events throughout the year. You can set these options on the Control Panel – Club Options screen.

At the event level, ClubExpress includes a report to track who attended each event. At the event module level, ClubExpress includes a report to track each member and how many events he or she attended within a specified date range.

Non-Member / Companion Settings

For each of non-members and member companions/guests, you can separately control what data is collected.

Non-Member / Companion Settings		
	Non-Members	Companions / Guests
Company Name & Title	Show ▼	Show ▼
Address Fields	Show and Require ▼	Show ▼
Email Address	Show ▼	Show ▼
Phone	Show ▼	Show ▼
Maximum companions <input type="text" value="2"/> (If companions are allowed)		
Non-Member Category <input type="text" value="2008 Peach State 1/2 Marathon"/>		
<input type="button" value="Save ✓"/> <input type="button" value="Cancel ✕"/>		

Figure 24.25f – Non-Member / Companion Settings

The grid lists four general categories of non-member and companion data, and allows you to configure which fields should be displayed and which should be required. The options are:

- Do Not Show
- Show (not required)
- Show and Require

Note with the Address fields that even if they are required, “Address2” is always optional.

If companions are allowed, the “Maximum Companions” controls how many companions may be added to the registration by the primary registrant. You can set the initial or default value of this option on the **Event Defaults** screen.

If non-members can register for the event, you can specify the category in the non-member database that will be used for these registrants. The default is a system category called “Event Registrants”.

Click **Next** to proceed to the next page (More Info) of the event definition wizard. The following screen is shown:

More Info

When you click **Next** you will see the second page of the Create New Event wizard, shown below in three sections.

Home • Events Calendar • Spring Dinner • Edit Event More Info

Edit Event More Info

Use this screen to edit additional information on the event, including the detailed description, location, and release agreement if required. The event report and photo page options allow you to link the event details page to a custom page and photo page describing the event after it has taken place. Click Save to save your changes and return to the Event Administration screen, or Cancel to return without saving.

Spring Dinner

Location

Location Locations ▼

Address

City

State/Province

Zip/Postal Code

Country [Show All Countries](#)

Metro Area

Show Map Link

Location Phone

Location Website

Email Confirmation

Additional Info

Text entered here will appear on the event registrant's confirmation email.

Release Agreement

Required? Yes No

Event Rules

Event Rules

Cancellation Policy

Required? Yes No

Figure 24.27a – New Event Wizard – Step 2: More Info – top

Location

Specify the location information, including the site name and description, address, city, state, zip/postal code, country, metro area (if defined), phone and website. ClubExpress supports multiple default locations; click the **Locations** button to select one of them and have its information inserted.

Check the **Show Map Link** box to enable a MapQuest icon, which can be clicked to display a map of the location.

For a multi-activity event, these fields allow you to specify the overall location of the event. You can also specify a location for each activity.

Email Confirmation

Any information entered in this text box will be added to the event registration confirmation email that is sent out once the registration is complete. This field can be used to communicate additional information to event registrants.

Note however that, for events with a fee, the event registration confirmation email is sent out before payment is made (a second email is sent once payment is complete.) This option should not be used if you only want to communicate information to paid registrants.

Release Agreement

If this event requires a release agreement (waiver of liability), select **Yes** and additional options will appear. If you want to use the default agreement, select **Yes** for the second option. To use a custom agreement, select **No** and specify the title and text of the agreement. You can also click the **Copy Default** button to use the default agreement as a starter.

If a release agreement is defined, a new screen is added to the event registration wizard, immediately before the summary page is displayed.

Event Rules

Use this field to describe any special rules that attendees should know before signing up for the event. It will only be shown on the event details page if it's not blank.

Cancellation Policy

If this event requires a written cancellation policy, select **Yes** and additional options will appear. If you want to use the default policy, select **Yes** for the second option. To use a custom policy, select **No** and specify the title and text of the policy. You can also click the **Copy Default** button to use the default policy as a starter.

The description of the More Info page continues below.

Event Report

Event Report Page

Event Photo Page

Capacity

Is the capacity of this event limited? Yes No

Capacity

Show capacity? Yes No

Show available slots? Yes No

Registrants & Fees

Does the fee change after a certain date? Yes No

Change Date

Registrant Type	Fee	Fee After Date
<input type="checkbox"/> Companions Only	\$ N/A	\$ N/A
<input checked="" type="checkbox"/> Member & Companions	\$ <input style="width: 40px;" type="text" value="0.00"/>	\$ <input style="width: 40px;" type="text" value="0.00"/>
<input type="checkbox"/> Non-Member	\$ N/A	\$ N/A
<input type="checkbox"/> Non-Members & Companions	\$ N/A	\$ N/A
<input type="checkbox"/> Participant	\$ N/A	\$ N/A
<input type="checkbox"/> Registration Plus Membership	\$ N/A	\$ N/A

In the grid to the left, use the checkboxes to select the registrant types which are allowed to register for this event. If a fee is required, enter the fee (or fees, if there is a fee change date) for each allowed registrant type.

Figure 24.27b – New Event Wizard – Step 2: More Info – bottom

Event Report and Photos

Click the **Event Report Page** option to select a ClubExpress custom page for the event report, a description or narrative of what happened at the event. The page must have already been defined.

Click the **Event Photo Page** option to select a ClubExpress photo page containing photos of the event. The page must have already been defined.

Capacity

If the event capacity is limited, select **Yes** then specify the maximum number of attendees that can be accommodated for the event. Capacity is strictly enforced for members and non-members registering for events (although admins can always add members even if the event is full.) If an event is close to capacity and

multiple people are signing up at the same time, some of them may not be able to complete their registrations since the event will fill up *under them*.

You also have the option of showing the capacity and of showing the number of available slots, which you might do if you expect the event to be popular and there are limited slots available.

Registrants and Fees

This section allows you to define who can come to the event and what each registrant type will pay. It will not be displayed for a multi-activity event because this information is specified for each activity, not at the event level.

If the event fees change after a cut-off date, select **Yes** then specify the date. Note: the date entered represents the first day that the new fee applies.

Registrant Types

The grid shows a list of available registrant types, which must have already been defined on the event calendar manager (click the **Registrant Types** button.) Check a registrant type to enable it for this event. If there is a fee, you can enter the fee beside the type. If the fee changes after a specific date, you will see a second column for entering the fees after the cut-off date.

You can have any number of registrant types pre-defined. Each “registrant type” represents a category of someone who can register for an event, with various settings defining whether that type includes members, non-members, and/or their companions. For example, you might define a registrant type called “Student” and specify who can be included in this category.

Then, for each event, decide if that registrant type of person is appropriate to attend and what fee (if any) they will pay. Keep in mind that some registrant types may be included in other types. For example, if students can attend this event at a reduced fee, check the “Student” type you previously defined and specify the fee. But students pay the same fee as everyone else, there is no need to enable a “Student” type since you probably already have an “Adult” or an “Everyone” registrant type.

For more information on Registrant Types, see page 339.

If this is a single activity event, click **Save** to save the new event and return to the Event Administration screen.

Technology Convenience Fee

When non-members register for events and pay online by credit card, and if your club or association is using the built-in merchant account, ClubExpress will charge an additional “Technology Convenience Fee”.

Event Cost	ClubExpress Fee
Up to \$10.00	\$1.00
\$10.01 to \$50.00	\$2.00
\$50.01 to \$250.00	\$3.00
\$250.01 to \$500.00	\$4.00
\$500.01 and higher	\$5.00

(This fee is not charged when members register for events, or when non-member registrations are paid by other than a credit card online, or if your club or association has its own merchant account.)

By default, the fee appears as a special line item on the payment page once the non-member selects “Credit Card on this Website” as the payment method.

You also have the option of hiding this fee from users. It will still be charged but instead will be taken out of cost of the event to be paid to the club. (Contact ClubExpress to enable this option.) If you do enable this option, be sure to specify the non-member cost of the event so that it allows for this fee to be charged.

NEW MULTI-ACTIVITY EVENT

If this is a multi-activity event, as defined on the first screen of the wizard, the Registrants and Fees section on the second screen of the wizard (described above) will not appear because this information is now specified at the activity level rather than for the whole event. Click **Save** to save the first two screens and proceed to the Activities screen to define activities or items for the event. You will see a screen similar to the following:

The screenshot shows a web browser window with the following content:

- Navigation bar: Home • Events Calendar • Events Calendar Manager • Strategy Sessions • Activities
- Section Header: **Event Activities/Items**
- Event Context: **For Event: Strategy Sessions**
- Instructional Text: "This wizard screen is displayed when you specified that the event has multiple activities. Click the 'New Activity' button to add an activity to the event. You will see a single screen to define the basic information, properties and fees for the activity. Click 'New Item' to define an item (something people 'buy' as part of the event rather than 'attend'.) When you have finished adding activities, click the 'Return to Previous Page' screen to return to the Event Administration screen. Display Sequence is used to order the activities when they are displayed to a registrant."
- Buttons: **New Activity**, **New Item**, **Display Sequence**
- Table:

Activity	Type	Visible	Selected	Maintain
Strategy 1 8/8/2007 8:00 AM	Activity	Yes	No	Edit Registrations Delete Reports
Strategy 2 8/8/2007 8:00 AM	Activity	Yes	No	Edit Registrations Delete Reports
Strategy 3	Item	Yes	No	Edit Registrations Delete Reports

Return to Previous Page

Figure 24.28 – Defining Activities/Items for a multi-activity event

New Activity

Click **New Activity** to define an activity for the event. The following screen will be displayed:

Home • Events Calendar • Shoe Horse Race2 • Activities • Activity

Edit Activity

For Event: Shoe Horse Race2

Specify the details for this activity which is a session or event option that people actually attend. Activities can be at the same location as the event or a different location. Specify the registrant types who can sign up for this activity and, if necessary, the fees for each type. You can also specify a capacity limit which will be enforced during registration. Click Save to save your changes and return to the Event Activities/Items screen, or Cancel to return without saving.

Title & Description

Activity Title

Description

Financial Account

Visible Yes No

Not Selected Selected Selected and Required

Schedule

Date

Start Finish

Location

Same as Event? Yes No, this activity has a different location

Location

Address

City

State/Province

Zip/Postal Code

Country [Show All Countries](#)

Location Phone

Location Website

Figure 24.29a – New Activity - top

Activity Title & Description

Specify the activity title and description (text only, no attributes.) Use the **Visible** option to control whether the activity will be displayed. Check **Selected by Default** to specify an activity that should be enabled for all users (although they can still remove it.)

Financial Account

Specify the financial account into which registration fees for this activity should be allocated.

Visible and Selected

Individual activities can be made visible or hidden, perhaps based on registrations (leading people towards different options, etc.) You can also configure the activity to be “selected” by default for registrants, or to be selected and required (it cannot be unchecked.)

Schedule

Use the **Schedule** option to specify the date, start time and finish time for the activity. The date must be within the date range for the event but a single activity can run over more than one day.

Location

If the activity is being held at the main event location, click the **Yes** option and this location will be used automatically. If you click **No**, a full set of location fields will be displayed, including a **Copy Event Location** button to copy the main location over as a starting point.

The description of the Edit Activity screen continues below.

Capacity

Is the capacity of this activity limited? Yes No

Capacity

Show capacity? Yes No

Show available slots? Yes No

Registrants & Fees

Is registration required for this activity? Yes No

Will a fee be charged for this activity? Yes No

Does the fee change after a certain date? Yes No

Change Date

Registrant Type	Fee	Fee After 10/27/2007
<input type="checkbox"/> Companions Only	\$ N/A	\$ N/A
<input checked="" type="checkbox"/> Member & Companions	\$ <input type="text" value="35.00"/>	\$ <input type="text" value="40.00"/>
<input checked="" type="checkbox"/> Non-Member	\$ <input type="text" value="50.00"/>	\$ <input type="text" value="55.00"/>
<input type="checkbox"/> Non-Members & Companions	\$ N/A	\$ N/A
<input checked="" type="checkbox"/> Participant	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
<input type="checkbox"/> Registration Plus Membership	\$ N/A	\$ N/A

In the grid to the left, use the checkboxes to select the registrant types which are allowed to register for this activity. If a fee is required, enter the fee (or fees, if there is a fee change date) for each allowed registrant type.

Figure 24.29b – New Activity - bottom

Capacity

If the capacity of this activity is limited, select **Yes** then specify the maximum number of attendees that can be accommodated. Capacity is strictly enforced for members and non-members registering for activities (although admins can always add members even if the activity is full.) If an activity is close to capacity and multiple people are signing up at the same time, some of them may not be able to register for this activity since it will fill up *under them*.

You also have the option of showing the capacity and of showing the number of available slots, which you might do if you expect the activity to be popular and there are limited slots available.

Registrants & Fees

You may want to configure an activity to be required for all attendees. If so, click **Yes** to the first question.

The remaining options in the section behave the same way as for a single activity event, allowing you to define valid registrant types and fees for this activity.

Click **Save** to save the new activity and return to the Event Activities/Items screen, or **Cancel** to return without saving.

New Item

Click the **New Item** button to add a new item. Event items are things that people buy as part of an event, rather than something that they attend (for example, a convention sweatshirt.) A screen similar to the following is displayed.

Home • Events Calendar • NCLB Update • Activities • Activity

Edit Item

For Event: NCLB Update

Specify the details for this item, which is an object that people can purchase as part of the event. Items do not have a location, date or time but they do have fees and optional quantity limits. Click Save to save your changes and return to the Event Activities/Items screen, or Cancel to return without saving.

Title & Description

Item Title

Description

Account

Visible Yes No

Selected By Default?

Capacity

Is the quantity of this item limited? Yes No

Registrants & Fees

Will a fee be charged for this item? Yes No

Does the fee change after a certain date? Yes No

Registrant Type	Fee
<input type="checkbox"/> Companions Only	\$ N/A
<input checked="" type="checkbox"/> Member & Companions	\$ <input type="text" value="10.00"/>

In the grid to the left, use the checkboxes to select the registrant types which are allowed to register for this item. If a fee is required, enter the fee (or fees, if there is a fee change date) for each allowed registrant type.

Figure 24.30 – New Item

The screen is similar to the New Activity screen but without the Location and Schedule panels. And in place of a capacity for the event, there is a quantity field; once all of the items have been sold, this item is flagged as Sold Out.

Click **Save** to save the new item and return to the Event Activities/Items screen, or **Cancel** to return without saving.

Activities – Other Options

Click the **Edit** option to modify an activity or item. There is no Delete option because there may be paid registrations that include this activity or item; instead, just edit the activity or item and set its **Visible** flag to No.

Click **Registrations** to see a list of people registered for this activity or item.

Click **Reports** to display the standard ClubExpress reports dialog, with a list of reports available for that activity.

Click **Display Sequence** to bring up the standard ClubExpress sequencer. This controls the order that activities and items appear on the event details screen.

When you have finished defining activities and events, click **Return to Previous Screen** to return to the main Event Administration screen.

EDITING EVENTS

Once an event has been created, further changes to the event are made from the Event Details screen. You can get to this screen in two ways:

- From the Grid View or a List View, click the event title.
- From the Event administration screen, click the **View/Edit** link.

On the Event Details screen, a special administrator “ribbon” will be visible to club administrators, event module coordinators and event contacts.

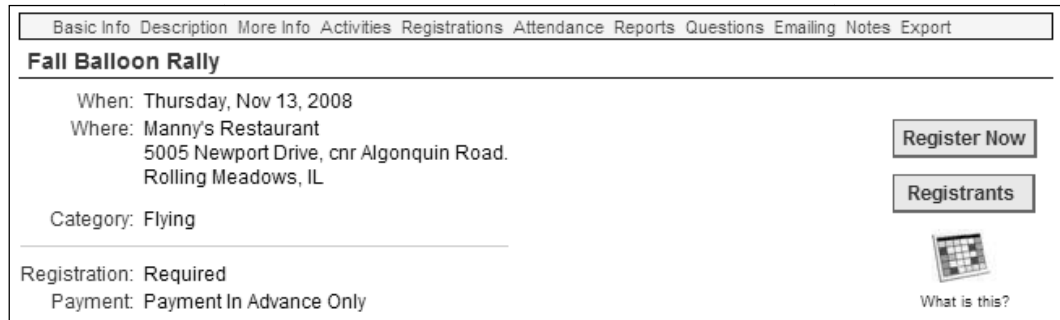


Figure 24.31 – Event Details – Administrator Ribbon

Basic Info

Click **Basic Info** to modify information on the first page of the new event wizard, including title, short description, category, visibility, contact, date and time, registration and fees, non-member and companion settings.

If you change the date of a multi-activity event, the system will attempt to change the dates of each activity in lock-step. But you should review these dates to be sure that they are what you intended.

Description

Click **Description** to enter a detailed description of the event using the advanced content editor. You will see a screen similar to the following:

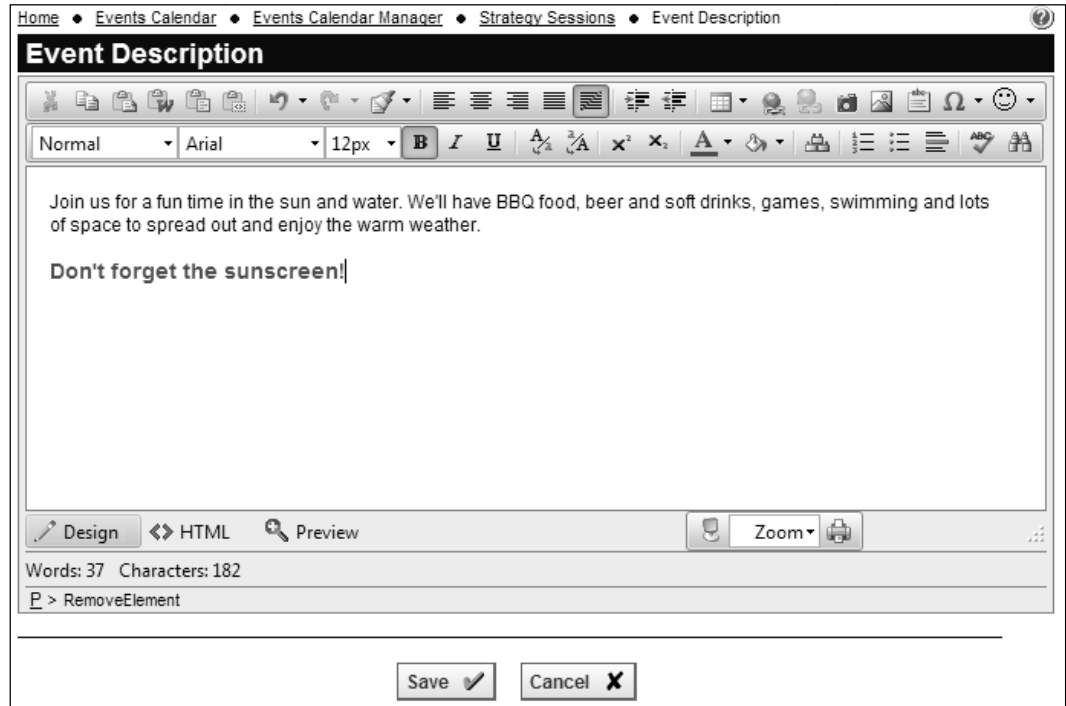


Figure 24.32 – Event Description screen

The advanced content editor supports a full range of text editing and formatting tools. It is described in detail in Chapter 16.

More Info

Click **More Info** to modify information on the second page of the new event wizard, including location, release agreement, event rules, cancellation policy, event report, and, for a single activity event, registrants and fees.

Activities

For a multi-activity event only, click **Activities** to view and modify activities and items for the event. This option does not appear for a single-activity event.

Registrations

Click **Registrations** to see a list of registrations for the event. A screen similar to the following will be displayed:

The screenshot shows the 'Registration Manager' interface for the event 'Attendee Test'. The summary box indicates 11 registrations (14 registrants) for Thursday, Sep 30, 2010. Below the summary are three buttons: 'Add Registration', 'Delete Unpaid Registrations', and 'Attendance'. The main data table lists individual registrants with columns for Registrant, Type, Contact, Date, Fee (\$), Registrants, Status, and Maintain. The 'Maintain' column contains links for 'Details Profile' and 'Delete'.

Registrant	Type	Contact	Date	Fee (\$)	Registrants	Status	Maintain
Alan Adams	Member	ray@clubexpress.com 111-111-1111	9/15/2010	25.00	1	Canceled	Details Profile Delete
Don Adams	Member	312-555-1212	9/15/2010	25.00	1	Canceled	Details Profile Delete
Carol Brady	Member	danm@clubexpress.com	9/15/2010	25.00	1	Open	Details Profile Payment Cancel
mike brady	Member	michelle@clubexpress.com	9/15/2010	25.00	1	Paid	Details Profile Cancel
Juliet Burke	Member		9/15/2010	25.00	1	Open	Details Profile Payment Cancel
John Connor	Member	support@clubexpress.com 847-111-2222	9/22/2010	25.00	1	Canceled	Details Profile
Adam Grant	Member	312-123-1234	9/15/2010	25.00	1	Open	Details Profile Payment Cancel
Jin Kwon	Member	michelle@clubexpress.com	9/15/2010	25.00	1	Open	Details Profile Payment Cancel

Figure 24.33 – Event Registrations

This screen shows the registrant (member or non-member) who went through the registration wizard, his or her registrant type and contact information, the total fee paid, the number of people included in the registration (including the registrant) and the status:

- Paid
- Open – still to be paid.
- Cancelled.

To view the details of the registration click the **Details** link. You will see a popup screen similar to the following:

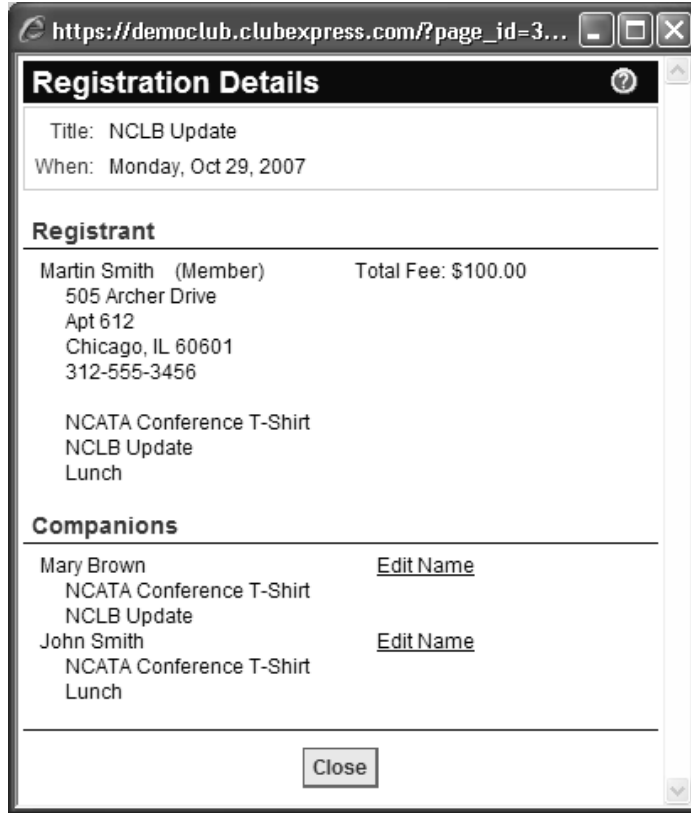


Figure 24.34 – View Registration Details

This screen shows the primary registrant and companions. For multi-activity events, it also shows the activities for which each person is registered.

Click the [Edit Name](#) link to modify the name of the registered companion. You will see a simple popup form to specify new first and last names.

For Open registrations, click the **Payment** option to jump to the payments screen when a check arrives or if cash is used.

Click the **Cancel** option to cancel an open or paid registration. You will be prompted to confirm this step. If the registration has already been paid, clicking Cancel does not issue a refund but it does create a credit for that member or non-member and you can then flag this credit as having been “used” in the form of a refund.

If the registration has not already been paid, this step also deletes the pending transaction. You will then see a **Delete** link that allows you to delete the cancelled registration completely (so that it no longer appears in the list.)

The **Add Registration** button allows you to launch the registration wizard, for example if someone is registering at the event or by phone.

Click the **Delete Unpaid Registrations** button to cancel and completely remove registrations that have not been paid, perhaps to free up capacity. You will be asked to confirm this action.

Attendance

If you have flagged the event to track attendance, this option will appear on the admin ribbon bar. Click it to see a form similar to the following:

Figure 24.35a – Attendees – Initial Version

Select “Pre-registered members, non-members & companions” and the screen will refresh as follows.

Figure 24.35b – Pre-registered Attendees

You will see an alphabetical list of everyone registered for the event, with a checkbox beside each person’s name. Check the names of people who have attended and click **Save** to record their attendance. You can also click Check all or Uncheck all. Record as many or as few names as you need; when the form is redisplayed, it will only show names of people whose attendance has not yet been recorded.

Select “Not-yet-registered members, no companions” and the screen will refresh as follows:

Home • Events Calendar • Fall Balloon Rally • Attendees

Attendees

This screen allows you to track attendance of event registrants.

Title: Fall Balloon Rally
 When: Thursday, Nov 13, 2008
 Recorded Attendees: 0 member(s), 0 non-member(s), 0 companion(s)

Mark attendance for:

Pre-registered members, non-members & companions
 Not-yet-registered members, no companions
 Not-yet-registered members with companions

Registrant Type: < Select >

- Callie Abrams
- Eric Abrams
- Lisa Abrams
- marcelle alperstein
- J Bagwell
- Barry Bonds
- Brion Burcham

Figure 24.35c – Not-yet-registered members, no companions

You will see an alphabetical list of members who are not registered for the event. Select a registrant type then check or uncheck as many people as you need to record, then click **Save**. The system will generate the event registration records and flag their attendance. If there is a fee for that registrant type, the system will also create the transaction and a pending payment. You can record the payment immediately or ask the member to login later to complete payment. (Note that the system does not currently implement paging in displaying this list so for large clubs, this will be a very large page. Please be patient.)

At the event level, the system includes an attendance report to show who was there.

In the future, we will also support an option to record attendance for not-yet-registered members with companions. For now, you can handle these registrations using the main Registration wizard, then record their attendance as a two-step process.

Reports

Click **Reports** to see a popup dialog of the available reports for the event. Select a report and click **Next** to specify an output option and run the report. Reports are available in PDF, HTML, Word and Excel formats.

Event-Specific Questions

Click **Questions** to define event-specific questions. You will see a screen similar to the following:

Home • Events Calendar • Events Calendar Manager • NCLB Update • Event Questions

Event Questions

Select which event-specific questions should appear at each level for this event. A question can only appear once, so if you select it at one level, it won't be available at other levels. You must "create" the questions by clicking the Event Questions button in the Event Manager screen. Then they will be available when you click the Add Question buttons on this screen.

Registration Questions

These questions are answered only once per registration, no matter how many registrants and activities are included.

Add Question

Question	Required	Maintain
No questions found.		

Registrant Questions

These questions are answered only once per registrant, no matter how many activities are included.

Add Question

Question	Required	Maintain
Shirt Size	Yes	Edit Delete

Activity Registrant Questions

These questions are answered for each registrant who has signed up for the specified activity.

Add Question

Question	Activity	Required	Maintain
Entree Choice	Lunch	Yes	Edit Delete

[Return to Previous Page](#)

Figure 24.36 – Defining event-specific questions

You must first define questions under the Event Manager – Configure – Questions screen before you can assign them to events.

This screen is divided into three sections, one for each level at which a question can be defined:

1. Questions that apply to the registration as a whole (rather than a person within the registration.) For example, “Will your group be staying at the official event hotel?”
2. Questions that apply at the event level but separately for each registrant and companion. For example, “What is your T-shirt size?”
3. Questions that apply at the activity level for each registrant or companion signed up for that activity, but not to anyone who is not signed up for that activity. For example, “Do you want the chicken entrée or the fish entrée for dinner?” (This option will only show up for multi-activity events.)

Available questions are defined from the Event Manager screen, by clicking the **Event Questions** button. See page 342 for more information.

Each question can appear only once across all three levels, so in the rare instance where you need a question at more than one level, you will have to define it twice.

Click **Add Question** to display a popup list of available questions. Select one and click **Save**, or click **Cancel** to close the dialog without saving. Once a question is selected, it won't appear for the other categories.

Use the **Display Sequence** option to control the order of questions within a category. The button will appear as soon as there are 2 or more questions listed.

Click the **Edit** option to change whether or not an answer is required for the question and, for Activity – Registrant questions only, which activity the question is linked to. Click the **Delete** option to remove that question from the grid.

Emailing

Click **Emailing** to send an email to everyone registered for the event (the primary registrant only, not companions.) You will see a screen similar to the following:

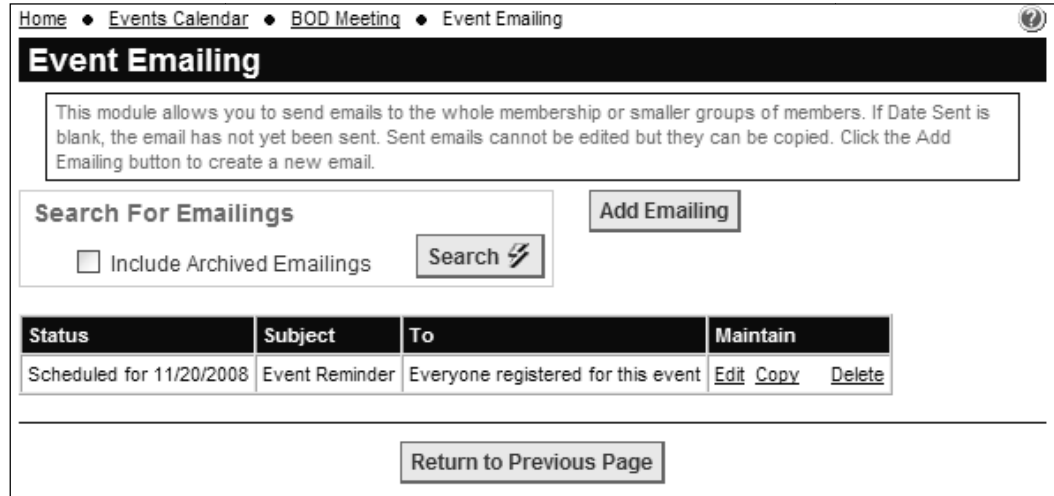


Figure 24.37 – Event Emailing

Click the **Search** button to view emailings already defined for the event. Click **Add Emailing** to add a new emailing. You will see the same Add Emailing dialog that's available on the Control Panel to send general emailings to members and non-members (explained in detail on page 146.)

The **To** selection has some additional options for sending event-specific emails:

- Everyone registered for this event
- All active members not registered for this event
- All non-members not registered for this event
- All registrants who have paid for this event
- All registrants who have *not* paid for this event

Note that you can use the **Send** option to schedule event reminder emails for a future date, for example a couple of days before the registration deadline, or three days before the event.



There is also a special icon on the right side (above the toolbars). When clicked, it will insert the details of the current event into the email at the cursor position.

Notes

Click **Notes** to write notes on the event that are then available to other event administrators. You will see a screen similar to the following:

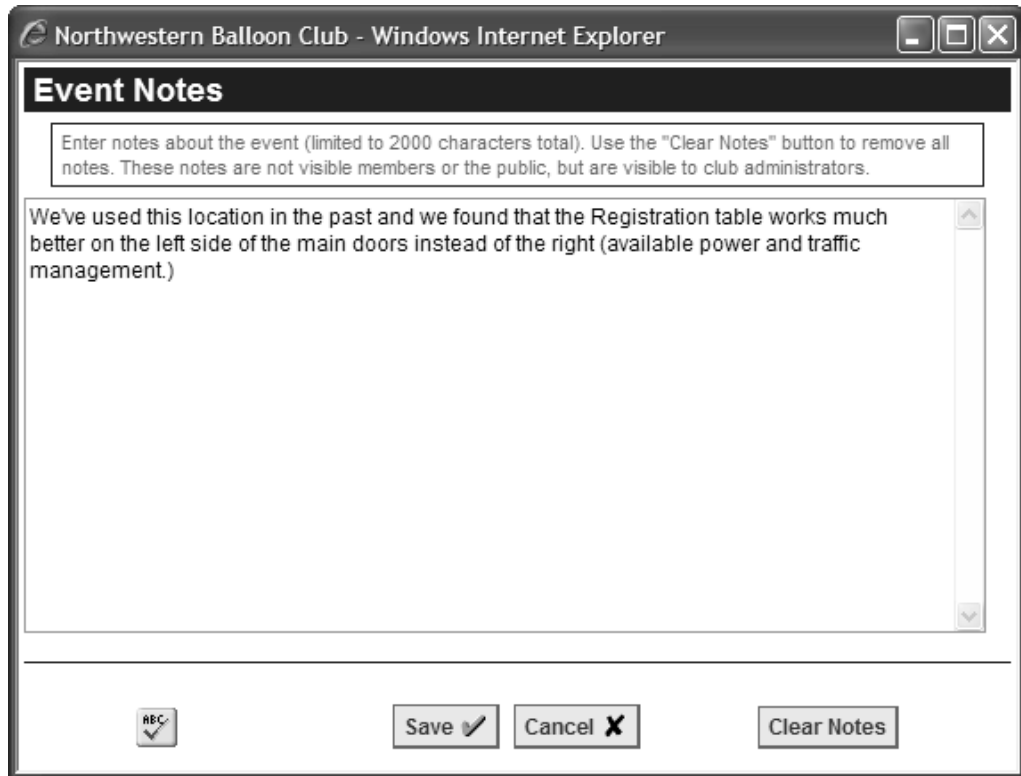


Figure 24.38 – Event Notes

Enter your notes and click **Save** to save and return, or click **Cancel** to close the form without saving. You can also clear the current notes and spellcheck them.

Export

Click **Export** to generate one or more CSV files (suitable for loading into Excel) of event registration data. You will see the following screen:

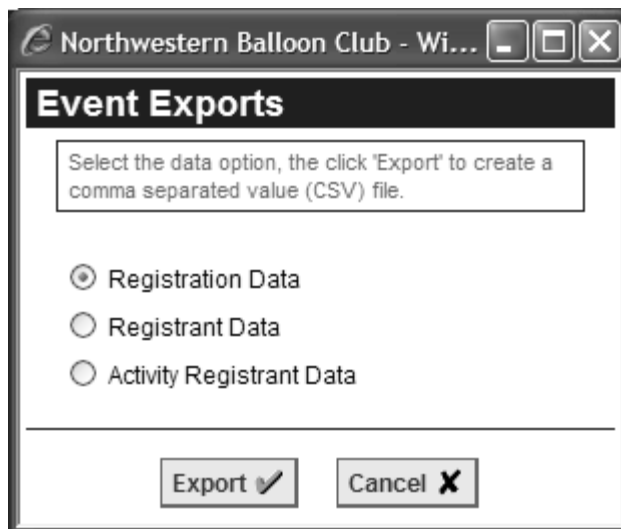


Figure 24.39 – Event Exports

Because of the nature of event registration data, it's not possible to everything into a single export file. Each registration may contain multiple registrants, and each registrant may be signed up for multiple activities. You can also have event-specific questions at each of these three levels.

Select the export option you want and click **Export**. Your system will prompt you to save the file to your local hard disk, or to open it directly in Excel or another spreadsheet program.

COPY EVENT

Click the **Copy** option to make a copy of an event, including all properties and activities but not registrant data. After you have defined an event, this option will allow you to copy it one or more times. You will see the following screen:

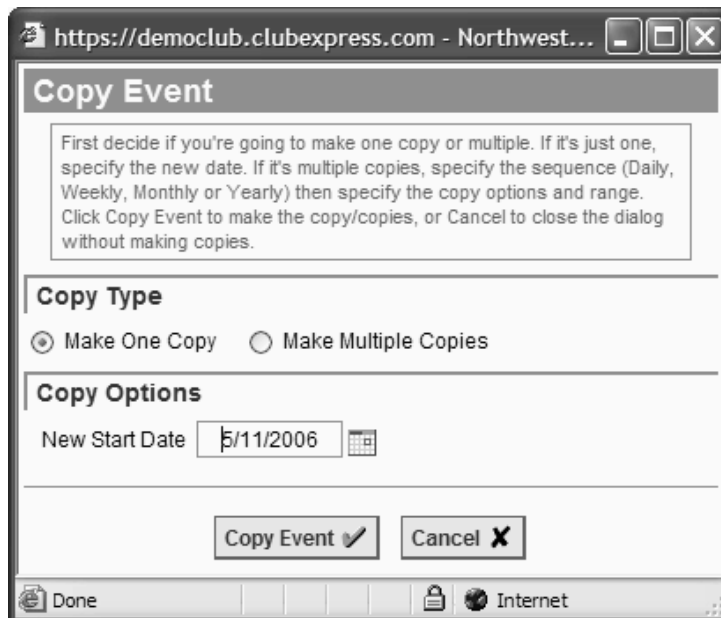


Figure 24.40 – Copy event dialog

Make One Copy

Specify the new start date and click **Copy Event**. A copy of the event is made to the new date. Note that the old and new events are not connected in any way. Changes made to one of them will not be reflected in the other.

Make Multiple Copies

Begin by specifying the copy frequency and the new start date for the recurring copies. Then specify the options that pertain to the chosen frequency. If you choose **Daily**, the following screen will be displayed:

The screenshot shows a web browser window with the address bar displaying "https://democlub.clubexpress.com - Northwest...". The main content area is a dialog box titled "Copy Event". Inside the dialog, there is a text box with instructions: "First decide if you're going to make one copy or multiple. If it's just one, specify the new date. If it's multiple copies, specify the sequence (Daily, Weekly, Monthly or Yearly) then specify the copy options and range. Click Copy Event to make the copy/copies, or Cancel to close the dialog without making copies." Below this, there are three sections: "Copy Type" with radio buttons for "Make One Copy" and "Make Multiple Copies" (selected); "Copy Options" with radio buttons for "Daily" (selected), "Weekly", "Monthly", and "Yearly"; and "Copy Range" with radio buttons for "End after 10 occurrences" (selected) and "End by". The "New Start Date" is set to "5/11/2006". At the bottom of the dialog are "Copy Event" and "Cancel" buttons. The browser's status bar at the bottom shows "Internet".

Figure 24.41 – Copy multiple events on a daily frequency

You can copy the event every 1 to X days or on every weekday. For the Copy Range, specify a number of occurrences or the finish date. A maximum of 50 copies can be made. The example shows an event that's copied every three days for 10 occurrences.

If you choose **Weekly**, the following screen will be displayed:

The screenshot shows a web browser window with the address bar displaying "https://democlub.clubexpress.com - Northwest...". The main content area is a dialog box titled "Copy Event".

At the top of the dialog is a text box with the following instructions: "First decide if you're going to make one copy or multiple. If it's just one, specify the new date. If it's multiple copies, specify the sequence (Daily, Weekly, Monthly or Yearly) then specify the copy options and range. Click Copy Event to make the copy/copies, or Cancel to close the dialog without making copies."

The dialog is divided into three sections:

- Copy Type:** Contains radio buttons for "Make One Copy" (unselected), "Make Multiple Copies" (selected), "Daily" (unselected), "Weekly" (selected), "Monthly" (unselected), and "Yearly" (unselected).
- Copy Options:** Includes a "New Start Date" field with the value "5/11/2006" and a calendar icon. Below it is "Every 2 week(s) on:" followed by checkboxes for days of the week: Mon (unselected), Tue (unselected), Wed (unselected), Thu (unselected), Fri (unselected), Sat (checked), and Sun (unselected).
- Copy Range:** Contains radio buttons for "End after 20 occurrences" (selected) and "End by" (unselected) with a calendar icon. Below this is the text "A maximum of 52 new events can be created."

At the bottom of the dialog are two buttons: "Copy Event" with a checkmark icon and "Cancel" with an X icon.

The browser's status bar at the bottom shows a lock icon, a globe icon, and the text "Internet".

Figure 24.42 – Copy multiple events on a weekly frequency

You can copy the event every X weeks, with individual control over which days of the week will receive the copies. For the Copy Range, specify a number of occurrences or the finish date. A maximum of 52 copies can be made. The example shows an event that's copied every other Saturday for the next 38 weeks (20 times).

If you choose **Monthly**, the following screen will be displayed:

The screenshot shows a web browser window with the URL `https://democlub.clubexpress.com - Northwest...`. The main content is a dialog box titled "Copy Event".

Copy Event

First decide if you're going to make one copy or multiple. If it's just one, specify the new date. If it's multiple copies, specify the sequence (Daily, Weekly, Monthly or Yearly) then specify the copy options and range. Click Copy Event to make the copy/copies, or Cancel to close the dialog without making copies.

Copy Type

Make One Copy Make Multiple Copies

Daily Weekly Monthly Yearly

Copy Options

New Start Date: [calendar icon]

Day 1 of every 1 month(s)

The of every month(s)

Copy Range

End after occurrences

End by [calendar icon]

A maximum of 24 new events can be created.

Buttons:

Browser status bar: Internet

Figure 24.43 – Copy multiple events on a monthly frequency

You can copy the event to a specific day of the month and every X months. Or you can copy to the first, second, third, fourth or last day of the week of every X months. For the Copy Range, specify a number of occurrences or the finish date. A maximum of 24 copies can be made. The example shows an event that's copied to the second Tuesday of the month for the next 12 months.

If you choose **Yearly**, the following screen will be displayed:

Copy Event

First decide if you're going to make one copy or multiple. If it's just one, specify the new date. If it's multiple copies, specify the sequence (Daily, Weekly, Monthly or Yearly) then specify the copy options and range. Click Copy Event to make the copy/copies, or Cancel to close the dialog without making copies.

Copy Type

Make One Copy Make Multiple Copies

Daily Weekly Monthly Yearly

Copy Options

New Start Date

Every

The of

Copy Range

End after occurrences

End by

A maximum of 12 new events can be created.

Figure 24.44 – Copy multiple events on a yearly frequency

You can copy the event to a day of a specific month. Or you can copy to the first, second, third, fourth or last day of the week of a specific month. For the Copy Range, specify a number of occurrences or the finish date. A maximum of 12 copies can be made. The example shows an event that's copied to the first Sunday in June for the next 5 years.

Click **Copy Event** to initiate the copy.

Important Note: Unlike some personal information managers like Outlook, copied events are no longer connected to the original event; they exist as separate events in the ClubExpress calendar. If you need to make a change after having made the copy, it will need to be made separately to every instance of the copied event. So you should check the source event carefully before making the copy to be sure that it's exactly what you want!

ARCHIVE / DELETE

This option will be different depending on whether the event has registrations or not and whether it has been archived or not.

- **Archive/Delete** will be shown if the event does not have registrations. You will see a dialog allowing you to archive the event (including the ability to specify a new event category) or to delete it.
- **Archive** will be shown if the event has registrations (so it cannot be deleted.) You will see a dialog allowing you to archive the event, including the ability to specify a new event category.
- **Unarchive** will be shown if the event is already archived; select this option to re-activate it.



Figure 24.45 – Archive / Delete events

Archived events are not included in the event list by default. You must explicitly check the **Archived Events** box in order to show them.

Another way to organize archived events, as shown in the dialog above, is to create one or more event categories for these archived events.

NOTIFICATIONS

A notification is a calendar entry without an event behind it. You use it to notify members of a deadline or milestone, such the date by which comments on a new proposal must be received, or the anniversary date of a major occurrence in club history, or even just as a reminder of an upcoming public holiday. Notifications don't have reports or photos.

To add a notification, click the **New Notification** button. You will see the following screen:

Figure 24.46 – New Notification

Specify the title, a short description, category and visibility for the notification and its start and finish dates. The short description is displayed as a popup “hint” when users mouse over the notification in the calendar. Use the External website option to make the notification clickable, allowing users to jump to the other site for more information. (Note that the other website appears in a new window.) Click **Save** to save and return to the Event Administration screen, or **Cancel** to return without saving.

To edit a notification, click the **Edit** link in the Event Administration screen. Notifications can also be copied and deleted like events.

ADVANCED TOPIC – PRELOADING CALENDAR SEARCH OPTIONS

The Event Calendar module can be called with a number of search options pre-loaded. For example, you might want to highlight upcoming events in the New York metro area, or upcoming training classes, or events put on by a specific chapter or district.

When you create a link from a page to the calendar, you can reference the built-in module directly. But to use this feature, you need to link to the calendar using an “External Link”, similar to the following:

http://democlub.clubexpress.com/content.aspx?page_id=2&club_id=245449

where the first part of the URL will be your domain name and the club_id will be your ID (245449 references the demo club.) page_id=2 references the calendar.

The following options can be specified as part of the URL link to the calendar:

&ma=<metro area id> - use this option to pre-specify a metro area.

&ec=<event category id> - use this option to pre-specify a category.

&es=<subgroup id> - use this option to pre-specify a chapter or district.

The angle brackets are not specified. In place of these, use the relevant ID values, which you will find on the metro area, event category and subgroup administration screens.

For example, appending &ec=25 to the URL will pre-load the demo club’s calendar with events for the Chicago metro area.

[...content.aspx?page_id=2&club_id=245449&ma=25](http://democlub.clubexpress.com/content.aspx?page_id=2&club_id=245449&ma=25)

You can also combine options:

[...content.aspx?page_id=2&club_id=245449&ma=25&ec=16](http://democlub.clubexpress.com/content.aspx?page_id=2&club_id=245449&ma=25&ec=16)

will pre-load the demo club’s calendar with education and training meetings in the Chicago metro area.

Chapter 25 – Modules – Contact Us

INTRODUCTION

The Contact Us screen is shown below:

Home • Contact Admin

Contact Us

This page shows a number of ways that you can contact us, including our mailing address and contact information. If you would like to send us an email, please complete the form at the bottom of the page and click the "Send" button.

If you have questions about ClubExpress or a transaction on your credit card statement, please call ClubExpress Technical Support toll-free at 1-866-HLP-CLUB (457-2582), or, if outside the US, (847) 255-0210.

Mailing Address 5005 Newport Drive, Suite 203
Rolling Meadows , IL 60008

Phone Number 866-457-2582

Association Contacts

President	Barry Bonds		dan@clubexpress.com
President	Doug Burgett	770-111-1114	doug@home.com
VP Finances	Michael Droz		
VP Safety	Martin D Smith	866-457-2582	

Email

* Your Name

* Your Email Address

* Send To

* Subject

* Text

"/>
"/>

Figure 25.1 – Contact Us

The Contact Us module provides a standard way for members and visitors to contact a club. By default, it includes the following information:

- The club's mailing address

- The club's listed main phone no.
- The club's listed fax no.
- Club officers, based on the contacts flagged to be included on the Contact Us page. Names and positions are shown, and optionally, phone numbers and email addresses. (See page 180 for more information.)
- An email form for contacting officers. The **Send To** drop-down field lists each officer as well as the club's general email address.

UPDATING CONTACTS

There are two ways to edit contacts:

1. Select **Control Panel – Contacts** from the menu.
2. Click the red **Admin** link in the top right corner of the Contacts page.

You will see Contacts Admin page, described on page 180. Contacts are displayed on the contacts page because you have checked the "Show on Contacts" option.

Before defining contacts, you should define the titles that these contacts will hold. This is done on the **Control Panel – Titles** screen.

Chapter 26 – Modules – Member Signup / Renewal

INTRODUCTION

The Member Signup module is a wizard with between three and nine pages. There are four versions of this wizard:

- For new members signing themselves up. This module is enabled in the standard way and is placed on the public side of the club's website, usually on the menu. It can also be activated from the Benefits module.
- For admins, accessed by clicking the **Add Member** button in the Member Manager. This version handles memberships that arrive in the mail or that are handed in at an event.
- For existing members in the Renew cycle who click the **Renew Now** link in their Login panel, or the **Renew** link on their Profile screen.
- For admins who click the **Renew** link beside a member's name in the Member Manager.

The table on the following page lists the wizard pages in sequence, whether each page is optional or required, and which versions of the wizard it appears in. Specific pages are controlled using the **Control Panel – Membership Wizards Setup** screen.

Page	Member	Administrator
1. Member Type	Required for both new memberships and renewals.	
2. Contact Information	Required for new memberships; optional for renewals.	
3. Additional Member Data	Additional Member Data (questions) must exist and be enabled for the membership application, for this page to appear. The questions must also be associated with the member type selected by the user.	
4. Interests	The Interests module must be enabled, with visibility set for any website visitor.	
5. Chapters and/or Secondary and/or Tertiary Members	Chapters must be enabled for this page to appear with chapter options. The “Additional Members” selection depends on the member type.	
6. Username and Password	Required for new members, who will specify their own username and password. Not shown for renewing members.	Not shown for new members. The system generates and emails the member a temporary username and password. Not shown for renewing members.
7. Additional Charges	Displayed if enabled and if any additional charges are defined	
8. Joining Agreement	Displayed for new and renewing members if enabled. A joining agreement must be defined.	Not shown for new or renewing members. If members are signing up or renewing using a printed form, they are assumed to have “signed” an agreement already.
9. Summary Page	Required	
Payment Page	Will be displayed if the membership fee > 0, and if the “Board approval” option is NOT enabled.	

1. MEMBER TYPE

The screenshot shows a web browser window titled "Home • New Member Sign Up". The page header is "Member Sign Up" with "Step 1 of 9" on the right. A text box contains instructions: "Select the type of membership that you are signing up for. Note that some membership types may have eligibility requirements which you must meet in order to sign up using that type. Then click the 'Next' button at the bottom of the page to continue to the next step. You can also press the 'Back' button to return to a previous step if you need to update information already entered." Below this is a "Membership Type" dropdown menu with "Family" selected. A small icon is to the right of the dropdown. Text below the dropdown reads "Up to two adults and up to 3 children under 18." A separate text box contains the note "This membership type includes one or more spouse & child members". Below that, "Expiration Date 11/15/2010" is displayed. On the right side, "Current Total 375.00" is shown. At the bottom, there are "Cancel X" and "Next >" buttons.

Figure 26.1 – Member Signup/Renewal – Member Type

When a new member steps through this signup wizard, only member types that are flagged to be visible to the public are shown in the drop-down.

When an administrator steps through this signup wizard, all member types are shown in the drop-down, allowing you to select types that are only available under special circumstances.

2. BASIC CONTACT INFORMATION

Home • [Member Profile](#) • [New Member Sign Up](#) ?

Member Sign Up
Step 2 of 9

The following pages collect the information needed for your membership. Please complete each page as accurately as possible. Required fields are marked with an asterisk. Please note that, in accordance with the Privacy Policy, your email address will not be sold or distributed to anyone. When you have finished with this page, click the "Next" button.

Already a member? [Click here](#) to login and renew your membership.

Salutation [Select](#)

First Name *

Middle Initial

Last Name *

Nickname

Spouse First Name

Spouse Last Name

Sponsor *

Address Line 1 *

Address Line 2

City *

State/Province ▼

Zip/Postal Code *

Country ▼ [Show All Countries](#)

Home Phone *

Cell Phone

Fax

Email Address *

Uncheck this box to stop receiving general information emails from your club. Note that this setting does not affect discussion forum emails, or system generated emails such as renewal notices and transaction confirmation messages.

Website

Work Information

Company

Occupation/Title

Phone

Toll Free Phone

Figure 26.2a – Member Signup/Renewal – Basic Contact Info – Personal ver.

A different version of this page, designed for organizations with company or business memberships, is also available and shown below. An option on the **Control Panel – Membership Options** screen allows you to select which version to use.

Home • New Member Sign Up ?

Member Sign Up
Step 2 of 9

The following pages collect the information needed for your membership. Please complete each page as accurately as possible. Required fields are marked with an asterisk. Please note that, in accordance with the Privacy Policy, your email address will not be sold or distributed to anyone. When you have finished with this page, click the "Next" button.

⚠ **Already a member? [Click here](#) to login and renew your membership.**

Member Information

Salutation [Select](#)

First Name *

Middle Initial

Last Name *

Nickname

Spouse First Name

Spouse Last Name

Cell Phone

Email Address *

Uncheck this box to stop receiving general information emails from your club. Note that this setting does not affect discussion forum emails, or system generated emails such as renewal notices and transaction confirmation messages.

Sponsor *

Company / Primary Address

Company

Occupation/Title

Address Line 1 *

Address Line 2

City *

State/Province ▼

Zip/Postal Code *

Country ▼ [Show All Countries](#)

Phone *

Toll Free Phone

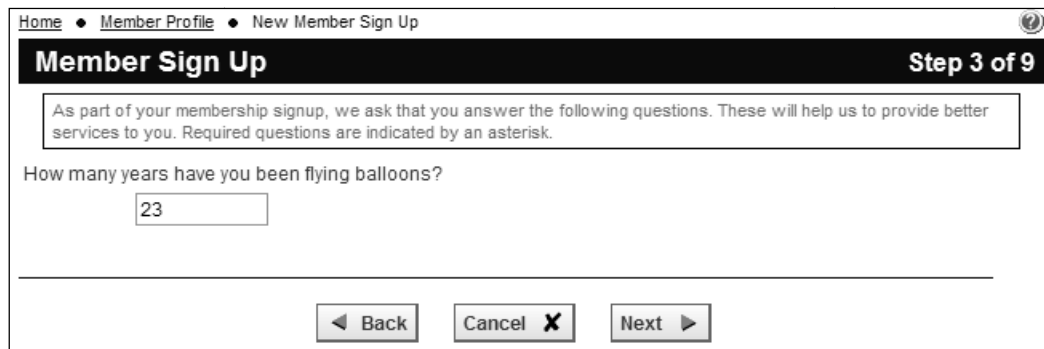
Fax

Website

Figure 26.2b – Member Signup/Renewal – Basic Contact Info – Business ver.

On both versions of the page, when the user clicks the **Next** button, you can configure the system to check if that email address and first name are already in the system. If they are, the system will cancel the signup process and take the member to the Login page so that he or she can login to the existing membership instead of creating a new one.

3. ADDITIONAL MEMBER DATA



Home • Member Profile • New Member Sign Up

Member Sign Up Step 3 of 9

As part of your membership signup, we ask that you answer the following questions. These will help us to provide better services to you. Required questions are indicated by an asterisk.

How many years have you been flying balloons?

Figure 26.3 – Member Signup/Renewal – Additional Member Data

Some clubs and associations require members to answer specific questions as part of the membership application. ClubExpress allows you to configure questions by following these steps:

1. Login in as an Administrator;
2. Select **Control Panel** from the menu;
3. Select **Additional Member Data** in the Membership section.

For more information on configuring Additional Member Data, see page **Error! Bookmark not defined.**

4. MEMBER INTERESTS

The screenshot shows a web browser window with the following content:

- Navigation: Home • Member Profile • New Member Sign Up
- Section Header: **Member Sign Up**
- Instruction: Select the interests in which you would like to participate.
- Maintenance**
 - Maintaining and preparing balloons and associated equipment for the flying season
 - Burners**
Maintaining the gas burners, including storage tanks, pipes, jets, controls, gauges and other equipment
 - Envelope**
Maintaining and repairing the balloon envelope, including vents, lines and control surfaces
 - Baskets**
Maintaining baskets, including lines, safety harnesses, weights and other passenger elements
 - Support Equipment**
Everything but the basket, burner or envelope
- Safety**
 - Teaching and reinforcing the important safety considerations in our hobby
 - Safety Education and Inspection**
We support the club's vital safety activities, ensuring that every balloon is fully inspected and certified before lift-off. We also help with safety education, within the club and general community.
- Social Committee**
 - Fellowship
- Link: [Uncheck All](#)
- Buttons:

Figure 26.4 – Member Signup/Renewal – Member Interests

If the Interests module is defined, you can optionally configure the Profile – Interests screen to also appear in the Member Signup Wizard. This is done on the **Control Panel – Membership Wizard Setup**.

5. CHAPTERS AND/OR SECONDARY AND/OR TERTIARY MEMBERS

If your club or association allows members to join one or more chapters, or if the selected membership type is a family or business type which includes secondary and/or tertiary members, the following screen will be displayed. There are multiple versions of this screen depending on which of the above options is enabled (the example below assumes all options.)

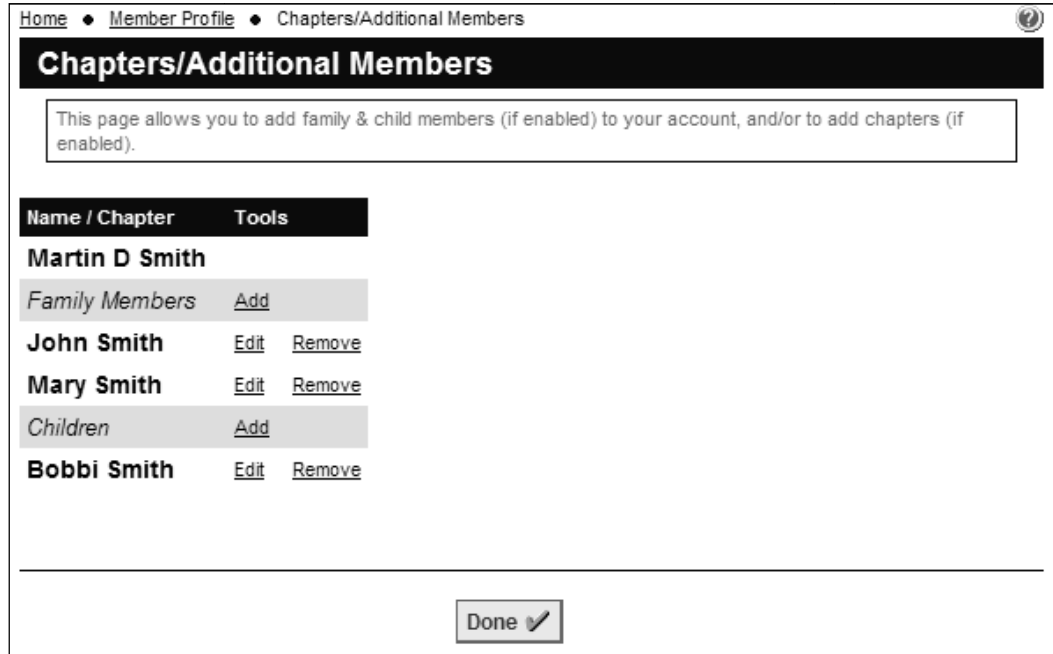


Figure 26.5 – Member Signup/Renewal – Defining sec./tert. members

If the selected member type allows members to include one or more secondary and/or tertiary members, they will see sections for these members using the club's chosen keywords for a secondary and a tertiary member. Use the **Add** link to add members. The system will display either a brief screen collecting basic information only or a longer screen collecting more detailed information, based on the options in the Membership Options screen.

https://democlub.clubexpress.com/?page_id=3...

Add Child

Specify the name and other information for this additional member attached to your account. Click "Save" to save your changes and return to the list of additional members, or "Cancel" to return without saving.

First Name

Last Name

Birthday

Gender Female Male

Figure 26.6 – Sample brief data entry screen for secondary/tertiary members

https://democlub.clubexpress.com/?page_id=399&club...

Add Child

Specify the name and contact information for this additional member attached to your account. Click "Save" to save your changes and return to the list of additional members, or "Cancel" to return without saving.

Salutation [Select](#)

First Name

Last Name

Address

City

State/Province

Zip/Postal Code

Country [Show All Countries](#)

Email

Phone

Cell Phone

Company

Title

Birthday

Gender Female Male

Figure 26.7 – Longer data entry screen for secondary/tertiary members

The **Add** link will disappear when the maximum number of members has been added. Use the **Remove** link to remove a secondary or tertiary member.

If your club or association supports chapters, you will see an **Add Chapter** link. Click it to add one or more chapters, based on the Member Type settings for how many chapters each member can belong to. If secondary and tertiary members belong to the same chapter(s) as the primary member, this information is filled in automatically. If not, you can select chapters separately for each member.

Home • Control Panel • Member Manager • Member Profile • Chapters/Additional Members

Chapters/Additional Members for Eric Abrams

This page allows you to add family & child members (if enabled) to your account, and/or to add chapters (if enabled).

Name / Chapter	Tools
Eric M Abrams	
Chicago	Remove
<i>Family Members</i>	Add
Callie Abrams	Edit Remove
Chicago	Remove
Lisa Abrams	Edit Add Chapter Remove

[Done](#) ✓

Figure 26.8 – Defining chapter assignments and secondary/tertiary members

6. USER ID AND PASSWORD

Home • New Member Sign Up

Member Sign Up Step 6 of 9

Some areas of our web site are only available to members. Your username and password are used to log into the site so that you can access these features. The name you choose must be unique within the club.

When you have finished with this screen, click the "Next" button at the bottom of the page. You can also click the "Back" button to return to a previous step if you need to update information already entered.

Create a user name and password to use on this site.
The following name is being suggested as your user name; you may change it if you like.

User Name ◆

Password ◆

Re-enter Password ◆

Passwords should be from 5 - 10 characters long and may only include letters, numbers and the underscore character.

◀ Back Cancel ✕ Next ▶

Figure 26.9 – Member Signup/Renewal – User ID and Password

This screen is always shown in the member version of the wizard for new members.

It is also not shown on the administrator version of the wizard for new members. Instead, the system generates a temporary username and password and sends them to the member as part of the welcome email. When new members first log in, they are first taken to the **Profile – Username / Password** screen where they can change both to something that is easier to remember.

It is not shown for renewing members.

7. ADDITIONAL CHARGES

Home • New Member Sign Up ?

Member Sign Up Step 7 of 9

This screen allows you to sign up for additional charges and membership options. Some charges may allow you to change the default fee. Click the "Next" button to continue to the next step or the "Back" button to change information previously entered.

Additional Charge Item	Quantity	Price	Total Price
<input checked="" type="checkbox"/> Annual Racing Fee	N/A	30.00	30.00
<input type="checkbox"/> Printed Newsletter <small>Add this charge if you would like a printed copy of our monthly newsletter. Otherwise, you will receive an email when the electronic copy is ready to be downloaded.</small>	N/A	10.00	
<input type="checkbox"/> Season Ticket Pass <small>Season Ticket pass to all home games. Finals are not included.</small>	<input type="text"/>	25.00	
<input type="checkbox"/> T-Shirt	<input type="text"/>	9.00	
<input type="checkbox"/> Team Pictures <small>1 8x10 team picture</small>	N/A	12.00	
<input type="checkbox"/> Donation <small>Are you willing to make an additional donation to help club activities?</small>	N/A	\$ <input type="text"/>	
<input type="checkbox"/> Club Key Fob <small>A engraved key fob showing the club logo</small>	<input type="text"/>	11.00	
<input type="checkbox"/> test bill	<input type="text"/>	50.00	
<input checked="" type="checkbox"/> Application Fee	N/A	25.00	25.00
<input type="checkbox"/> Bar Tab	N/A	0.00	
<input checked="" type="checkbox"/> Building Restoration Fee	N/A	100.00	100.00
<input type="checkbox"/> Small Mooring Fee	<input type="text"/>	540.00	
<input type="checkbox"/> Large Mooring Fee <small>(Please use Quantity field to enter the length of your vessel)</small>	<input type="text"/>	54.00	
<input type="checkbox"/> mug <small>coffee cup</small>	<input type="text"/>	5.00	
Total Additional Charges			\$ 155.00
Current Total \$ 530.00			

Figure 26.10 – Member Signup/Renewal – Additional Charges

This is an optional page. The actual page layout will vary based on the charges that you configure. For more information on defining Additional Charges, see page 125.

8. JOINING AGREEMENT

The screenshot shows a web browser window titled "Home • New Member Sign Up". The page header is "Member Sign Up" with "Step 8 of 9" on the right. A text box contains instructions: "Click the 'I Agree' check box at the bottom of this page to indicate that you agree to the following terms of membership. Then click the 'Next' button at the bottom of the page. You can also click the 'Back' button to return to a previous step if you need to update information already entered." Below this, the text reads: "Our club is involved in activities which entail a **high degree of skill and personal risk of injury**. When you join, you agree that Northwestern Balloon Club or its officers will not be held liable for any injuries you suffer while participating in a club activity." There is a line of placeholder text: "TFox paragraph sdfsd fsdfsdfsdfs". At the bottom center is a checked checkbox labeled "I Agree". At the very bottom are three buttons: "Back", "Cancel X", and "Next".

Figure 26.11 – Membership Signup/Renewal – Joining Agreement

Some organizations require members to view and “sign” a special agreement. This is usually a release of liability, for groups that offer dangerous activities to their members (for example, climbing, scuba diving, mountain biking or skiing clubs.) It might also be a code of ethics for clubs that require members to be in good standing within the community.

Follow these steps to define this text:

1. Login in as an Administrator;
2. Select **Control Panel** from the menu;
3. Select **Joining Agreement**. A popup window will be displayed.
4. Enter the text from your paper sign-up form and click **Save**.

To define visibility, go to **Control Panel – Membership Wizard Setup**.

Note that this screen is not shown on the administrator versions of the signup and renewal wizards. If a new member joined at an event or through the mail, the system assumes that the joining agreement was signed on paper.

9. SUMMARY

Home • New Member Sign Up ?

Member Sign Up
Step 9 of 9

Thank you for your interest in Northwestern Balloon Club. Please review the information below, and then click the "Finish and Proceed to Payment" button to process your new membership and proceed to the payment page. You can also click "Back" to modify information previously entered, or "Cancel" to cancel your new membership.

Personal Information

Member Name Martin Smith
 Address 5005 Newport Drive
 Apt. 203
 Rolling Meadows, IL 60008 (USA)
 Telephone 847-255-0210
 224-558-6348 (cell)
 Email Address info@clubexpress.com

Membership Summary

Membership Type Family
 Expiration Date 11/15/2010

Detail of Charges

Item	Qty	Price	Ext. Price
Membership (Family)	1	375.00	375.00
Annual Racing Fee	1	30.00	30.00
Application Fee	1	25.00	25.00
Building Restoration Fee	1	100.00	100.00

Total Charge \$ 530.00

Figure 26.12 – Member Signup/Renewal – Summary

Note that if the Nominate / Approve option is enabled (see page 128), the process ends with this screen. Instead of the **Finish and Proceed to Payment** button, there is a **Submit Application** button. The member is added to the database with a status of Prospective, ready to be reviewed by the Board of Directors. You then use the member status dialog to Accept, Decline or Drop the prospective member.

Also note that if there is no charge for the membership, the **Finish and Proceed to Payment** button is replaced by a **Done** button.

Administrators stepping through the member signup wizard will see an additional option on this last page: **Send new member emails**. It is checked by default and a welcome email is sent to the new member, including a temporary username and password to login. If you want to suppress this email so that new members are not notified that an account has been created for them, uncheck the box.



10. PENDING PAYMENT

Home • Control Panel • Pending Payments • Make Payment


Make Payment for dan j nitzel (89)

The list below shows outstanding payments due for the current member. Use the checkboxes to select which payments to make. Then, make a choice in the "Select Payment Method" dropdown list. If paying by credit card, enter the required information, and press the "Submit Payment" button. Please allow a minute or so for the transaction to complete.

If paying by check, enter the check number and adjust the payment date if necessary. Press the "Submit Payment" button.

Fields marked  require an entry. Click  to change amount.

[Print Invoice](#)

Sign Up (12/17/2005) Due \$ 55.00 Pay \$ **55.00** 

Adult	30.00
Season Ticket Pass	25.00
Transaction Total:	55.00

Total Selected For Payment

Select Payment Method

Review the payments due, and select the items you wish to pay for now. Then, select a payment type and follow the instructions provided.

Refund Policy: The refund policy is set by Northwestern Balloon Club. Refund requests must be directed to Northwestern Balloon Club - they cannot be handled by ClubExpress.

Figure 26.13 – Membership Signup/Renewal – Pending Payments

The payment options are different depending on who is displaying this screen.

- Members see just credit card and check options. Clubs also have the option of disabling either check or credit card payments.
- Administrators see additional options for cash, waiving the payment, and a credit card processed separately from ClubExpress.
- Here at ClubExpress, we see two more options, for checks payable to the club or to us and mailed to us instead of the club. There is an additional fee if you want us to process these checks.

(For more information on these options, see Chapter 10.)

When credit card is specified as the payment method, the screen is refreshed to show the following options:

Select Payment Method Credit Card Processed Through ClubExpress

Do you want us to retain your credit card information on file? Yes No
If you choose No, you will need to re-enter it for each transaction. Credit cards and other confidential information are fully encrypted when stored in our system.

There is no credit card on file. Please specify the information below.

Credit Card Type < Select Card Type >

Card Number

Expiration < Select Month > < Select Year >

Name on Card

Validation Code [How do I find this?](#)

This is the address we have on file for you. If it is not correct for this credit card, please change it for this transaction. If you elect to have us retain your credit card info, this is the address which will be saved.

Address

City

State/Province Illinois

Zip/Postal Code

Country UNITED STATES

IMPORTANT NOTE:

When you pay by credit card, the charge on your credit card statement will appear as **"ClubExpress"**.

If you have any questions, please contact your membership director, or contact ClubExpress directly at 1-866-HLP-CLUB (457-2582).

By checking this box, I authorize ClubExpress to charge my credit card for the items selected above on behalf of Northwestern Balloon Club.

Figure 26.14 – Payment by credit card

The system displays the credit card fields and the address stored with the member's record. If the card is registered to a different address, the member can change the address. Members also have the option of storing the card with their record so that they don't need to enter it each time. (It is fully encrypted using the most secure Internet standards.)

In the member version of this screen, there is also a statement that ClubExpress will process the credit card. Members are asked to authorize us to bill their card on behalf of their club or association. (If your club has its own merchant account, this notice is not shown.)

When **Print Invoice and Send Check** is selected as the payment option, the screen refreshes as follows:

Home ♦ Member Profile ♦ Pending Payments

Pending Payments

The list below shows outstanding payments due. Use the checkboxes to select which payments you wish to make. Then, make a choice in the "Select Payment Method" dropdown list. If you elect to pay by credit card, enter the required information, and press the "Submit Payment" button. Please allow a minute or so for your transaction to complete.

If you prefer to pay by check, select the "Print Invoice and Send Check" option and press the button with the same name. A printable version of the page will be displayed which includes instructions on how to make out your check and where to mail it.

<input checked="" type="checkbox"/>	Sign Up		\$ 81.00
	<i>Couple</i>	1 @ 50.00 =	50.00
	<i>Printed Newsletter</i>	1 @ 20.00 =	20.00
	<i>Club Key Fob</i>	1 @ 11.00 =	11.00

Total Due \$ 81.00

Total Selected \$ 81.00 ◀ Please make out your check in this amount.

Select Payment Method

Make check payable to: Northwestern Balloon Club, LLC

Mail check to: Northwestern Balloon Club, LLC
5005 Newport Drive, Suite 203
Rolling Meadows, IL 60008

Figure 26.15 – Payment by check

Clubs have the ability to customize the “Payable To” and mailing fields. Please contact us if you wish to specify different options for these fields.

When users click the **Print Invoice and Send Check** button, a popup window appears with the same information shown above, but without the page header, menu and other graphic elements. A print dialog will also appear allowing to you to select a local printer.

After printing, close the popup window. The two buttons shown above are replaced with a **Done** button.

Chapter 27 – Modules – Membership Directory

INTRODUCTION

ClubExpress provides an online member directory, allowing members to locate and contact other members. This module is usually placed on the members-only side of the website, so that confidential and personal information is only made available to organization members.

Selecting this choice from the menu displays a screen similar to the following:

Home • Membership Directory

Membership Directory

The Member Directory allows you to view other members. (Note that your own directory information can be updated by clicking the Profile link.) Begin by specifying a search value and clicking the "Search" button. The system will display matching members. If no search value is specified, all members will be displayed. If there are more than 30 matching items, use the Paging controls to see additional pages. Click "View" to see the bio for that member. (If there is no link by the member's name, that member has chosen not to display a bio. Note that members can also choose to completely remove their names from this list.)

Search For Members

Search By Last Name First Name City State/Province Country
 Zip Company Interests Recent Member Organizational Tree

Search For

Search Results (3 members found) Page 1 of 1

Name	Company	City	State	Zip	Bio
Jessica Smith		Chicago	IL	60601	
John Smith	None	Chicago	IL	60601	
Martin D Smith	Verizon	Chicago	IL	60601	<input type="button" value="View"/>

Figure 27.1 – Member Directory List

To find a member, select the field to search on, then enter a value and click **Search**. You can optionally include Trial members by checking the box. The list of matching members will be displayed under the Current Membership heading, sorted by the search field. Use the **Recent Member** Option to find members who have joined in the past 10, 30, 60 or 90 days. If no search value is entered, clicking **Search** displays the whole membership.

Note that if your club or association does not support chapters, the "Organizational Tree" option will not be shown in the "Search By" section above.

Members are displayed in pages of 30 members at a time. Click the **Prev** and **Next** buttons or the drop-down list to select a specific page. To view the membership directory entry for a member, click the **View** button. A screen similar to the following will be displayed:

The screenshot shows a web browser window with the following content:

- Navigation: Home • Membership Directory • Martin D Smith
- Section Header: **Membership Directory**
- Member Name: **Martin D Smith (smithy)** with an [Edit](#) link.
- Profile Picture: A photo of Martin D Smith.
- Company: A field labeled "Company" with an [Edit](#) link.
- Bio: "I've been a ballooning fan ever since I saw my first hot air balloon floating over the campground on my summer family vacation when I was 6 years old. One of my best memories was of another summer vacation a few years later in Arizona, when my dad and I rode on a hot air balloon." with an [Edit](#) link.
- Text: "I joined the club 15 years ago at age 25, serving as crew and line holder for other members. In my early 30's I bought an old balloon and spent the winter stripwhy is this here?ping it down and reconditioning everything. The next summer was my first flying my own rig. My newest balloon is only three years old, bright green with yellow stripes."
- Text: "In addition to all this, we now have the ability to upload information such as documents, JPG files, and others. This will really assist me in getting the site up to date and keeping it there. Hopefully the club members will feel the same."
- Social Media Links: [What is this?](#), [LinkedIn](#), [twitter](#), [facebook](#), [myspace.com](#) (a place for friends).
- Photos: [Summer Fly-in 2009](#)
- Contact Information:
 - Email Address: support@clubexpress.com
 - Office Phone: 866-457-2582
 - Fax: 847-255-0273
- Company Address: 5005 Newport Drive, Suite 203, Rolling Meadows, IL 60009
- Years Flying: 12 with an [Edit](#) link.
- Chapters: Chicago
- Buttons: [Return to Previous Page](#)

Figure 27.2 – Member Directory Detail

The information shown on this screen will vary based on the Visibility level chosen by the member. Individual members who have specified not to be listed in the directory will not be shown. However, if you are an Admin, the visibility settings are ignored and all members will be visible with a **View** button.

There are two versions of this screen, one for clubs where members join as part of their personal lives and one where members join as part of their business or professional lives. The appropriate version can be selected on the **Control Panel – Membership Options** screen.

Some clubs may also have custom versions of this module and screen, showing different fields and/or a different layout.

vCard Link



What is this?

Below the member's photo is an icon that allows you to add this person to the personal address book on your computer. This feature uses another Internet standard called a "vCard" file which is supported by most Personal Information Manager (PIM) programs, including Outlook, Eudora, Mozilla Thunderbird, Palm Desktop, Appleworks, Entourage, etc. When you click the icon, a standard dialog will be shown, asking if you want to Open or Save the file. Clicking Open creates a new contact record. You can also save the file to your local hard disk and share it with others, or open it at any time to create the contact record.

This feature is sensitive to the visibility settings chosen by the member; it will only include contact information that the member has chosen to show.

Social Networking Links

If the club has enabled social networking links, and the member has configured their profile information for any of these links, the appropriate logos will be displayed under the vCard link. Click a logo and a new window will open with that member's public profile on the appropriate service.

Photo Pages

If the club has enabled member-level photo pages, the system will place links to these photo pages under the social networking links. Click a page name to view the page.

Blogs

If the member authors one or more blogs on the club's website, you will see links for each blog.

Edit Links

When members view their own directory entry and when administrators view any entry, small **Edit** links are placed in each section of the bio. Clicking one of these links displays the appropriate page from that member's Profile, allowing immediate changes to be made and saved to the directory entry. Members can also click the photo to upload a new one, including a hi-res photo.

Click **Return to Previous Page** to go back to the listing screen.

Chapter 28 – Modules – Discussion Forums

INTRODUCTION

ClubExpress includes a powerful discussion forums module, allowing members to participate in online discussions on a variety of topics. Original messages and their replies are organized into threads that are listed within a forum. Forums in turn are grouped into categories, allowing a club or association to organize forums for different purposes.

Forums configured as an email list (“listserver”) push messages out to forum members’ email boxes and allow members to reply via email. The reply is posted to the forum and then sent back out to every forum member. But these forums can also viewed online like any other forum and are fully integrated into the rest of ClubExpress.

You have full control over forum membership. Forums can be defined where all members have access by default, or where members can opt-in, or where a moderator adds members manually. You can also build forums around an interest group, a committee or a member type, and ClubExpress will maintain forum membership automatically.

ClubExpress supports multiple views, message posting icons, forum handles, message attachments, user pictures, rich content within messages and many user-configurable options. There is also a full suite of administration tools at the forum, thread and message levels.

Forums can be configured to be moderated, where new messages must first be approved before they are made visible. Individual members can also be moderated so that only their messages must be approved. Administrators and moderators can also block members from posting completely if they are not following forum rules.

Forums can be placed on the public side of the club’s website, to make their content available to any site visitor. But in this position, they will be read-only; all editing functionality is disabled.

NAVIGATING FORUMS

The screenshot shows the 'Forums' section of a website. At the top, there are navigation links for 'Home' and 'Forums', and an 'Admin' link. Below this is a 'Forums' header with a 'Search' button and a link to 'Our Forums Policy'. The main content area is titled 'Public Forums' and contains a sub-header 'All public forums'. Below this is a table with four columns: 'Forum', 'Threads', 'Posts', and 'Last Post'. The table lists three forums: 'Safety', 'Equipment', and 'Official Club Business'. Each forum entry includes a brief description, the number of threads and posts, and the date and time of the last post. A blue diamond icon is next to the 'Last Post' for the 'Safety' forum.

Forum	Threads	Posts	Last Post
Safety Public Active This forum focuses on safe flying, including equipment maintenance, certifications, FAA regs, and what to do in an emergency	16	57	9/20/2007 5:33 PM ◆
Equipment Public Active This forum focuses on equipment, including what to buy for different skill levels and needs, how to assemble and how to maintain. Safety issues are handled in the safety forum	5	11	9/19/2007 9:54 PM
Official Club Business Public Active Anything to do with the operation of the club, including board meetings, finances, bylaws, facilities, etc.	5	12	7/11/2006 4:21 AM

Figure 28.1 – Forum categories and forums

This screen shows the forum categories and forums defined by your organization. Each forum includes a brief description of the forum’s purpose, the number of threads and posts in the forum and the date of the last post.

If messages were posted to forum since your last visit, a blue diamond in the **Last Post** column will be shown.

Next to a forum’s name is its blue Visibility setting (Public, Club Members Only or Forum Members Only) and its red Status setting (Active, Not Active, Locked or Archived). Admins will see these settings for ALL forums. Moderators and coordinators will only see visibility and status links for the forums they moderate/coordinate.

Click **Search** to search for specific messages. Click **Our Forums Policy** (if shown) to view the club’s policies for maintaining harmonious and smoothly-running forums. These options are described in more detail below.

Drilling into a Forum – Threads of Messages

Clicking the forum name displays a list of threads in the forum, as shown in the following screen:

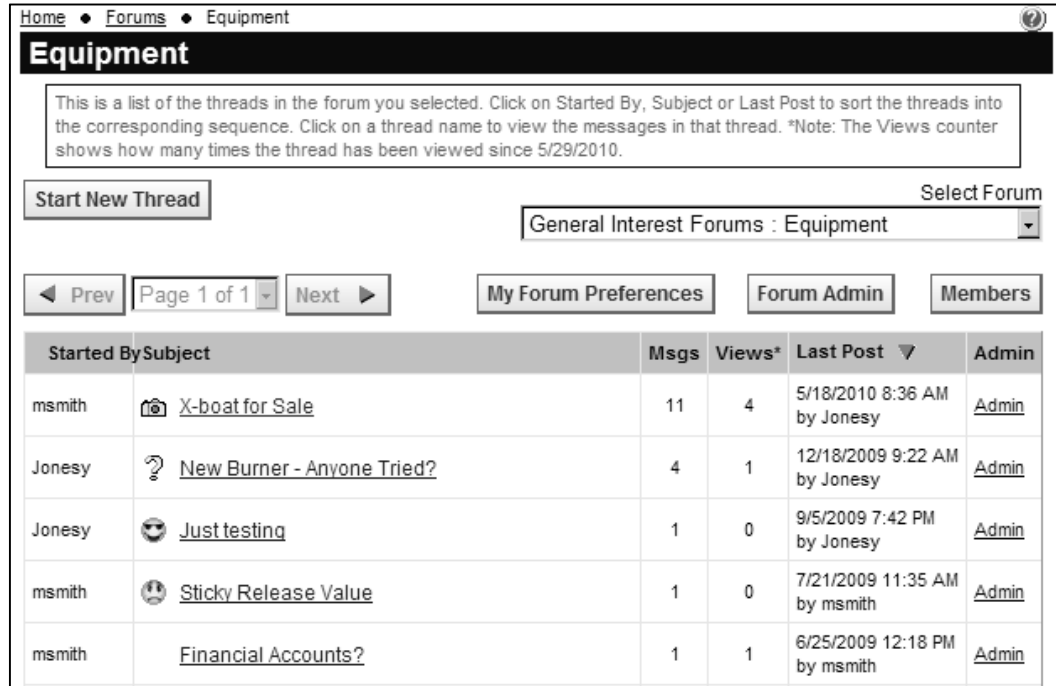


Figure 28.2 – Forum threads

Each row is a separate thread, showing the author of the first post, the thread subject, number of messages in the thread, the number of times the thread has been viewed (since 5/29/2010 when this feature was added), and the date and author of the most recent post. You can change the sort order by clicking the **Author**, **Subject** and **Last Post** headings. Clicking on a heading a second time changes the direction of the sort.

A thread can be “pinned” to the top of a forum so that it’s always visible. Pinned threads are shown with a different background color and a pin icon.

If messages were posted to a forum since your last visit, a blue diamond in the **Last Post** column will be shown.

If there are more threads in the forum than will fit on a single screen (based on the number of messages per screen configured in your profile), the **Prev**, **Next**, and paging controls will be active, allowing you to move to any page of threads.

To select a different forum, click the **Select Forum** drop-down in the top right corner. To start a new thread, click **Start New Thread** in the top left corner.

To modify your individual preferences for this forum, click the **My Forum Preferences** button. You will be taken to the preferences screen in your Profile, described in detail in Chapter 8.

If you’re configured as a Moderator of this forum, the **Members** button allows you to view and update “special” members in the forum, including those who are banned from posting in the forum and those whose messages must be moderated. See below for more details.

CREATING MESSAGES

Click the **Start New Thread** button to start a new thread. You will initially see the simple message editor, shown below.

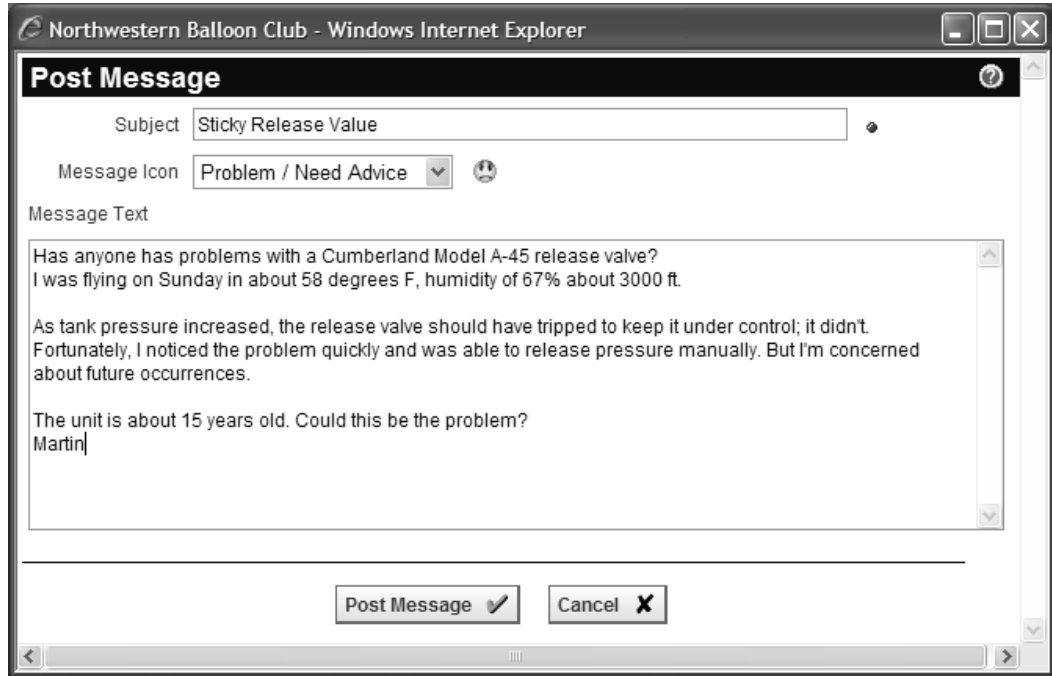


Figure 28.3 – Post Message – basic editor

Specify the subject and optionally, a message icon from the drop-down list (the icon is displayed beside the drop-down). Then enter the message text and click **Post Message**. The message will be added to the forum.

In your profile, you can also set an option to use the advanced content editor, described in detail in Chapter 16 – Content Editor. This editor provides support for fonts, attributes, tables, indenting, bullets, images, horizontal rules, etc.

If you are moderated in the forum or the forum as a whole is moderated, you will see this message displayed after you create and save the post:

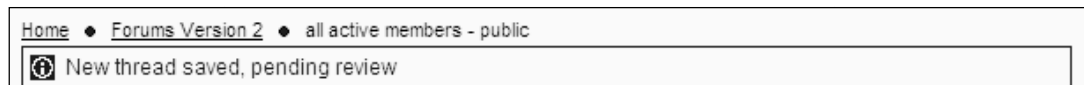


Figure 28.4 – Message if member or forum is Moderated

Adding Attachments to a Message



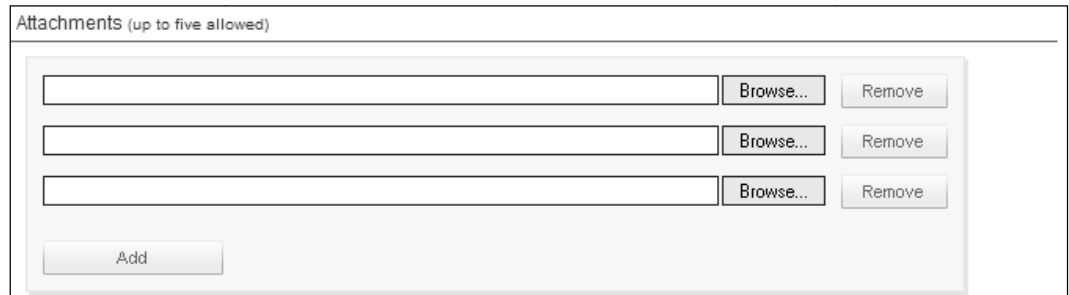
To add attachments, click the paperclip icon at the bottom of the window. The screen will refresh to show the following panel:



The screenshot shows a panel titled "Attachments (up to five allowed)". It contains a single text input field. To the right of the input field are two buttons: "Browse..." and "Remove". Below the input field is a button labeled "Add".

Figure 28.5 – Adding an attachment to a message

Click the **Browse** button and select a file from your computer or network. It will be added to the message. If you want to add another file, click the **Add** button to display another "Browse" field, as shown below.



The screenshot shows the same "Attachments (up to five allowed)" panel, but now it contains three text input fields stacked vertically. Each input field has a "Browse..." button to its right. To the right of the third input field is a "Remove" button. Below the input fields is a button labeled "Add".

Figure 28.6 – Adding multiple attachments to a message

You can attach up to 5 files to each message and the maximum size of each message, including attachments, is 2MB. If you want to remove a file, click the **Remove** button beside that filename.

When you post the message, the files are not physically attached. Instead, the message includes links back to each file. Clicking the link gives you the option of opening the file or saving it to your local hard disk. You must be connected to the Internet to view or save attachments.

VIEWING MESSAGES WITHIN A THREAD

In the Thread List screen, clicking a thread subject allows you to view the individual messages within the thread. There are two views, shown in the following two screens.

The screenshot shows a forum interface for 'Official Club Business'. The current thread is 'Upgrade facilities - more storage'. The main message is from msmith (Martin Smith) dated 9/20/2007 5:52 PM. It includes a bio, a message body, an 'Admin Reply' link, and two photo attachments. Below the message is a table listing other messages in the thread.

Author	Subject	Posted
DEhrmann	Upgrade facilities - more storage	6/4/2004 5:29 PM
Jonesy	re: Upgrade facilities - more storage	6/4/2004 5:32 PM
DEhrmann	re: Upgrade facilities - your architect friend	6/4/2004 6:00 PM
msmith	re: Upgrade facilities - more storage	9/20/2007 5:52 PM
msmith	re: Upgrade facilities - more storage	6/4/2004 5:34 PM
msmith	re: Upgrade facilities - more storage	6/4/2004 5:35 PM

Figure 28.7 – Thread: Thread View

“Thread View” shows the current message at the top of the screen with a thread list underneath showing the hierarchy of messages and replies. If the current message has attachments, they are listed below the body of the message. Clicking the link allows you to open or save the file.

In the tree, the current message is indicated with a red arrow in the Author column. New messages since your last visit are flagged with a blue diamond in the Posted column. Messages with attachments have a paperclip indicator in the Subject column. To view a different message in the thread, click the **Subject** heading in the tree view below the current message.

If the members who post a message have enabled this option, you can click their name to display their bio. This view respects the author’s pre-defined visibility settings. Administrators can click the **Status** link to display a popup with the members actual name and email address, as well as message handling options.

You can also view messages in “Flat View”, similar to the sample below:

Home • Forums • Official Club Business • Messages

Official Club Business: Upgrade facilities - more storage

◀ Prev Page 1 of 1 Next ▶ Return to Forum Switch To Threaded View


Author	Subject	Last Post ▼
▶ msmith	re: Upgrade facilities - more storage	9/20/2007 5:52 PM ◆
Martin Smith Chicago, IL	Here's a couple of photos of what the Nevada club does for their storage. I like the different compartments for each component.	
Admin	Regards, Marty	
	Attachment(s): Photo01.jpg (31.5 KB) Photo02.jpg (22.2 KB)	
DEhrmann	💡 re: Upgrade facilities - your architect friend	6/4/2004 6:00 PM
Admin Reply	Marty, your message reminded me of something I wanted to ask you. Do you think that Jeff would be able to give us an hour or so for some advice? We wouldn't be able to pay him now, but perhaps a couple of drinks and dinner would be suitable inducement???	
	Dan	
msmith	re: Upgrade facilities - more storage	6/4/2004 5:35 PM
Martin Smith Chicago, IL	Barb, I really like your vertical racks idea. Makes a lot of sense.	
Admin Reply	Marty	

Figure 28.8 – Thread: Flat View

This view shows every thread message fully expanded. You cannot see the hierarchy of messages, but it is easier to browse and read everything without having to continually click to a new message. New messages since your last visit are flagged with a blue diamond in the Posted column. Messages with attachments have an attachment section below the body of the message. Flat view can also be sorted by the same three fields as the thread view: Author, Subject and Post Date.

Both views have the same format for the message(s) shown:

Author's "handle" Status	Subject with post icon	Posting date and time
Author's name Author's city, state Author's photo	Message body	
Admin & Reply links	Attachment File List	

Note that authors can suppress display of their name, city, state and photo. Note also that the Admin link will only appear if you are a forum moderator or coordinator, or a club administrator.

For each view, users can separately configure the number of messages to show. If there are more messages than can be shown on one page, the **Prev**, **Next**, and paging controls will be active, allowing you to move to any page of messages within the current thread. To return to the list of forum threads, click the **Return to Forum** button in the top right corner.

Replying to a Message

Click the **Reply** link to reply to a specific message. You will see a screen similar to the following:

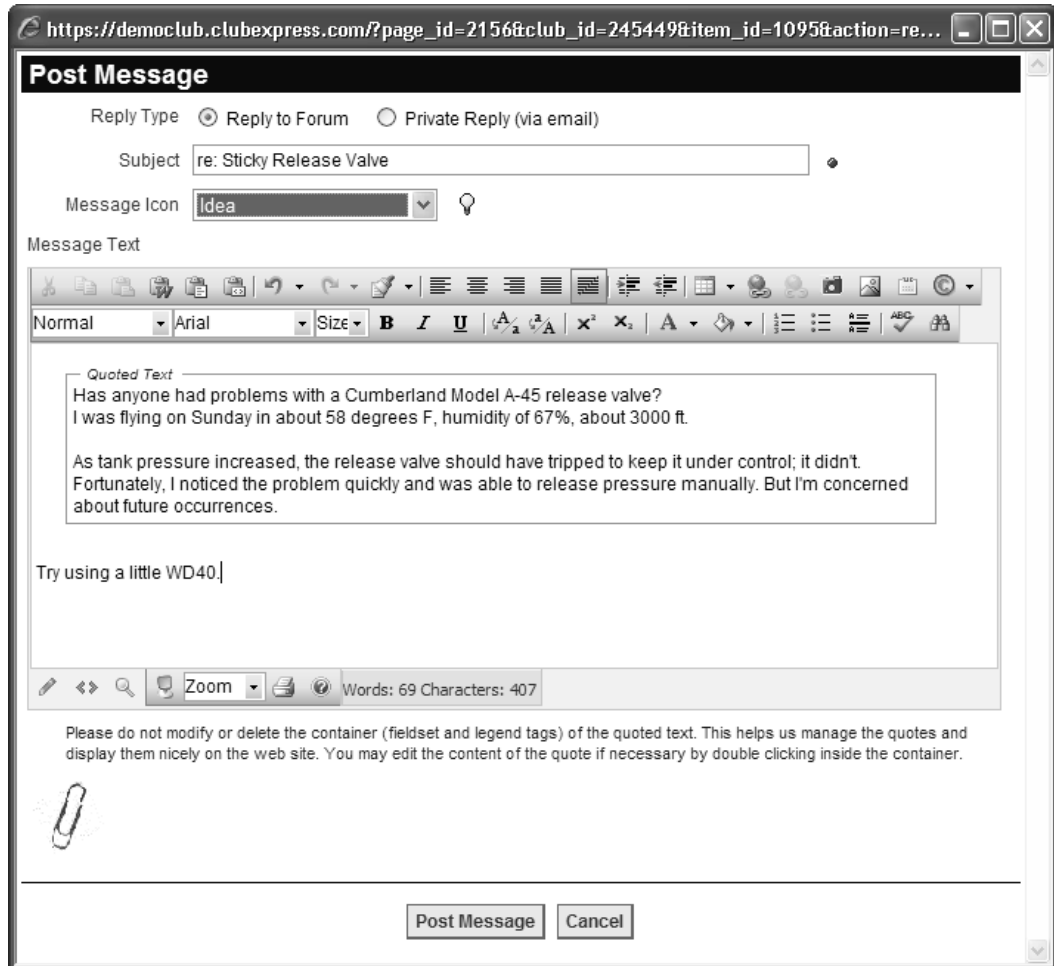


Figure 28.9 – Replying to a message

This screen displays either the basic message editor or the advanced content editor, depending on how your profile is configured.

If the sender of the message to which you are replying allows private replies, you will see a **Reply Type** option at the top of the screen. You can either reply as a public message to the forum or send a private reply via email.

If you click the Quote Previous Message link, the system inserts the contents of the message you are replying to, using a GroupBox control. You can edit the

quotation by double clicking inside the GroupBox, perhaps to remove parts of the reply that are not relevant to your comments. (Please do not modify or delete the container of the quoted text. This helps us manage the quotes and display them nicely in discussion forums.)

When you click **Post Message**, the message is saved and sent, either to the forum or, if you clicked “Private Reply”, as an email to the other member.

FORUM POSTING VIA EMAIL

In addition to posting a thread by clicking the **Start a Thread** button, forum members can start new threads by sending an email to the forum’s email address, if the forum has been set up to allow posting via email.

Forum members can also reply to messages sent from the forum via email. There is a footer included in each message that includes a link to the thread that the message belongs to.

To start a new thread via email, send an email to the email address of an active forum you are a member of (i.e. BuySell@myclub.com). Your email will create a thread. The title will be whatever you have entered in the Subject field of your email.

You can also reply to a forum message that you receive by email. Simply click the Reply button in your email software. Make sure you delete any extraneous text (other messages, footer information, etc.) before you send the email.

Important Notes: when you post a message to one or more forums via email, our server will look at all addresses in the To: and CC: fields to see if any match a forum that the server is managing. Unknown email addresses are ignored. In addition, the “From:” address will be verified against the forum’s membership list to ensure that you are allowed to post. You must send the message from the email account associated with your forum membership in order for the message to be posted into the forum.

If an incoming message has more than five attachments, it is posted with the first five, and a note is sent back to the sender that this was done. If a forum does not allow attachments and an incoming message has them, it is posted without its attachments, and a similar note is sent back to the sender.

The email list options, especially being able to send new messages to a forum via email or reply to existing messages by email, require that ClubExpress be hosting your club’s email accounts. If you currently have email for a domain pointing to a 3rd party email server, configuring this domain for a listserve will not work. But you can also buy a second domain (for example, “*MyClubForums.org*” for use just with discussion forums.)

MEMBER PROFILE

When discussion forums are available, a **Forums General Preferences** choice is added to the user Profile screen. This choice allows you to control your individual preferences for viewing messages and threads, authoring messages, and the personal information displayed.

A second choice, **Forum Memberships**, allows you to subscribe to forums (and unsubscribe as well) and to customize your preferences in each forum that you are a member of.

For more information, see Chapter 8 – Member Profile.

SEARCHING THROUGH MESSAGES

From the main Forum screen, click the **Search** button. The following screen is displayed:

Home • Forums • Forums Search

Forums Search

Search for messages by entering text in the "Search For" field, and pressing the "Search" button. Optionally you may select a specific forum to search. Note that no more than 20 messages will be returned.
Fields marked • require an entry.

Search For Messages

Search For

Select Forum Search

Figure 28.10 – Forum Search

Type in a word to search for, select the forum or leave it set to “All Forums”, and click **Search**. A screen similar to this will appear:

Home • Forums • Forums Search

Forums Search

Search for messages by entering text in the "Search For" field, and pressing the "Search" button. Optionally you may select a specific forum to search. Note that no more than 20 messages will be returned.
Fields marked • require an entry.

Search For Messages

Search For

Select Forum Search

Search Results (8 messages found)

Subject	Author	Posted
Power Lines	Jonesy	11/2/2004 5:32 PM
<i>I want to start a discussion about safety as it relates to flying near high-tension power lines, especially if your in the midst of a descent. What do people think?</i>		
re: Power Lines	msmith	11/2/2004 6:06 PM
<i>Wonderfull idea.</i>		

Figure 28.11 – Forum Search Results

The first 100 matches are shown. When you click the link in the Subject column, it will take you directly to that message. You can click **Return to Search** to go back to the search screen.

FORUM ADMINISTRATION

There are two ways to manage forums:

1. Administrators only can click the **Admin** link beside the Forums module in the Built-In Module Index screen.
2. When viewing the main Forums panel, coordinators and administrators can click the **Admin** link in the top right corner of the screen.

A screen similar to the following is displayed.

The screenshot shows the 'Forums Manager' interface. At the top, there are navigation links: Home, Forums, and Forums Manager. Below this is a title bar 'Forums Manager' and a help box with instructions: 'Use this screen to manage forums. Click the "Search" button to search for forums. You can also organize forums into categories for management purposes. Click "Add Forum" to create a new forum. You will see the properties screen which allows you to define general forum properties. Click "Special Members" to set options on members that apply to all forums. Click "Edit" to modify these properties for an existing forum. Click "Members" to view and set options on members of the specific forum. The other links in the Maintain column perform their expected functions.'

The main area contains a 'Search For Forums' section with the following controls:

- Title:
- Category:
- Status: Active Not Active Locked Archived
- Membership:
- Search:
- Configuration: (dropdown arrow)
- Add Forum:
- Special Members:
- Reports:

Below the search section is a 'Search Results' table:

Forum Title	Category	Status	Membership		Maintain
Buy / Sell / Trade	General Interest Forums	Active	Member Opt-In	(1)	Edit Members
Day Trips	General Interest Forums	Active	All Active Members	(35)	Edit Members
Engine maintenance	Private Forums	Active	All Active Members	(35)	Edit Members
Equipment	General Interest Forums	Active	All Active Members	(35)	Edit Members
Jobs	Job Postings	Active	All Active Members	(35)	Edit Members
Meeting Agenda	Private Forums	Active	Moderator Defined	(1)	Edit Members
Member Buy/Sell/Trade	General Interest Forums	Active	All Active Members	(35)	Edit Members
Official Club Business	General Interest Forums	Active	Committee Members	(3)	Edit Members

At the bottom of the interface is a 'Return to Previous Page' button.

Figure 28.12 – Forums Manager

The results grid shows the name, category, status, membership type and count of members for each forum.

If your club or association has many forums, the search panel can be used to limit the display. Enter a portion of the title, select a category, select one or more status values or a membership option and click **Search**. The meaning of each option is described in the following pages.

Configure – Forum Categories

Click the **Configure** button to see a popup menu with configuration options. Click **Forum Categories** to administer forum categories. You will see a screen similar to the following:

Home • Forums • Forums Manager • Forums Category Administration

Forums Category Administration

Forums are organized into categories which can be updated from this screen. Click "Add Category" to add a new category. Click "Edit" to change an existing category and its description. Click "Delete" to remove a category. Note that you cannot delete a category if one or more forums is associated with it. Click "Forum Sequence" to organize forums associated with the category in the desired order. Click "Category Sequence" to change the order in which forum categories appear.

[Add Category](#) [Category Sequence](#)

Category	Forums	Status	Maintain
General Interest Forums	11	Active	Edit Forum Sequence
Private Forums	5	Active	Edit Forum Sequence
Race Committee	1	Active	Edit
Job Postings	0	Active	Edit Delete

[Return to Previous Page](#)

Figure 28.13 – Forums Category Administration

This screen allows you to specify the categories into which forums are organized. Click the **Add Category** button to add a new category; the following popup dialog is displayed:

Northwestern Balloon Club, LLC. - Windows Internet Explorer

https://democlub.clubexpress.com/popup.aspx?page_id=2158&club_id=...

Add/Edit Category

Specify the forum category and a description if appropriate. Click "Save" or "Cancel" to return to the category list screen.

Category:

Description:

Max 500 characters - 500 characters left

Active

[Save](#) [Cancel](#)

Figure 28.14 – Add/Edit Category

Specify the name and description (up to 500 chars) of the forum category. You can also specify whether the category and the forums within the category are active. Click **Save** to save your changes and return to the list of categories, or **Cancel** to return without saving.

The **Category Sequence** button controls the order in which categories are shown.



Figure 28.15 – Forums Category Sequence

Click the **Edit** link to modify an existing category.

Click the **Forums Sequence** link to control the order in which individual forums are displayed within a category. You will see a similar sequence dialog, allowing you to modify the order in which forums are displayed within the category. (Forums are assigned to a category on the forum properties screen. Use the same screen to change the category to which a forum is assigned.)

Configure – Forums Policy

Select **Configure – Forums Policy** button to define your club’s global policies for forum behavior, message posting and replying. You will see the following popup dialog:

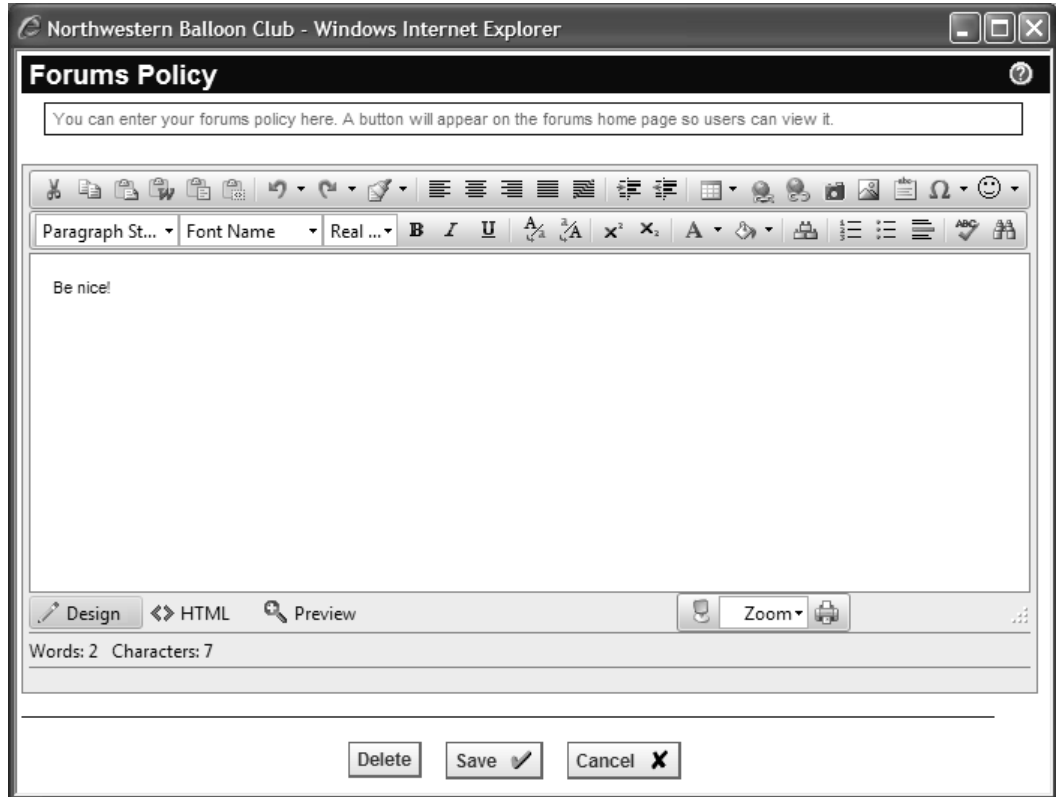


Figure 28.16 – Forums Policy

The advanced content editor allows you to define forum policies using the full range of formatting options. For more information on the editor, see Chapter 16.

Click **Delete** to delete an existing forums policy; click **Save** to save your changes; or click **Cancel** to exit without saving your changes.

If forum policies are defined, a new button – **Our Forums Policy** appears on the main forum screen, making it easy for members to view this policy before they start participating in forums.

Configure – Forum Defaults

Select **Configure – Forum Defaults** to update forum global options and defaults for each forum member. You will see the following screen:

Home • Forums • Forums Manager • Edit Forum Defaults

Forum Defaults

Start New Thread Text

This is the 'Start New Thread' text that will appear on the top and the bottom of each forum on which members may post.

Start a Thread Text ⌵

Forum Defaults

These are the default values that will be assigned to each new forum when it is started. You can change the values for each forum.

Visibility ⌵

Who Can Post All Forum Members
 Moderator Only

Posting Method Online Only
 Online and Via Email

File Attachments Allowed
 Not Allowed

Moderator Approval No - messages post immediately
 Yes - moderator approval required

Sending Emails Messages are sent to forum members via email
 Messages can be read online only

Forum Mode Discussion Forum Mode
NOTE: Emails are sent 'to' the member, and 'from' the forum - all replies are back to the forum.
 Listserver Mode
NOTE: Emails are sent 'to' the list, and 'from' the original message poster. Replies go to the forum or to the original poster.

Message Threading Strong
Strong threading uses a token added to the message subject so replies can be attached to their parent messages. This guarantees that message threads will be properly preserved (assuming that the subject token is not modified by the user). However, some users find this token distracting.
 Weak
Weak threading uses internal message headers to attach replies to their parent messages. Some email programs do not properly set these internal headers, defeating the message threading. When the headers are missing, the system will try to match the subject of the message to an existing thread.

Figure 28.17a – Forum Defaults (top part)

In the first section, specify the text to be used for the **Start New Thread** button. (Some users may not be familiar with the concept of a thread of messages; some clubs prefer to change this to “Post New Message” or something similar.)

In the next section, specify the defaults for each new forum created. Changing these values has no effect on existing forums. And each of these settings can be changed on the Forum Add/Edit screen. These options are described in more detail in the following section.

- The default visibility;
- Who can post to the forum;
- What posting methods are allowed;
- Whether file attachments are allowed;
- Whether moderator approval is required;
- Whether new messages are sent by email or posted online only;
- Which mode is used for the From:, To:, and Reply To: fields;
- Which threading model is used.

The Forum Defaults screen continues below.

Forum Member Defaults

These are the default values that will be assigned to each new forum member who does not have forum preferences specified and has not yet subscribed to a forum. The values can be changed by the member or by an administrator.

Allow Private Replies Allow forum members to reply directly to message posters via email

Send Email Send Forum Messages Via Email
NOTE: When this option is checked, members can control the sending of email for each forum individually from the "Forum Memberships" page. When un-checked, they will not receive emails from any of their forums, regardless of the individual settings.

Email Format Plain text in the body of the email
 Rich formatting in the body of the email

Frequency

Preferred Text Editor Simple - Text Only Advanced - With Formatting Tools

Message Signature Attach the member's signature to each message

Show Name Display member's full name with messages

Link to Bio Display a link to member's directory listing (bio) with messages

Show Location Display member's location with messages

Local Time Offset The current server date & time is 5/25/2010 4:44 PM.
Specify your offset time in hours (+/-).

Show Picture Display member's picture with messages

Figure 28.17b – Forum Defaults (bottom part)

In this section, specify the defaults for each forum member who is added to a forum. Changing these values has no effect on existing forum memberships. And

each of these settings can be changed in the member's Profile screen. These options are also described in more detail in the Member Profile chapter.

- Whether private replies via email are allowed;
- In forums which support email, whether members are subscribed;
- What format to use for emails;
- With what frequency emails should be sent;
- Which editor should be used to create messages;
- Whether the member's signature should be appended to each message;
- Whether the member's name should be shown;
- Whether a link to the member's bio should be shown;
- Whether the member's location should be shown;
- The default time offset to ensure correct message posting times;
- Whether the member's picture should be shown.

Click **Save** to save your changes and return to the Forums Manager or **Cancel** to return without saving.

ADD FORUM

When you click the **Add Forum** button the following popup dialog is displayed:

Home • Forums • Forums Manager • Add/Edit Forum

Add/Edit Forum

Specify the forum title (and a description if appropriate), as well as other information relevant to this forum. Click "Save" or "Cancel" to return to the forum manager screen.

General Info

Title

Description
Max 500 characters - 484 characters left

Category

Status

Membership (Member updates will be delayed)

Visibility

Posting Messages

Who Can Post All Forum Members
 Moderator Only ("Announcement" Forum)

Posting Method Online (Web Site) Only
 Online (Web Site) and Via Email
 Email Address @

File Attachments Allowed
 Not Allowed

Moderator Approval No - messages post immediately
 Yes - moderator approval required

Figure 28.18a – Add/Edit Forum – top part

Use this dialog to specify the name and configuration of the new forum. Each option is described in the following sections.

General Info Section

Title and Description

Specify the name of the forum and a description of its purpose (up to 500 chars.) Be as descriptive as possible so that members know which forums to use for their questions and discussion. Spellchecking is available.

Category

Specify the category in which this forum should appear. In Edit mode, this option allows you to move a forum to a different category.

Status

Forums have one of four status values:

Active	The forum is visible to members and admins, and open for people to post messages and replies
Locked	The forum is visible to members and admins, but messages and replies cannot be posted. This is a “read-only” forum.
Not Active	The forum is not visible to members but it is visible to administrators, coordinators and moderators. Messages and replies are not allowed.
Archived	The forum is not visible to anyone by default. For audit and liability reasons, ClubExpress does not allow you to delete forums. But you can archive them so that they are not normally shown.

Membership

The membership of a forum can be defined in a number of ways.

All Active Members	All active club members are automatically members of this forum. Note that members can individually opt out of participating from their Profile – Forum Memberships screen
Member Opt-in	This forum is shown to all active club members on their profile – Forum Memberships screen, and they have the option of opting in to participate in forum discussions.
Moderator Defined	A forum moderator, forums module coordinator or club administrator defines membership in these forums.

Interest Members	Forum membership is maintained automatically, based around an Interest group in the Interests module; if members are in the interest group, they will be in the forum. When this option is selected, a new field will appear allowing you to specify the interest group to which the forum should be linked.
Committee Members	Forum membership is maintained automatically, based around a committee in the Committees module; if members are in the committee, they will be in the forum. When this option is selected, a new field will appear allowing you to specify the committee to which the forum should be linked.
Member Type	Forum membership is maintained automatically, based around a membership type; if members have the specified type, they will be in the forum. When this option is selected, a new field will appear allowing you to specify the member type to which the forum should be linked.

Except for the “Member Opt-In” selection, all of these options put members into a forum without their consent. However, members must still activate themselves for each forum in order to participate. This is done on the **Profile – Forum Memberships** screen, described in Chapter 8.

Also note that forum memberships are not maintained in real time. When changes are made, there is slight queuing delay before the forum member list is updated. For example, if you create a forum based around a committee, you will need to wait a few minutes before the forum will be populated with the members of the committee. Similarly, if you add members to a committee or remove them from the committee, you must wait for a few minutes before posting a message to that forum in order for the forum member list to be updated.

Visibility

The visibility or “presence” of the forum can be defined in a number of ways:

Public	If the forums module is placed on the public side of the website (where it is read-only by default), anyone will see that this forum exists.
Club Members Only	If the forums module is placed on the public side of the website, this forum will not be visible. But any logged in member will see that this forum exists.
Forum Members Only	The existence of this forum is known only to those who are members of the forum (as well as club administrators and forum module coordinators.)

Posting Messages Section

Who Can Post

Select **All Forum Members** to allow anyone who’s a member of the forum to start threads and reply to messages. Select **Moderator Only** to block regular forum members from posting; only forum moderators (and module coordinators and full administrators) can post messages. This latter option is used for “announcement” forums.

Posting Method

Select **Online (Web Site) Only** to block posting by email. Forums members can only post new messages and replies through the website interface. Select **Online (Web Site) and Via Email** to allow posting online or by email. This option requires that the forum have an email address, which in turns requires that ClubExpress be handling at least one domain name for your club or association.

If the second option is selected, a new field appears to specify the email address for the forum. You must also select one of the domain names being handled by ClubExpress for your club or association. In addition, a special option appears at the bottom of the page to control how messages are threaded together (see below for more information.)

File Attachments

Use this option to control whether the forum allows attachments to messages.

Moderator Approval

Select **No** to allow any member to post messages that will immediately be visible. Select **Yes** to require that new messages and replies be approved by a moderator before they are visible.

The description of this screen continues below.

Message Delivery

Sending Emails Messages are sent to forum members via email
 Messages can be read online only

Forum Mode Discussion Forum Mode
NOTE: Emails are sent 'to' the member, and 'from' the forum - all replies are back to the forum.
 Listserver Mode
NOTE: Emails are sent 'to' the list, and 'from' the original message poster. Replies go to the forum or to the original poster.

Subject Tag
The subject tag is added to the message subject (enclosed in square brackets) when delivered via email. It is generally a short version of the forum name so that users can easily identify the source of email.

Message Threading Strong
Strong threading uses a token added to the message subject so replies can be attached to their parent messages. This guarantees that message threads will be properly preserved (assuming that the subject token is not modified by the user). However, some users find this token distracting.
 Weak
Weak threading uses internal message headers to attach replies to their parent messages. Some email programs do not properly set these internal headers, defeating the message threading. When the headers are missing, the system will try to match the subject of the message to an existing thread.

Figure 28.18b – Add/Edit Forum – bottom part

Message Delivery Section

Sending Emails

When the first option is selected, the forum will distribute every new message and reply to all forum members via email. This is the typical setting for a “listserver” or email-based forum.

When the second option is selected, the forum does not distribute messages via email. They are posted to the forum and can only be read online.

Forum “Mode”

This option is only displayed if the forum sends messages out via email. It governs how the system handles replies to forum messages.

In **Discussion Forum Mode**, the message looks like it’s coming “From” the forum and “To” the member. Replies are sent back to the forum. The sender’s email is not listed anywhere in the message.

In **Listserver Mode**, the message looks like it’s coming “From” the original message sender and “To” the forum (which has then forwarded it to the reader). When this option is selected an additional choice appears, governing what happens when users click their Reply button:

- Select **Forum** to have replies sent to the forum.
- Select **Original Message Poster** to have replies sent to the poster and not to the forum. Users can also click Reply All to send to both the forum and poster. This is the model used by Yahoo Groups and traditional listservers.

Important note: ClubExpress must be handling email for your club if you want to use the email list option. Another option is to obtain a domain name specifically for email-based forums (for example, “*MyClubForums.org*”).

Subject Tag

For email-based forums, specify the text that will be pre-pended to the Subject text of the message. This text is usually an abbreviated version of the forum name; members will use it to know which forum the message is coming from.

Message Threading

This option only appears if **Posting Method** (described above) is configured for “Online (Web Site) and Via Email”.

Selecting the **Strong** option adds a short unique “token” to the message subject. This system can read this token and know exactly which forum and thread the message belongs to. This token guarantees that message threads will be properly preserved (assuming that a receiving member has not modified or removed this token. However, some users find it distracting.

Selecting the **Weak** option uses internal message headers to attach replies to their parent messages, as described in the email standards. However, some email servers do not properly set these internal headers, which would otherwise cause this threading option to break. When the message headers are missing or not properly defined, the system will try to attach a message to a thread based on the Subject of the message.

Click **Save** to save your choices and return to the Forums Manager, or **Cancel** to return without saving.

EDITING AND DELETING FORUMS

Click the **Edit** link to modify forum properties.

For audit and liability reasons, ClubExpress does not allow you to delete forums completely. Instead, click **Edit** and set the forum's Status to "Archived". It won't appear in the Forum Manager unless you explicitly enable the archive option.

UNDERSTANDING FORUM MODERATORS

The forums module introduces a new level of security that doesn't exist in other modules: the "moderator".

Where club "administrators" control everything on the website and in the membership database, and "coordinators" have admin rights over one module or admin function, a moderator has admin rights over just one forum within the forums module.

Moderators can add or remove individual members, set member flags (message approval required, member banned, etc.) and approve or block individual messages or threads. Moderators will also see an **Admin** link at the thread and message level, giving them the tools required to fully moderate a single forum.

FORUM SPECIAL MEMBERS

Click the **Members** link in the Maintain column beside a forum to see the current members of the forum and to change member status. You will see a screen similar to the following:

Home • Forums • Forums Manager • Forums Member Manager

Forums Member Manager

Use this screen to set options on members that will apply to only to the displayed forum. Click the 'Search' button to search for members that participate in this forum. You would typically select to 'show special members', which are members that currently have special options set (such as opted out, banned, and moderated). Click 'Edit' to set or clear the options for a specific forum member. The other links in the Maintain column perform their expected functions.

Search For Members of Safety

Last Name

Show 'Special Members' Only
 Show All Members

Search Results (5 members found)

Member Name	Location	Moderator	Status	Opted-Out	Maintain
Abrams, Bret (172)	Ambler, PA		Moderated		Edit
Abrams, Callie (173)	Ambler, PA		Banned		Edit
Abrams, Eric (170)	Ambler, PA			Yes	Edit
Jones, Barbara (2)	Anytown, IL	Yes			Edit
True, Michelle (181)	chicago, IL	Yes			Edit

Figure 28.19 – Forums Member Manager

The default is to view “Special Members” only:

- members who are banned from the forum;
- members whose messages are moderated;
- members who are designated as moderators; and
- members who have opted-out of receiving messages from the forum.

If you are searching for a specific person, enter a portion of his or her name and click the **Search** button.

If your club is large and you’re viewing an “All Members” forum, be careful selecting “Show All Members” and clicking the **Search** button without a search value entered; the resulting screen will list every member of the club!

To modify the status of a member, click the **Edit** link beside that member’s name. You will see the following dialog:



Figure 28.20 – Forum Member Information

Select the appropriate option and click **Save** to save your choices, or **Cancel** to close the dialog without making a change. Changes take effect immediately.

SPECIAL MEMBERS FOR ALL FORUMS

In the Forums Manager, click the **Special Members** button to view and change special members for all forums. You will see a screen similar to the following:

Home • Forums • Forums Manager • Forums Member Manager

Forums Member Manager

Use this screen to set options on members that will apply to ALL forums. Click the 'Search' button to search for members that participate in forums. You would typically select to 'show special members', which are members that are currently opted out or banned from all forums. Click 'Edit' to set or clear these options for a specific forum member.

Search For Forum Members

Last Name

Show 'Special Members' Only Show All Members

Search Results (4 members found)

Member Name	Location	Status	Maintain
Abrams, Bret (172)	Ambler, PA	Moderated	Edit
Abrams, Callie (173)	Ambler, PA	Banned	Edit
Abrams, Eric (170)	Ambler, PA		Edit
Abrams, Lisa (174)	Ambler, PA		Edit

Figure 28.21 – All Forums Member Manager

The default is to view “Special Members” only:

- members who are banned from all forums; and
- members whose messages are moderated in all forums.

If you are searching for a specific person, enter a portion of his or her name and click the **Search** button.

If your club is large, be careful selecting “Show All Members” and clicking the **Search** button without a search value entered; the resulting screen will list every member of the club!

To modify the status of a member, click the **Edit** link beside that member’s name. You will see the following dialog:



Figure 28.22 – Edit All Forums Status

Select the appropriate option and click **Save**, or click **Cancel** to close the dialog without saving. Changes take effect immediately.

THREAD ADMINISTRATION

In Forum Messages view, administrators, forum module coordinators and individual forum moderators will see a special **Admin** link in the right-most column for each thread. Clicking this link displays the following popup dialog:

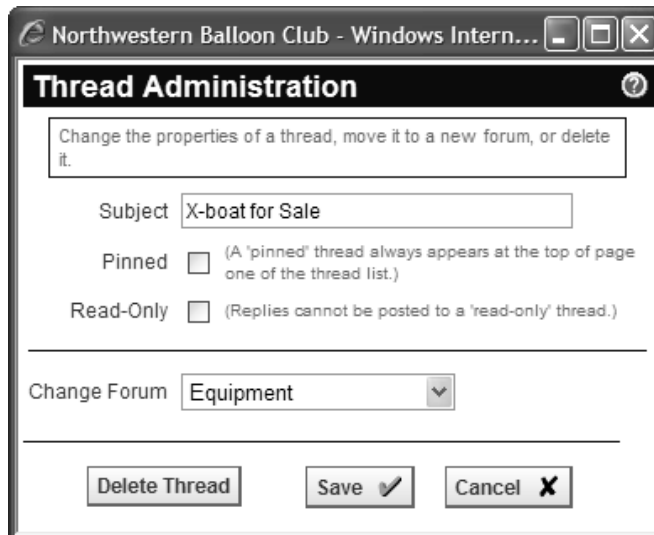


Figure 28.23 – Thread Administration

Using this dialog you can perform the following changes:

- Specify a new subject for all messages in the thread;
- Pin the thread to the top of the forum. This option is often used for frequently asked questions, or for a message explaining thread policies.

- Make a thread Read-Only. Replies cannot be posted to a read-only thread. This option is often used in conjunction with the pin option, to create a read-only thread at the top of the forum.
- Specify a new forum. The whole thread, including all replies, is moved to the new forum. This option is often used to move commercial messages to a special forum; it can also be used to move objectionable messages to a hidden location without deleting them.
- Delete the thread and all its messages. This option is not generally recommended; if someone posted an objectionable or inappropriate message, it is often better to remove it to a hidden forum for audit purposes or to protect the club. You will be prompted to confirm this action.

Click **OK** to confirm your action and return to the list of threads, or click **Cancel** to return without performing any action.

MESSAGE ADMINISTRATION

In Threaded or Flat view, administrators, forum module coordinators and individual forum moderators will see a special **Admin** link for each message displayed, just to the left of the Reply link. Clicking this link displays the following popup dialog:

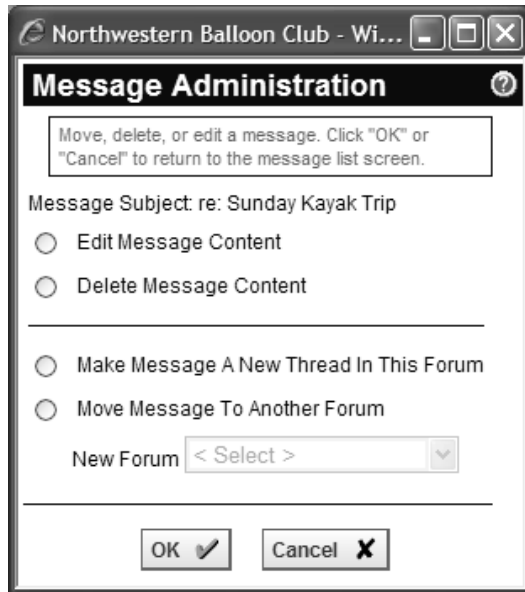


Figure 28.24 – Message Administration

Using this dialog box you can perform the following changes:

- **Edit Message Content.** The message editor will be displayed, allowing the forum administrator to change the actual message.
- **Delete Message Content.** The message shell is retained so that threads are not broken but the text of the message is replaced with a standard message that the content was deleted by the moderator. Use this option if the content of the message is objectionable or dangerous in some way and you need to get rid of it without retaining a copy.
- **Make Message A New Thread In This Forum.** Use this option if the message strays from the original purpose of the thread and really belongs in a new thread. All direct replies to the message will also be moved to the new thread.
- **Move Message To Another Forum.** Use this option if the message strays from the original purpose of the thread and the current forum; for example, if it's a commercial message in a technical forum. You can also use this option to move a message that is objectionable in some way to a hidden, moderator-only forum, if you need to retain a copy. All direct replies to the message will also be moved to the new forum.

Click **OK** to confirm your action and return to the messages in the current thread, or click **Cancel** to return without performing any action.

Editing Attachments

If you want to delete attachments linked to a message, select the **Edit Message Content** option. You will see a screen similar to the following:



Figure 28.25 – Editing files attached to a message

Click the filename to open or save a file. Check the box to delete the file. Your changes take effect when you click the **Save Changes** button.

MODERATING MESSAGES

If a moderator has messages awaiting approval, there will be a link on the forum home page indicating the number of messages awaiting approval.

Home • Forums

Forums

You have 1 message(s) awaiting approval

Search Our Forums Policy

Public Forums

All public forums

Forum	Threads	Posts	Last Post
Safety Active This forum focuses on safe flying, including equipment	16	55	8/18/2007 6:52 PM

Figure 28.26 – Forum Moderator Notification

Clicking the link takes you to a page similar to the following:

Home • Forums • Forum Message Approval

Forum Message Approval

Author	Forum / Subject	Post Date
Dan95	Equipment / re: New Burner - Anyone Tried?	8/19/2007 11:24 AM
Dan Ehrmann Rolling Meadows, IL Approve Block Edit	We've been using the new burner for weeks as part of the beta test. No problems at all. Dan	

Return to Previous Page

Figure 28.27 – Forum Message Approval

You will see all pending messages and can take the following actions:

- **Approve** the message so that it's visible to all members of the forum.
- **Block** the message. It will still be in the forum but only moderators, coordinators and administrators can view it.
- **Edit** the message. You will see the message editor so that you can change the message. This option is available so that you can fix problems before approving the message.

Once a message has been handled, it will disappear from this display.

Moderating Messages in the Forum

When moderators view messages in a forum, a rubber stamp icon indicates messages which need approval or which have been blocked, as shown in the following example:

The screenshot shows a forum thread titled "Equipment: New Burner - Anyone Tried?". It contains three messages:

Author	Subject	Last Post
Admin	re: New Burner - Anyone Tried?	8/19/2007 11:24 AM
msmith	re: New Burner - Anyone Tried?	8/19/2007 11:22 AM
Jonesy	? New Burner - Anyone Tried?	8/19/2007 11:09 AM

The first message (Admin) contains the text: "We've been using the new burner for weeks as part of the beta test. No problems at all. Dan". It has a rubber stamp icon in the bottom right corner.

The second message (msmith) contains the text: "Higher pressure emans that there's more risk or an explosion. I wouldn't take the risk." It has a rubber stamp icon with a red circle and line in the bottom right corner.

The third message (Jonesy) contains the text: "There's a new type of burner being announced tomorrow by Cameron. It has a narrower nozzle and higher temperature to create more lift." It includes a profile picture of a woman, the text "Admin Reply", and an image of a burner. Below the image is the text: "Has anyone used this new type and can recommend it? Regards, BJ".

Figure 28.28 – Moderator view of messages in a forum

In the first message, the rubber stamp icon indicates a message awaiting approval. In the second message, the rubber stamp icon with a red circle and line indicates a blocked message. (Notice also that there is no **Reply** link for either of these messages.)

Clicking either the icon or the **Admin** link displays the Message Administration dialog with additional options:

- For a message awaiting approval, you can approve or block the message.
- For a blocked message, you can unblock it, making it visible to all forum members.

Chapter 29 – Modules – Chapter Finder

INTRODUCTION

If your club or association is configured as a Parent club with local chapters, the Chapter Finder module allows website visitors and members to locate chapters. Selecting this option from the menu displays a screen similar to the following:



Figure 29.1 – Chapter Finder

Information on a chapter or district will only be shown once you have clicked the map.

The example above shows the built-in US map. You also have the option of using your own map or of not showing a map at all. With the built-in US map, a **Show All Districts** (or whatever keyword you specified) button displays a list of the topmost groups in your hierarchy, from which you can start drilling down and

up through the hierarchy. You can also click the **Show Non-US Chapters** (if this option is enabled) to display chapters not shown on the map.

Using the built-in US map, click a state to view chapters in that state. Click a chapter to see a more detailed display. In the Chapter Finder configuration screen, you can control what data to show for each chapter (see page 170.)



Figure 29.2 – Viewing details for a chapter

If you have a multi-level hierarchy (your chapter is part of a district, which may in turn be part of a region), you will see these parent levels listed above the map. Click a level to view the matching details for that district or region.

If the Member Directory module is enabled, click the **Members** link to view members in the current chapter, district or region. You can also click the **Upcoming Events** link to jump to the event calendar showing just upcoming events for that chapter, district or region.

Chapter 30 – Modules – Photo Pages

INTRODUCTION

ClubExpress supports custom photo pages containing photos uploaded by administrators or individual members. Each photo is stored in multiple resolutions with a title, caption, photographer's name, the date the picture was taken, and one or more tags describing the photo.

Photo pages are organized into categories that can be anything you want, as general as "Events" or as specific as "Summer Picnic 2004". Individual photo pages can be placed on the menu.

PHOTO PAGE LIST

ClubExpress also includes a Photo Page List module that collects all defined photo pages onto a single page. This module can easily be placed on the menu as a single entry point into your organization's photos. Clicking the Photo Page List link displays a screen similar to the following:

The screenshot shows a web interface for the 'Photo Page List' module. At the top, there is a navigation bar with 'Home' and 'Photo Page List' links, and an 'Admin' link with a user icon. Below the navigation bar is a large black header with the text 'Photo Page List' in white. Underneath the header is a white box containing the text: 'This is a list of photo pages by category. Click on a photo page name to view the photos.' The main content area is divided into three sections, each with a category title, a thumbnail image, a title, a 'View Photos' button, and some metadata.

Category	Thumbnail	Title	Last Updated	No. of Photos	Action
Ballooning		Launching	8/19/2009	8	View Photos
Ballooning		Balloons in Flight		11	View Photos
Social Events		Sunday Fun at the club		3	View Photos

Figure 30.1 – Photo Page List

Photo pages are organized into categories. Within each category, photos can be displayed in alphabetical order or in descending order by when the photo page was last updated. Member photo pages comprise their own category that can be placed at the beginning or end of the list.

You can also control whether a preview photo is shown, and whether the system will display the number of photos on each page and the date on which the page was last updated.

Clicking the **View Photos** button (or the preview photo if one is shown) displays a photo page similar to the following:

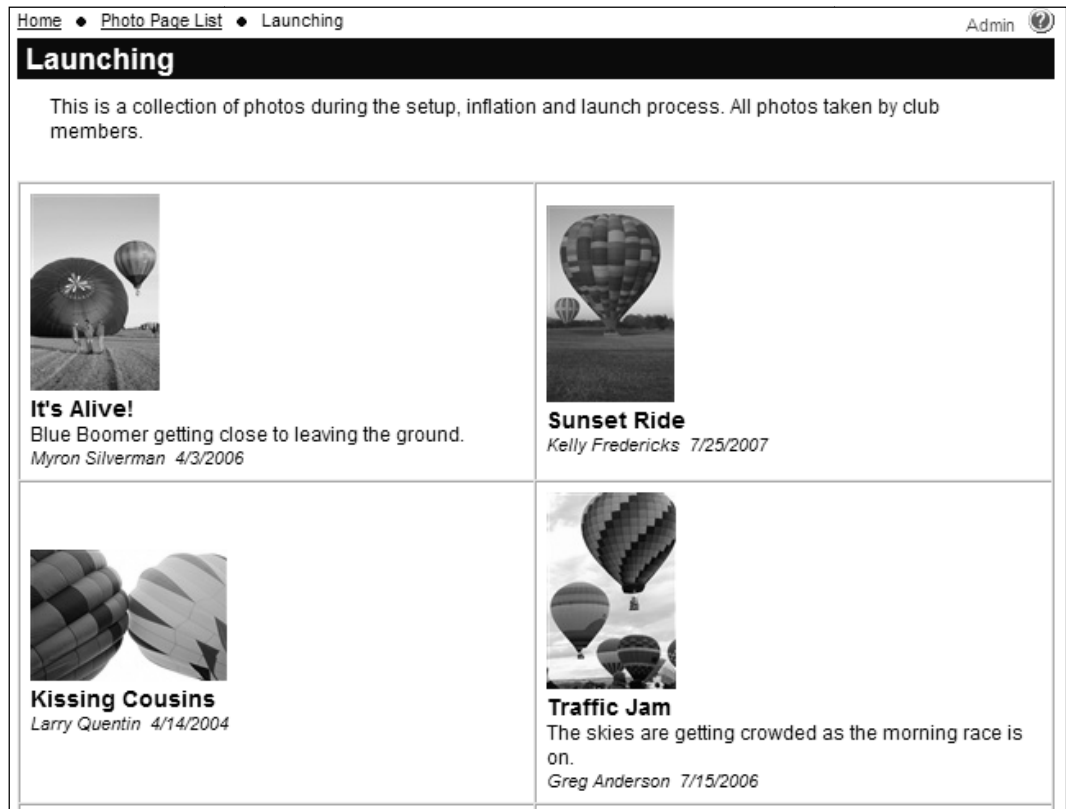


Figure 30.2 – A Typical Photo Page

Each photo page can have its own introductory text. Nine layouts are available, with 1, 2 or 3 photos across the page and with a title and caption for each photo, or just a title only, or neither.

Clicking a thumbnail image displays a popup window with a larger version of the photo, as shown in the following example:

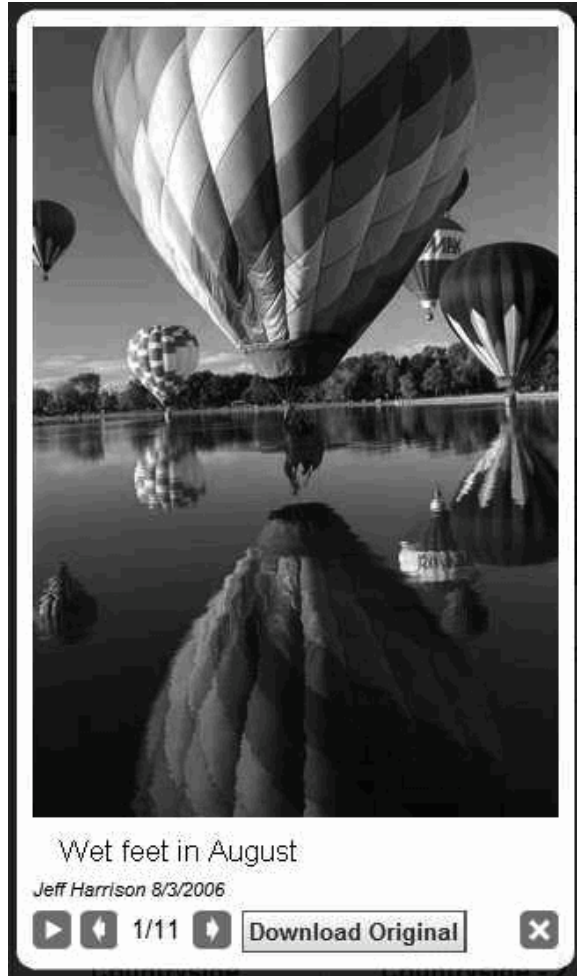


Figure 30.3 – Viewing a Photo

The popup window will dynamically resize for each photo. The **Previous** and **Next** arrow buttons in the lower left corner (on either side of the image counter) allow you to navigate through the photos on the page while in the popup (you can also click on the right or left halves of the photo itself.)

Click the “Play” arrow in the lower left corner to start slide-show mode; the image will advance every 4 secs. Click the “Pause” button to exit slide-show mode. Click the close button in the lower right corner to close the window.

The **Download Original** button allows you to download a high-resolution version of the photo if one exists. Administrators and members have the ability to turn off this button if they don’t want you to download the hi-res version; you can still right click on the photo and select the Save Picture As... option to save the screen version to your local hard disk.

Typical hi-res photos are much larger than your screen, so when hi-res photos are uploaded, a screen size (and a thumbnail) are generated automatically. Admins can control the resolution of the screen size; the default is 450px for the largest height or width but you can make this larger for more dramatic previews.

PHOTO PAGE ADMINISTRATION

There are two ways to manage photo pages:

1. Administrators can select **Control Panel – Photo Pages**
2. When viewing the Photo Pages List custom module, coordinators and administrators can click the **Admin** link in the top right corner of the screen.

In both cases, the Photo Page Manager is displayed. See page 204 for more information.

To manage an individual photo page, click the **Admin** link in the top right corner of the page. You will be taken to the **Edit Photo Page** screen for this page, allowing you to manage the photos on the page as well as its layout, title and preamble text.

Chapter 31 – Modules – FAQ

INTRODUCTION

FAQ stands for “Frequently Asked Questions”. This module is used to create custom pages of questions and answers, organized into topics. It might also be called the “Technical Library” module because of its ability to create a library of articles on technical subjects.

For example, a vintage car club might have a library of how-to articles on various aspects of restoration, while a sailing club has similar articles on equipment, racing techniques, safety issues and certifications.

The FAQ module uses the advanced Content Editor to create pages of any length, with complete control over fonts, alignment, colors, embedded images, links and other complex formatting.

A typical FAQ category screen is shown below.

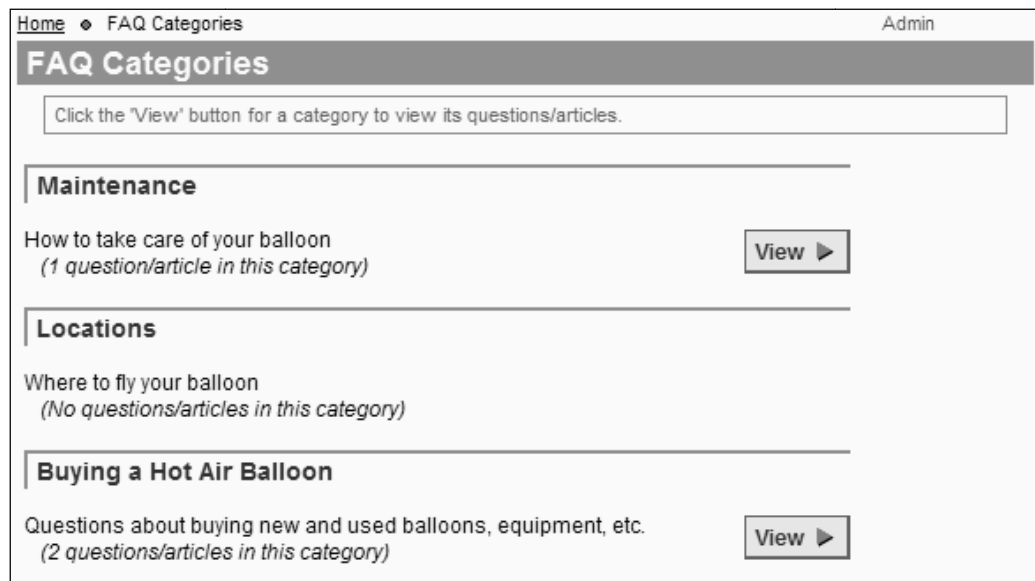


Figure 31.1 – FAQ Category screen

Click the **View** link to view the questions within a category. A screen similar to the following will be displayed.

Note that if there is only one FAQ category defined, this screen is skipped and the system jumps directly to the FAQ questions screen.

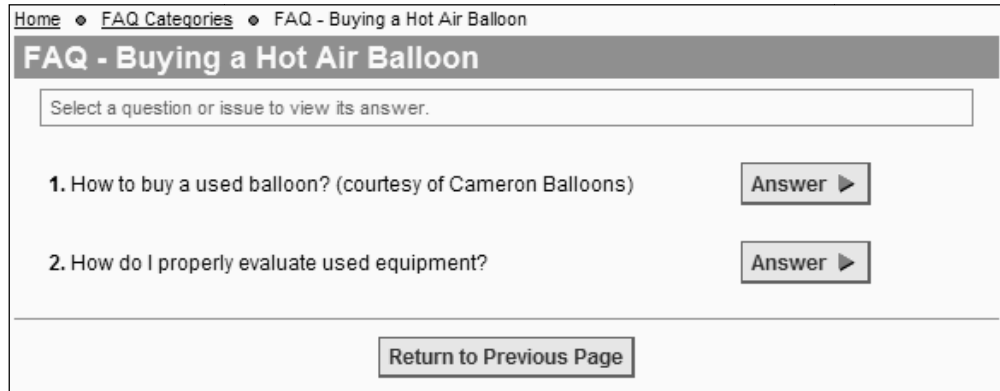


Figure 31.2 – FAQ Questions screen

Click the **Answer** link to view the answer to a specific question. A screen similar to the following will be displayed.

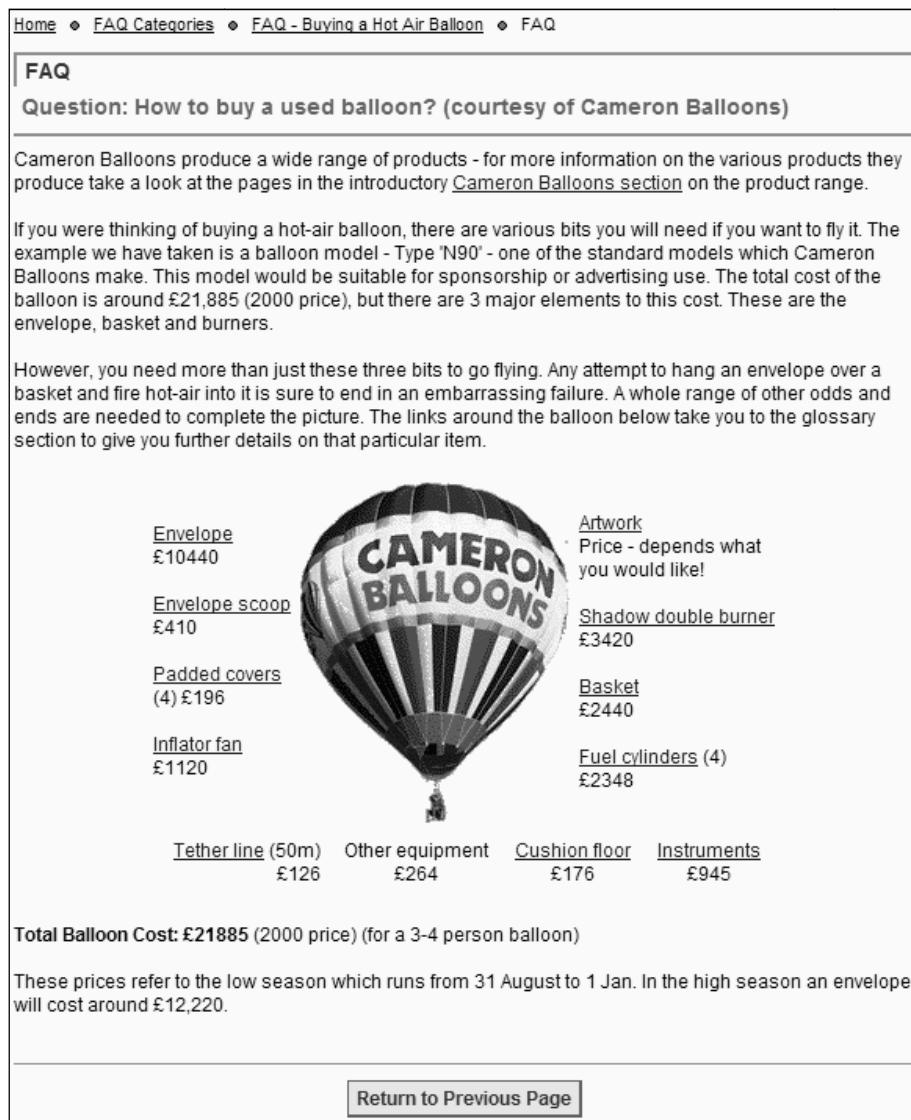


Figure 31.3 – FAQ Answer

When answers are relatively short, you can configure an option to show questions and answers on the same page. The resulting screen looks similar to the following:

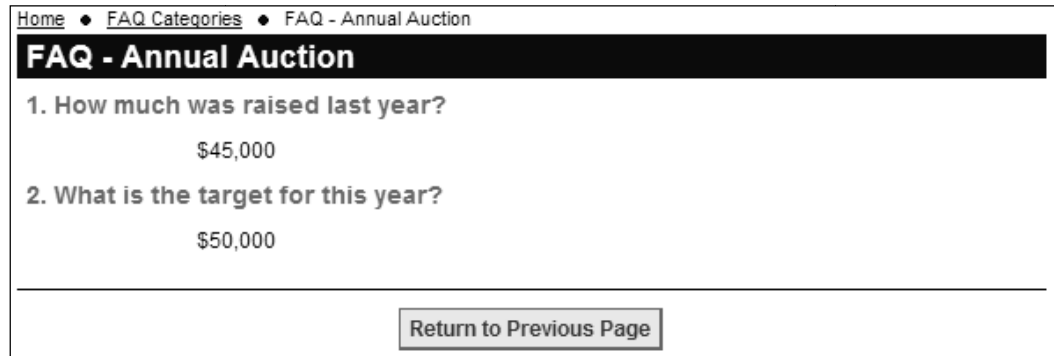


Figure 31.4 – FAQ Questions and Answers on the same screen

Press **Return to Previous Screen** to move back up through the sequence of screens.

FAQ ADMINISTRATION

There are two ways to manage FAQ categories and pages:

1. Administrators only can click the **Admin** link beside the FAQ module in the Built-In Module Index screen.
2. When viewing the main FAQ Categories panel, coordinators and administrators can click the **Admin** link in the top right corner of the screen.

The following screen is displayed:

Home • Control Panel • Built-in Module Index • FAQ Category Administration

FAQ Category Administration

This is the FAQ categories. Click "Add Category" to create a new category, or "Edit" to edit an existing category. You can only delete a category if there are no questions assigned to it. Click "Questions" to manage the questions assigned to each category.

[Add Category](#) [Display Sequence](#)

Category	FAQ View	Maintain
Maintenance	Single-Page	Edit Questions
Locations	Multi-Page	Edit Questions Delete
Buying a Hot Air Balloon	Multi-Page	Edit Questions
Annual Auction	Single-Page	Edit Questions
Repairing a Balloon	Multi-Page	Edit Questions Delete

[Return to Previous Page](#)

Figure 31.5 – FAQ Categories Administration

Each category is shown together with the “view” setting for that category. To create a new category, click the **Add Category** button. The following popup window is displayed:

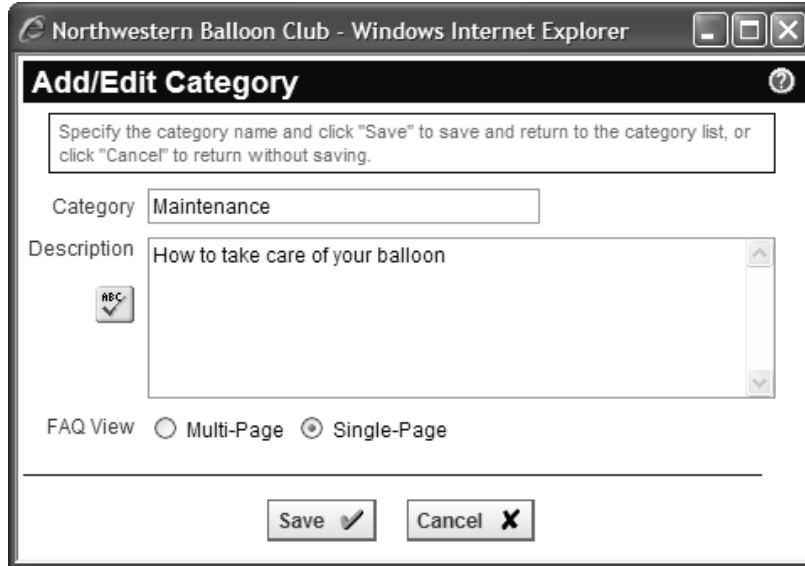


Figure 31.6 – Add/Edit FAQ Category

Specify the category name and a description. You can also specify View options:

- Multi-page – questions and answers are shown on separate pages.
- Single-Page – questions and answers are shown on the same page.

Click **Save** or **Cancel** to close the window and return to the previous screen.

To modify an existing category, click the **Edit** link and the same popup window is displayed. A category can only be deleted if there are no questions assigned to it. Click the **Delete** link. A confirmation prompt is displayed.

Click **Display Sequence** to modify the order in which categories are displayed. Select a category from the list and click the up or down arrows to move its position within the list. Click **Save** or **Cancel** to close the window and return to the previous screen.

MANAGING QUESTIONS

To manage questions within an FAQ category, click the **Questions** link. You will see a screen similar to the following:

The screenshot shows a web interface for 'FAQ Administration'. At the top, there is a breadcrumb trail: Home • Control Panel • Built-in Module Index • FAQ CategoryAdministration • FAQ Administration. Below this is a dark header with the text 'FAQ Administration'. A text box contains instructions: 'This is a list of questions or issues, each with a defined answer. Click "Add Question" to create a new question and answer, or "Edit" to edit an existing question. Click "Delete" to remove a question. Questions can be moved to a different category on the Edit screen.' Below the text box, the category is identified as 'Category: Buying a Hot Air Balloon'. There are two buttons: 'Add Question' and 'Display Sequence'. A table lists two questions:

Question Title	Active?	Maintain
How to buy a balloon	Yes	Edit Delete
Buying Used Equipment	Yes	Edit Delete

At the bottom of the interface is a 'Return to Previous Page' button.

Figure 31.7 – Questions within an FAQ category

Questions are listed in the specified display sequence, with the create date and format. To add a question, click the **Add Question** button. To edit the information for an existing question, click the **Edit** link; the same popup window is displayed. To delete a question from the system, click the **Delete** link; you will be prompted to confirm this operation.

Click the **Display Sequence** link to change the order in which questions are displayed within a category.

When you add a new question or edit an existing question, the following popup window is displayed:

Chapter 32 – Modules – Donations

INTRODUCTION

The Donations module allows you to establish funds into which members and non-members can donate. A number of options are provided to control fund visibility, target and whether anonymous donations are allowed. Donations are processed through the same payments processing module that's used for memberships and event registrations.

A typical Donations screen is shown below:

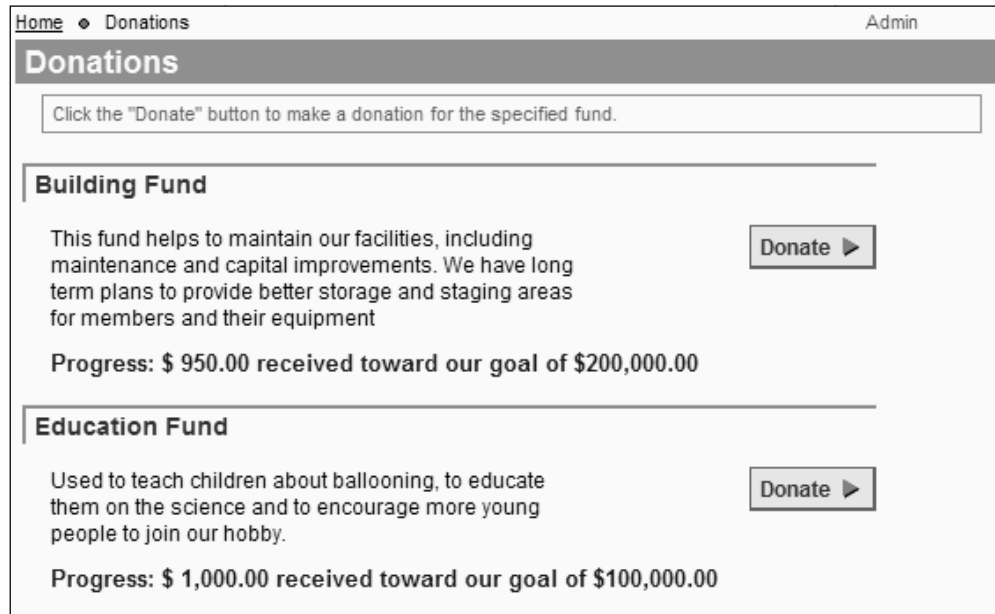


Figure 32.1 – Donations screen

Each fund has a title and description plus, optionally, progress towards a target amount. Click the **Donate** button to make a donation. You will see a screen similar to the following:

Figure 32.2 – Making a Donation into a fund

Club Administrators see a version of the page with the following options:

- Make a donation themselves;
- Record a donation by another member (member selector is displayed);
- Record a non-member donation (contact fields are displayed.)

Use the Comment field to attach a note to the donation. For example:

In honor of Jack and Mary Smith, for 10 years of service to the club.

This comment field is included in the donation confirmation email and on donation reports.

Click **Proceed to Payment** to complete the Donation by paying via credit card or check.

Members see a simple Donation Amount screen that may have a suggested amount already showing. Some funds also allow the donation to be made anonymously. It will still be visible to club administrators, but they will know that it should be reported to the membership without the donor's name.

Non-members see a version of the page with a number of fields to collect their name and contact information. Non-members who have previously made a donation or attended a club event can search for their record in the non-member database, so that the new donation is linked to the existing record.

DONATION ADMINISTRATION

There are two ways to manage Donation funds and Donations:

1. Administrators only can click the **Admin** link beside the Donations module in the Built-In Module Index screen.
2. When viewing the main Donations panel, coordinators and administrators can click the **Admin** link in the top right corner of the screen.

The following screen is displayed:

The screenshot shows the 'Donations Administration' interface. At the top, there are navigation links: Home, Donations, and Donations Administration. Below the title, a message box explains the screen's purpose: listing funds, adding new ones, editing existing ones, and viewing donation lists. Three buttons are visible: 'Add Fund', 'Display Sequence', and 'Donation Reports'. The main content is a table with the following data:

Fund	Established	Status	Goal	# To Date	\$ To Date	Maintain
Museum Fund	3/28/2006	Inactive	10,000.00	34	5,004,075.00	Edit Donations Reports
Education	8/4/2006	Active	100,000.00	93	136,877.00	Edit Donations Reports
Dues	7/30/2007	Inactive	0.00	34	885.56	Edit Donations Reports
2010 USTBA Team Membership	1/17/2010	Active	0.00	3	105.00	Edit Donations Reports
SEED	9/1/2006	Active	0.00	10	5,841.00	Edit Donations Reports
Wheelchair Foundation	10/13/2008	Active	5,000.00	3	200.00	Edit Donations Reports
HIN,Polar Jacket,L	1/9/2009	Inactive	0.00	3	300.00	Edit Donations Reports
HIN,Polar Jacket,XL	10/11/2006	Inactive	0.00	27	28,075.00	Edit Donations Reports
Rit,Stem,	1/9/2009	Inactive	0.00	1	25.00	Edit Donations Reports
Endowment	1/4/2007	Active	0.00	12	14,515.00	Edit Donations Reports
Jamboree 09	5/6/2008	Active	0.00	17	652.50	Edit Donations Reports
Membership System Drive	7/31/2007	Active	5,000.00	8	1,689.00	Edit Donations Reports

At the bottom of the screen, there is a 'Return to Previous Page' button.

Figure 32.3 – Donations Administration

This screen shows the various funds you have defined. Funds have a specific purpose and act as buckets into which donations are made. To add a new fund, click the **Add Fund** button. You will see the following screen.

Northwestern Balloon Club, LLC. - Windows Internet Explorer
 https://democlub.clubexpress.com/popup.aspx?page_id=303&club_id=245449&item_

Add/Edit Fund

Specify the fund name, description and other properties. Click "Save" to save and return to the fund list or "Cancel" to return without saving. If you check "Suggest Amount" or "Show Goal" additional fields will be displayed to enter the respective amounts.

Fund Name

Purpose
 Max 1000 characters - 932 characters left

Date Established

Active

Members Only

Allow Anon.

Suggest Amount \$

Show Goal \$

Financial Account

QuickBooks Item Name

Non-Member Category

Figure 32.4 – Add/Edit Fund

Specify the title and description for the fund (up to 1000 chars.) The following options are also available:

- Use the **Active** checkbox to control when the fund is visible. Some funds may be seasonal in nature, only visible at certain times of the year.
- Use the **Members Only** checkbox to limit fund visibility to only members. If the Donations module is placed on the public side of your website, this fund will not be included unless the member is logged in.
- Use the **Allow Anonymous** option to display a special question to donors: "Do you want this donation to be reported as anonymous?" As an administrator, you will still be able to see who made the donation, but if

the donor answered “Yes” to this question, he or she is asking you to report this donation as anonymous to the membership or public.

- The **Suggested Amount** option allows you to suggest how much should be donated. When you check this box, an amount field is displayed. The specified value will be shown on the Donations page (but it can always be modified.) Note that the initial maximum donation is \$100. Please contact us if you would like it raised to a higher number.
- The **Show Target** option controls whether the fund has a target amount. When you check this box, another amount field is displayed to enter the target. If this option is enabled, the system will also display a progress message on the main Donations page indicating how much has been raised to date towards the target.

You can also specify the financial account to be used for donations and the category in the Non-Member Database to be used when non-members make donations. Click **Save** to save your changes and return to the Donations Administration screen, or **Cancel** to return without saving.

Click the **Edit** link to modify properties for an existing fund. You will see the same dialog described above.

Click the **Display Sequence** button to modify the display order of funds. There is no Delete option (because there may be donations already recorded for a fund.) If you no longer need a fund, uncheck the Active checkbox.

Click the **Donation Reports** button to display a popup dialog showing available reports on donation activity. These are the same reports shown on the Control Panel – Reports screen for donations.

Donations

Click the **Donations** link to display a list of donations. You will see a screen similar to the following:

Home • Control Panel • Built-in Module Index • Donations Administration • Donations for Wheelchair Foundation

Donations for Wheelchair Foundation

This screen lists the donations made for the specified fund. Click the Add Donation button to create a new donation. Click the Payment link if you received payment for a pledged donation. You can also click Cancel to remove a donation if it has not been paid.

Add Donation

Donor Name	Member	Date	Amount	Anon.	Status	Maintain
Barbara Jones	Yes	3/14/2009	50.00	No	Paid in Full	
Martin Smith	Yes	10/13/2008	100.00	Yes	Paid in Full	
Martin Smith	Yes	10/13/2008	50.00	No	Paid in Full	

[Return to Previous Page](#)

Figure 32.5 – Donations for a Fund

This screen shows the donor name and whether he or she is a member, the date and amount of the donation, whether it should be reported as anonymous, and the payment status.

Open donations (unpaid) can be marked as paid by clicking the **Payment** link, or cancelled by clicking the **Cancel** link. Paid donations cannot be modified.

Reports are also available to show donations to a fund

Chapter 33 – Modules – Surveys

INTRODUCTION

The Surveys module allows you to create surveys on your website, to solicit feedback from members or non-members. Surveys can be used for many purposes, including learning what types of events members want to attend and which areas of a hobby or profession members are most interested in.

The surveys module can even be used to run elections for your organization, since responses cannot be modified or deleted, and since you can set flags which allow only members to take the survey and then, only once each.

Surveys can be spread across multiple pages and can have any number of questions. Each question can be displayed in one of 15+ formats, and certain types of questions can be grouped together under a single heading.

A typical Surveys screen is shown below:

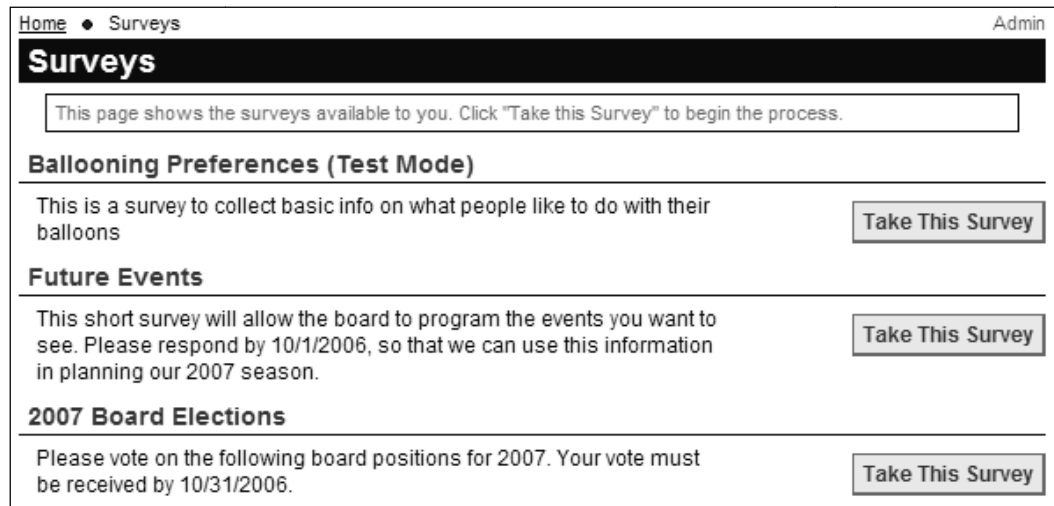


Figure 33.1 – Surveys screen

This screen shows the surveys available to the user. Clicking the **Take this Survey** button launches the survey wizard, presenting the first page of the survey (note that the button may have different text.) This screen can be placed on the public or members-only sides of your website; on the public side, it will only show surveys that non-members can take.

In the advanced Content Editor, the link builder also allows you to create a link directly to the first page of a survey. Using this feature, you can place this link almost anywhere on your website, including the home page, a custom page, an event screen, the area under the menu on some templates and even in a forum message.

TAKING A SURVEY

Surveys typically begin with a preamble page that explains the purpose of the survey. ClubExpress supports both a preamble and a “postamble” page.

At the bottom of each page are **Back**, **Cancel**, and **Next** buttons (although Back does not appear on the first page and Next does not appear on the last page.) Use these buttons to navigate between the pages of the survey. If you click the Next or Back buttons and you have not supplied a response to one or more required questions, you will not be able to leave the page until an answer is supplied.

SURVEYS ADMINISTRATION

There are two ways to manage Surveys:

1. Administrators only can click the **Admin** link beside the Surveys module in the Built-In Module Index screen.
2. When viewing the main Surveys panel, coordinators and administrators can click the **Admin** link in the top right corner of the screen.

The following screen is displayed:

The screenshot shows the 'Surveys Manager' interface. At the top, there is a breadcrumb trail: Home • Surveys • Surveys Manager. Below this is a header 'Surveys Manager' and a text box with instructions: 'Use this screen to manage surveys. Click the "Search" button to search for surveys. You can also organize surveys into categories for management purposes. Click "Add Survey" to create a new survey. You will see the properties screen which allows you to define general survey properties. Click "Edit" to modify these properties for an existing survey. Click "Pages/Questions" to build out the details of your survey, including the questions that will appear on each page. The other links in the Maintain column perform their expected functions.'

Below the instructions is a search section titled 'Search For Surveys'. It includes a 'Category' dropdown menu set to '< All Categories >', an 'Active Only' checkbox, and a 'Search' button with a lightning bolt icon. To the right are two buttons: 'Survey Categories' and 'Add Survey'.

Below the search section is a 'Search Results' section containing a table with the following data:

Title	Category	Last Updated	Status	Responses	Maintain
2007 Board Elections	General Opinions	8/15/2006	Active	0	Edit Pages/Questions Preamble Results Copy Postamble Reports Delete
Ballooning Preferences	General Opinions	8/10/2006	TestMode	1	Edit Pages/Questions Preamble Results Copy Postamble Reports Delete
Future Events	General Opinions	8/15/2006	Active	0	Edit Pages/Questions Preamble Results Copy Postamble Reports Delete

At the bottom of the interface is a 'Return to Previous Page' button.

Figure 33.2 – Surveys Administration

The initial screen is blank. Click the **Search** button to display all surveys. You can also filter the display by category and by Active surveys only. The grid shows the survey title, category, last update, status and number of responses received to date.

The following actions are available by clicking the link in the Maintain column:

- Select **Edit** to edit the properties for an existing survey.
- Select **Pages/Questions** to edit the pages on which the survey is organized and displayed and the questions showing on each page. These functions are described in more detail below.
- Select **Preamble** to define an opening page and edit the text for this page. You can also remove an existing preamble.
- Select **Postamble**³ to define a closing page and edit the text for this page. You can also remove an existing postamble.
- Select **Results** to view results for each person who took the survey. There is also a results option at the question level, to view results for just that question.
- Select **Reports** to display a list of available reports at the survey level. There is also a reports option at the question level, to view reports for just that question.
- Select **Copy** to make a copy of a survey (just the questions, not the answers.) Use this option if you want to repeat a survey, perhaps with minor changes, while still retaining the original and its responses.
- Select **Delete** to completely remove a survey. All questions and responses will be deleted and cannot be recovered.

Each of these options is discussed in more detail below.

³ If “preamble” is a word, why not “postamble”? Consider it invented!

SURVEY CATEGORIES

Survey categories allow you to organize and filter surveys for administrative purposes. Unlike other modules, survey categories are not used on the public side of the module, only on the administration side. The reason for this is that you will usually have a small number of surveys active at a time, and it's more important to control the display order for these surveys.

Click **Survey Categories** and you will see a screen similar to the following:

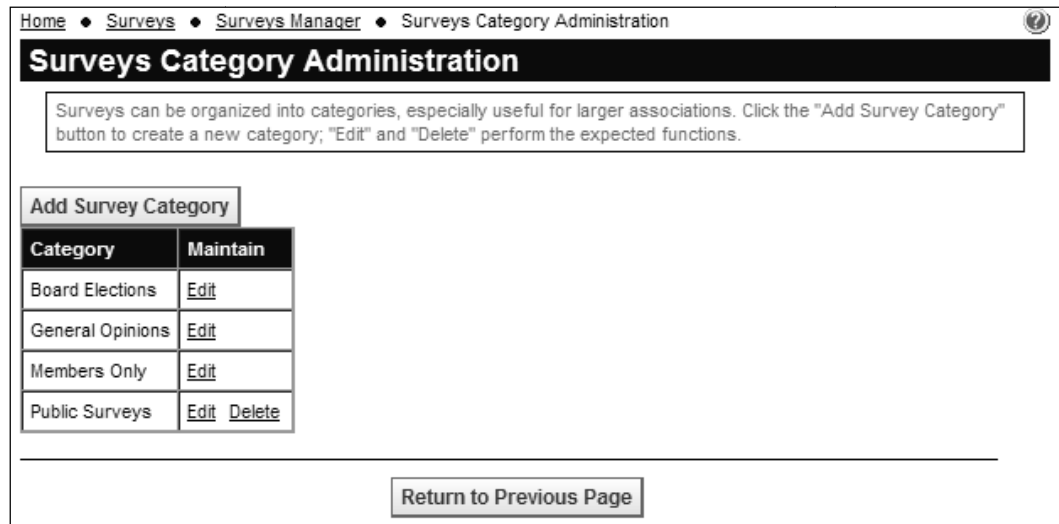


Figure 33.3 – Survey Categories

Click the **Add Survey Category** button to add a category. Click the **Edit** link to edit the text of an existing category. A **Delete** link is also shown if the category is not currently in use.

ADD SURVEY

Click the **Add Survey** button to create a new survey. You will see the following popup dialog:

Northwestern Balloon Club - Windows Internet Explorer
 https://democlub.clubexpress.com/popup.aspx?page_id=321&club_id=2454

Edit Survey

Specify the general properties of the survey, including its availability, status, close method, response types and voting style. Click Save to save your changes and return to the Survey Manager, or Cancel to return without saving.

Title:

Description:
 Max 1000 characters - 918 characters left.

Category:

Availability:

Status:

Take Survey Button Text:

Close Method:

Allow anonymous responses?

Allow members to vote multiple times? Yes No

Display results to member on completion?

Internet | Protected Mode: On | 100%

Figure 33.4 – Add Survey

The survey title is used in the Survey Manager, on the survey index page and in the heading of each page of the survey. It tells users and admins which survey they are taking or managing. The description (up to 1000 chars) is only used on the survey index page. Category allows you to group similar surveys.

Availability

Surveys can be configured to be available to every visitor to the website, to members only, to members of a committee only, or to members with a specified member type only. If you select one of the last two options, the screen will refresh and a new field will be displayed, allowing you to select the committee or member type.

“Take Survey” Button Text

Specify the text to use on the “Take this Survey” button

Closing Method

Surveys can be closed in one of three ways:

1. Manually, by changing the survey status.
2. On a specified date. A new field will be displayed, allowing you to select the date after which the survey will no longer be available.
3. After a specified number of responses have been received. A new field will be displayed, allowing you to specify how many responses will be accepted before the survey is closed. Note that this number is checked when the available surveys screen is displayed. If you only want 100 responses, and you already have 99, and two people decide to take the survey at the same time, both will be allowed.

Anonymous Responses

Each survey can be configured to handle anonymous responses in one of three ways:

1. Not allowed. All users must be identified. This option is not valid for surveys that are also available to non-members.
2. Optionally allowed. Users can decide if they will be anonymous or not. This option allows the survey to be placed on the public side of the website, but non-members will be anonymous by definition. If you have a Preamble page defined, this question will appear on the Preamble page. If not, it will appear on its own page.
3. Required. No users are identified. This option is valid for members and non-members. This option is suitable for elections.

If anonymous responses are allowed or required, the system may still test the currently logged-in member, in order to enforce the option (described below) that members can only vote once. However, the member’s name is never shown and cannot be revealed. Requiring anonymous voting is an appropriate setting for conducting elections.

Allow Multiple Voting⁴

You have the option of allowing or blocking multiple votes by the same person. This restriction is only enforced on members; the system cannot determine if a non-member has previously voted.

Most surveys which are also available on the public side of your website should set this option to Yes; allow people to vote multiple times. On the other hand, a survey that is an election vote should set this option to No.

Display Results

Check this box to provide users with a popup screen listing their answers when they finish the survey. This screen can be printed so that users have a receipt.

Click **Save** to save your changes and create the new survey, or **Cancel** to close the dialog without saving. New surveys are created as Inactive.

Survey Status

If you subsequently click the **Edit** link in the Survey Manager, one additional option is shown: Status. The following options are available:

Inactive	Newly-created surveys have this status. An inactive survey is one that's still being designed, or one that you want to modify even after it's been active.
Active	Select this option when you want to make the survey available to respondents for real. All settings are enforced. This option will not be available for new surveys that don't yet have pages and questions.
Test Mode	Select this option when you want to test the survey. It won't be available to users, just admins and cords. Also, various restrictions on the number of allowed responses and on who can take the survey, are not enforced for surveys in test mode.
Closed	Select this option to manually close a survey that has previously been active.

⁴ In our home-town, this is known as “Chicago-style voting” – vote early and vote often!

PAGES / QUESTIONS - PAGES

Select the **Pages/Questions** link to define survey questions and the pages on which they appear. You will see a screen similar to the following (assuming some questions have already been defined):

Home • Surveys • Surveys Manager • Survey Pages/Questions

Survey Pages/Questions

This screen allows you to build the pages and questions of the survey. Use the Scratchpad "page" for questions which are not shown to users. You must add a page to the survey before you can put questions on the page. Use the "Page Sequence" button to control the order of pages, and the "Question Sequence" link to control the order of questions within a page. Use the "Add Question" button to add a simple question, or the "Add Scale Question" button to add a series of scale questions with the same values. You can also view answers and reports from this screen.

[Add Page](#) [Page Sequence](#) [Add Question](#) [Add Scale Question](#)

Ballooning Preferences

Page Question	Question Type	Required	Maintain
Scratch Pad (Not Shown)			
Balloon type	Radio Buttons	Yes	Edit Delete Reports Answers: Detail Summary
How long a fan	Integer	No	Edit Delete Reports Answers: Detail Summary
Page 1			Edit Delete Question Sequence
Where	Checkbox List	Yes	Edit Delete Reports Answers: Detail Summary
Relative Importance	Heading (no resp.)	No	Edit Delete Reports
Relative Importance-Safety	Scale	No	Edit Delete Reports Answers: Detail Summary
Relative Importance-Government regulation	Scale	No	Edit Delete Reports Answers: Detail Summary
Relative Importance-Education	Scale	No	Edit Delete Reports Answers: Detail Summary
Relative Importance-Open skies	Scale	No	Edit Delete Reports Answers: Detail Summary
Relative Importance-Equipment	Scale	No	Edit Delete Reports Answers: Detail Summary

[Return to Previous Page](#)

Figure 33.5 – Survey Pages/Questions

The first page (page "0") is the Scratchpad. This page is never displayed. It's a good place to put questions that you're working on and don't yet know on what page they will appear. Following the Scratchpad is one or more pages, each of which contains one or more questions.

Page Options

Click the **Add Page** button to add a page. You will see the following dialog.

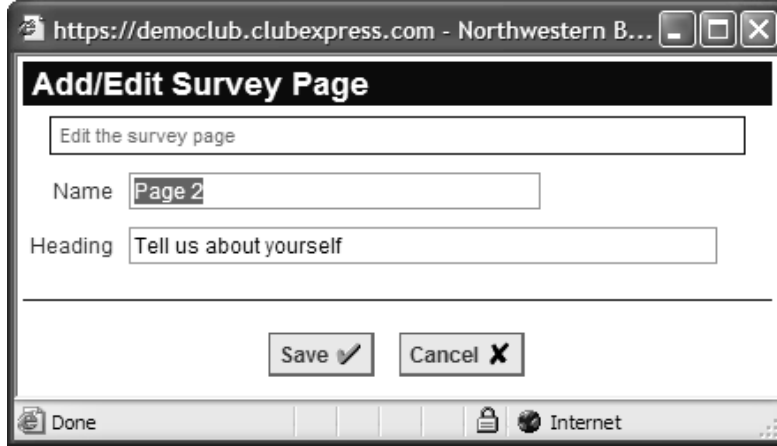


Figure 33.6 – Add Page

The page Name is used on the administration screen, while the page Heading is shown on the page itself when people take surveys. Click **Save** to save your changes and return to the main screen, or **Cancel** to return without saving. The **Edit** link in the page row of the grid allows you to modify these values.

Click the **Delete** link to delete a page. All questions on the page will be moved to the Scratchpad so that they are not lost.

Click the **Page Sequence** button to change the order of pages. The standard ClubExpress sequence dialog will be displayed.

Click the **Question Sequence** link in the page row of the grid to modify the order of questions within a page. This also displays the standard dialog.

PAGES / QUESTIONS - QUESTIONS

Click the **Add Question** button to add a new question. You will see the following dialog:

Northwestern Balloon Club - Windows Internet Explorer

Add/Edit Question

Question Name is used for reference only and is not shown to users. Questions can be answered in different ways, to the Question Type drop-down list allows you to specify the most appropriate type for each question. Different types allow different values to be entered; once you select a type, an appropriate Values option will be displayed.

Question Name:

Question Type:

Page:

Question:

Notes:

Min/Max:

Response Required: Yes No

Show Comments Box: Yes No

Save Cancel

Figure 33.7 – Add Question

1. The Question Name is used on the manager grid only; it is never shown to users.
2. Select the Question Type from the drop-down list. (Question types are described in detail below.) The screen will refresh to show additional options.
3. Specify the page on which the question should be placed. You can specify the Scratchpad, or any page you have defined.
4. The Question field contains the text that will be shown to users.
5. Some question types require that additional options be specified, including allowable values or a range or text to be used. In the above example, this is the Min/Max field. The prompt under the field will tell you what should be entered. If a semi-colon separates values, be sure not to put in extra spaces.
6. Most question types also support a “Response Required” option. Select “Yes” if an answer must be provided.

7. Some question types support an ‘Other’ field. Select “Yes” to display this option at the end of your specified options. You do not need to add ‘Other’ to your list; the system will do it for you. If the user selects this option, he or she will see a field where another response can be entered.
8. Some question types support a Comments box. Select “Yes” to display this box, so that survey respondents can add comments beyond their main answer.

Select **Save** to save your new question and return to the grid, or **Cancel** to return without saving.

Question Options

Click the **Edit** link to modify the question and its properties. If the survey is active and already has responses, you will not be able to modify the answer values.

Click the **Delete** link to delete the question completely. You will be asked to confirm this action. All responses will be lost. If you don’t want to lose responses, move the question to the Scratchpad by clicking Edit and changing the value in the Page field.

Answers

Click the **Detail** link to see the actual answers provided to that question so far. You will see a dialog similar to the following:

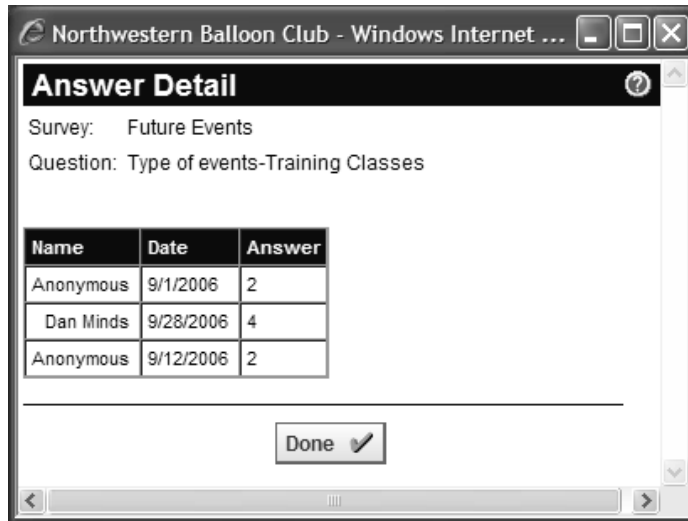


Figure 33.8 – Survey Question – Detail answers

Click the **Summary** link to see a summary or aggregate of the answers provided so far. This option is not available for all question types, only those where users choose one of a set of options (as opposed to free-form text.) You will see a dialog similar to the following:

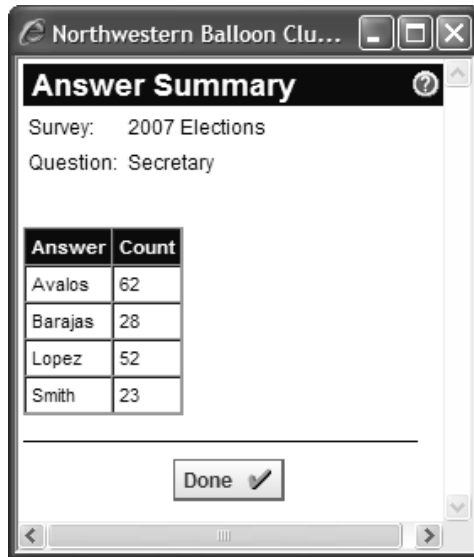


Figure 33.9 – Survey Question – Summary answers

Click the **Reports** link to see a list of available reports at the question level. You will see a dialog similar to the following:

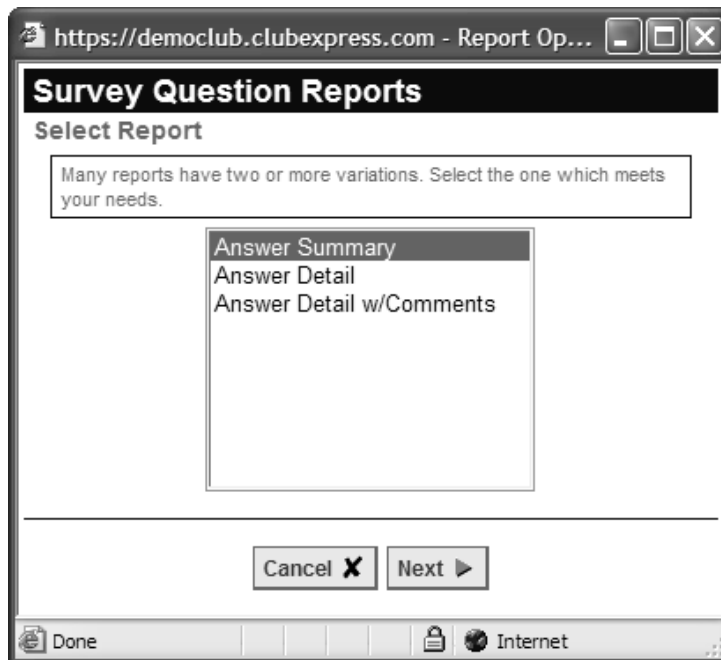


Figure 33.10 – Survey Question - Reports

Select the report and click **Next**. Then specify the output options and click **Run Report**. The report will display in a popup window.

QUESTION TYPES

The following question types are available for surveys:

Type	Display Format	Values	Other Box	Comments
Heading	As a question only. No response is allowed.			
Text	Text field	Enter a number from 1 to 100 representing the maximum text length (characters) allowed.		
Long Text	Large text block	n/a		
True/False	Radio button	Enter the “True” text, then a semi-colon, then the “False” text.		Yes
Date Year	Drop-down list showing 4-digit numbers.	Enter the lowest 4-digit year allowed, then a semi-colon, then highest 4-digit year allowed.		Yes
Date Month	Drop-down list showing the months of the year, spelled out.	n/a		Yes
Date Day	Drop-down list showing the numbers 1-31.	n/a		Yes
Date Full	Text field with a popup date-picker icon.	n/a		Yes
Integer	Text field	Enter the lowest integer allowed, then a semi-colon, then the highest integer allowed. Integers are whole numbers with no decimals.		Yes
Number	Text field	Enter the lowest number allowed, then a semi-colon, then the highest number allowed.		Yes
Select List	Drop-down list showing the choices in the order entered.	Enter the items to be displayed in the list, each on a separate line. Press <i>[Enter]</i> to move to the next line as you’re entering the items.	Yes	Yes

Type	Display Format	Values	Other Box	Comments
Checkbox List	Vertical list of checkboxes. Any and all can be selected.	Enter the items to be displayed in the list, each on a separate line.	Yes	Yes
Radio Buttons	Vertical list of radio buttons. Only one can be selected.	Enter the items to be displayed in the list, each on a separate line.	Yes	Yes
Multiple Text Boxes	Vertical list of text fields. Anything can be entered into each field.	Enter the number of text boxes to be displayed. A number will be shown before each box.		Yes
Scale (see the special section below.)	Horizontal list of radio buttons representing the “strength” of the respondent’s opinion.	Enter the text to be displayed above each radio button, each entry on a separate line. The number of lines determines the number of radio buttons.		

More about Scale Questions

Scale questions can have any number of levels, representing the strength of the respondent's opinion. They are also often displayed in groups, as shown in the following example:

How important are the following factors in your enjoyment of ballooning?				
	Unimportant	Neutral	Somewhat Important	Very Important
Safety	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Government regulation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Education	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Open skies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Equipment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Figure 33.11 – Sample Scale Questions

ClubExpress includes special functionality to display scale questions. If there's a group of scale questions together and they all have the same number of values, and the text for these values are the same for each question, then only one set of values will be displayed. But if the text is different in any way, they will be treated as separate questions with separate value blocks.

For example, in the Figure below, there is a typo in the value block for the last question, so it is separated out.

How important are the following factors in your enjoyment of ballooning?				
	Unimportant	Neutral	Somewhat Important	Very Important
Safety	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Government regulation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Education	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Open skies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Unimportant	Neutrall	Somewhat Important	Very Important
Equipment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Figure 33.12 – Sample Scale Questions with a typo

Entering Scale Questions All at Once

We have provided a shortcut to make it easier to add a group of scale questions. Click the **Add Scale Question** button. You will see the following dialog:

Scale Questions are displayed as a grid of radio buttons, with the columns usually representing preferences (for example, Disagree, Neutral, Agree) and the prompts representing the actual questions. This dialog allows you to create a series of scale questions where the column headings are all the same. These will be grouped into a single block of related questions. Once created, scale questions must be edited individually.

Question Name: Type of Events

Page: Scratch Pad (Not Shown)

Question: What types of events would you like to see in 2007?

Column Headings: Not interested, Somewhat interested, Neutral, Interested, Very interested, Will certainly attend

Enter each column heading on a separate line

Question Prompts: Training classes, Maintenance classes, Lectures, Guest speakers, Joint events with other clubs, Racing, Social events

Enter each question prompt on a separate line

Response Required: Yes No

Store Numbers: Yes No

Buttons: Save, Cancel

Figure 33.13 – Adding Scale Questions

This dialog allows you to enter the question, the column headings and the question prompts all at once. When you save the dialog, the “Question” becomes a heading question, the question prompts become the questions for each row of radio buttons, and the column headings become the values above each column of radio buttons, identical for each question.

In the above example, this dialog would create six questions on the page, the header question and five individual scale questions. The titles are also managed so that you can identify which question is which.

Entering Scale Questions One at a Time

Scale questions can also be entered like any other question. You should begin with a header question. Then enter the second question, specifying the values (column headings) you want to use for all of them. Keep the actual “question” text short, since it’s just a prompt to the left of the radio buttons, and the overall question is in the header.

You should copy the values into the Clipboard. Then when you specify each subsequent question, you can paste these values in so that they match.

This option is useful if you need to add a row to your scale question group. For example, if you want to add a row asking how important is “Competition”, you can do this by editing one of the existing questions and copying the values to the Clipboard. Then enter the new question with the same values and move it into the position you want.

Storing Values or Numbers

Scale questions allow you to pick whether the results are stored using the values (column headings) or using a number. This is done on the Add/Edit Question dialog. If you elect not to store numbers, the actual column heading for the chosen radio button is stored. If you elect to store numbers, the first value (column heading) is treated as 1; the second value is treated as 2; etc.

PREAMBLE AND POSTAMBLE

These options allow you to define a page at the beginning of the survey and one at the end of the survey. Select the appropriate option in the Survey Manager and you will see the ClubExpress advanced content editor. You can enter any text you want, including formatting, as well as images, links and other elements.

The system will place **Cancel** and **Next** buttons at the bottom of the preamble page, and **Back**, **Cancel** and **Finish** buttons at the bottom of the postamble page. A respondent’s answers are not written to the database until the **Finish** button is clicked.

RESULTS

Select this option to view detailed results for the survey. You will see a screen similar to the following:

Home • Surveys • Surveys Manager • Survey Results

Survey Results

This page shows a list of the responses to the survey. Click the "View Response" button to see the details of each response.

Future Events (3 responses)

◀ Prev Page 1 of 1 Next ▶ Export Response Details

Date	Name	Member?	View
9/1/2006	Anonymous	Yes	View Response
9/12/2006	Anonymous	Yes	View Response
9/28/2006	Minds, Dan	Yes	View Response

Return to Previous Page

Figure 33.14 – Survey Results

This grid lists each person who responded to the survey, including the date of the response. Click **View Response** to view his or her actual responses, listed in page and question order. Click **OK** to close the popup dialog.

Click **Export Response Details** to generate a CSV text file of all responses received to date. This file can be imported into Excel for massaging or analysis. You will be prompted to save the export to a local file.

REPORTS

Select this option to run reports at the survey level. You will see a popup dialog similar to the following:

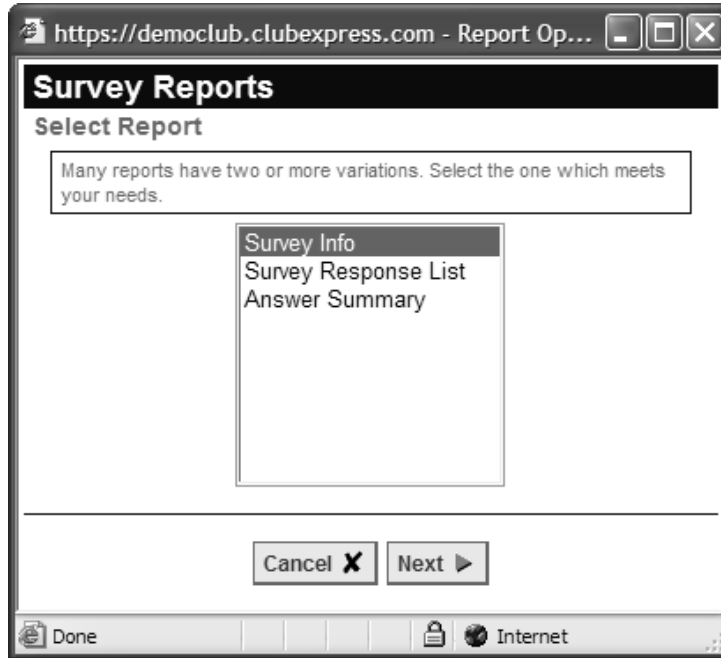


Figure 33.15 – Survey Reports

Select a report and click **Next**. Specify the report title and output format and click **Run Report** to open the report.

COPY

Select this option to copy a survey. The **Copy Survey** dialog will be displayed. This is basically the same dialog as the Add/Edit Survey dialog, allowing you to change the properties of the survey before it's copied. Be sure to specify a different title for the survey so that you can tell the copy from the original. Note that survey responses are not copied, just the pages and questions.

DELETE

Select this option to delete the survey, its pages and questions and all responses. You will be asked to confirm this action. There is no Undo; once a survey is deleted, it's gone.

Chapter 34 – Modules – Storefront

INTRODUCTION

The ClubExpress Storefront is a powerful E-Commerce module that allows clubs and associations to sell merchandise through their websites. It includes the following admin features:

- Define any number of products;
- Organize products into categories;
- Products can have variations based on color, size and other criteria;
- Products can consist of digital content which is downloaded;
- Product images, including click to show a larger image;
- Manage product availability and visibility;
- Define different pricing for members and non-members;
- Define “special” pricing;
- Track inventory of products on-hand;
- Manage orders and fulfillment, including backorders and partial fulfillment;
- Control shipping and handling fees and sales tax;
- Full integration with ClubExpress transactions and payments;
- Full integration with the ClubExpress security model;
- Reports.

On the public/member side of the website, the module includes the following features:

- Featured products, Specials, Search by category;
- Display product title, photo, description, variations;
- Display appropriate prices based on whether the user is logged in;
- Add to shopping cart;
- View shopping cart, adjust quantities, remove product;
- Checkout process;
- Gift option;
- Shipping address and shipping method options;
- Full integration with ClubExpress payment page;
- For digital content, a “download bank” to download paid products.

Important Note 1 – Merchant Account

ClubExpress includes a built-in merchant account which allows clubs and associations to process credit cards through the website for memberships, event registrations and donations. When you use the built in merchant account, “ClubExpress 8664572582” (our toll-free number) appears on user statements. The funds flow to our bank account and then, three times a month, we use a direct bank-to-bank transaction to remit collected funds to you and to withdraw the credit card fees associated with these transactions. We can also distribute these funds to different bank accounts.

Clubs have the option of using this built-in merchant account or obtaining their own merchant account and configuring the system to use it instead. When you use your own merchant account, your club or association name appears on user statements and the funds flow directly to your bank account every day (two business days after the transaction.) The fees are withdrawn directly from your bank account. With this option, we cannot distribute these funds into different bank accounts for you because we never see them.

However, our policy is that if you want to enable the Storefront module, you must have your own merchant account. Because the Storefront is dealing with tangible goods, ClubExpress cannot carry the credit card risk associated with shipments, backorders, disputes, returns and chargebacks.

ClubExpress can help you set up a merchant account. See the following page on our website: <http://www.clubexpress.com/merchantaccount>. Or you can set up your own merchant account, as long as the payment gateway associated with this account is Authorize.Net. Many merchant processors can work with Authorize.Net; just ask when you are setting up the account.

Important Note 2 – “Test” Mode vs. “Live” Mode

When you first activate the Storefront, it will be in “Test” mode. This mode allows you to configure the support and lookup tables, add products and inventory items, upload images, create orders with lineitems, view the shopping cart and proceed through the Checkout process to the final page before payment. However, in test mode, transactions are not created and you cannot complete and pay for orders.

In order to move into “Live” mode, you need to call ClubExpress. The criterion for doing this is quite simple: as noted above, you need to have your own merchant account.

Orders created while you are in test mode can be deleted so when you move into live mode, you start with a clean slate.

VIEWING AND PURCHASING PRODUCTS

When users open the storefront, they will see a screen similar to the following:

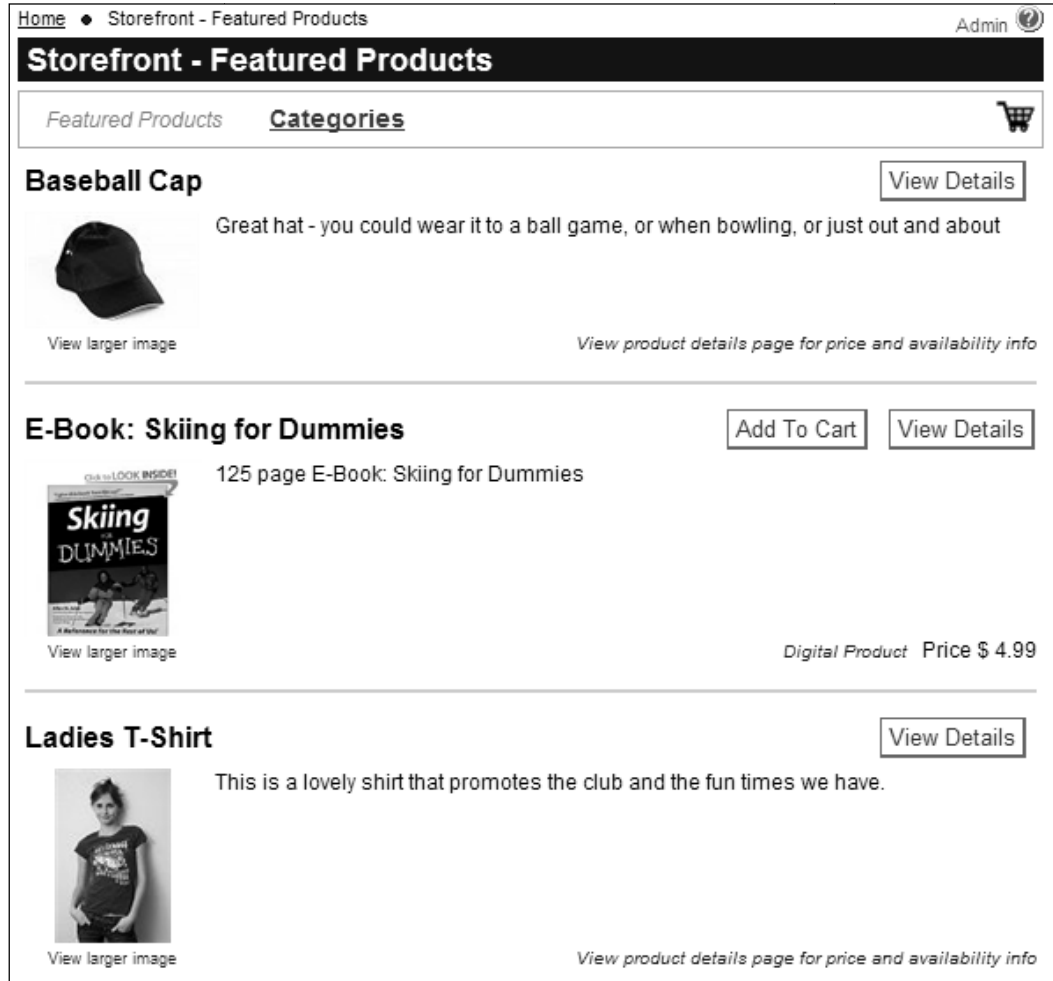


Figure 34.1 – Storefront opening screen

A full storefront displays featured products, specials and categories, although the initial opening screen may be different for your club or association. There is also a “limited” storefront option that just shows a list of products with a separate list of specials.

Each product includes a title, photo, short description and price or price range if the product has variations. Note that prices may be different for members and non-members; members must login to receive member pricing. Click the **View Details** button to display more information about the product, including product variations (for example, clothing in different sizes and/or colors.)

If the product has no variations, click the **Add to Cart** button.

The Categories list has a slightly different format, shown below.

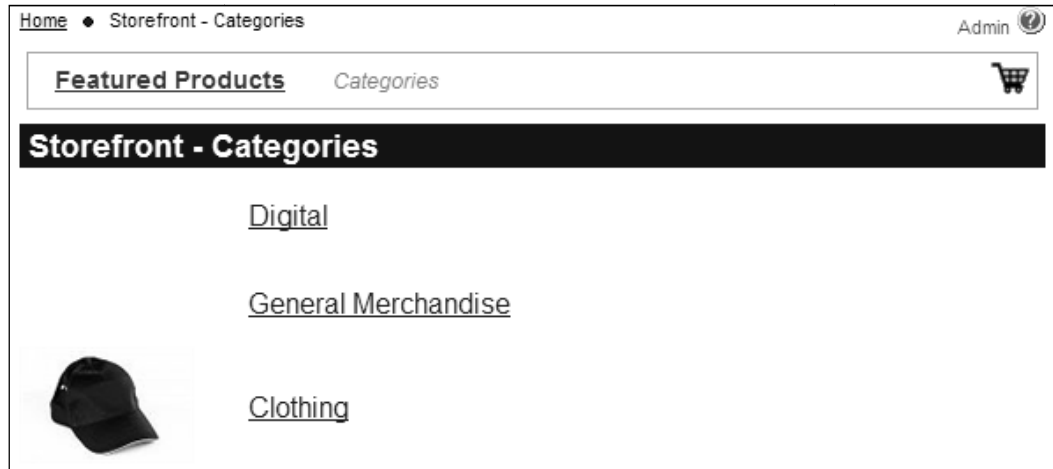


Figure 34.2 – Storefront Categories

Select a category to see a list of products in that category.

Product Details

When you click the **View Details** button, you will see a screen similar to the following:

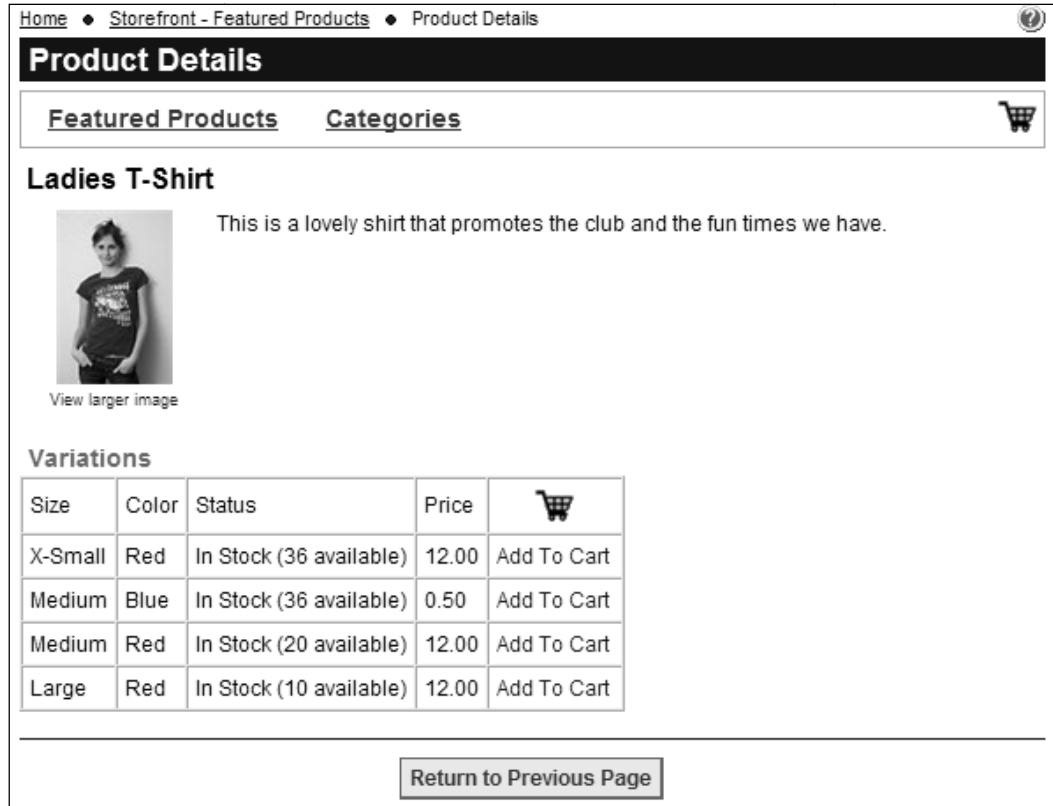


Figure 34.3 – Product Details

This screen shows the product title, photo and a full description. The pricing panel is different based on the type of product and whether it has variations.

- For a product with no variations or for a digital product that is downloaded rather than shipped, the price only is shown.
- For a product with size variations only, or color variations only, or both size and color, or other types of variations, the grid shows all possible configurations that have been configured and the option to order a specific variation.

Note that prices may be different for members and non-members; members must login to receive member pricing.

When you click the **Add to Cart** button, the selected product is added to your shopping cart and the cart is displayed.



Shopping Cart

Click the shopping cart icon to view your cart. You will see a screen similar to the following:

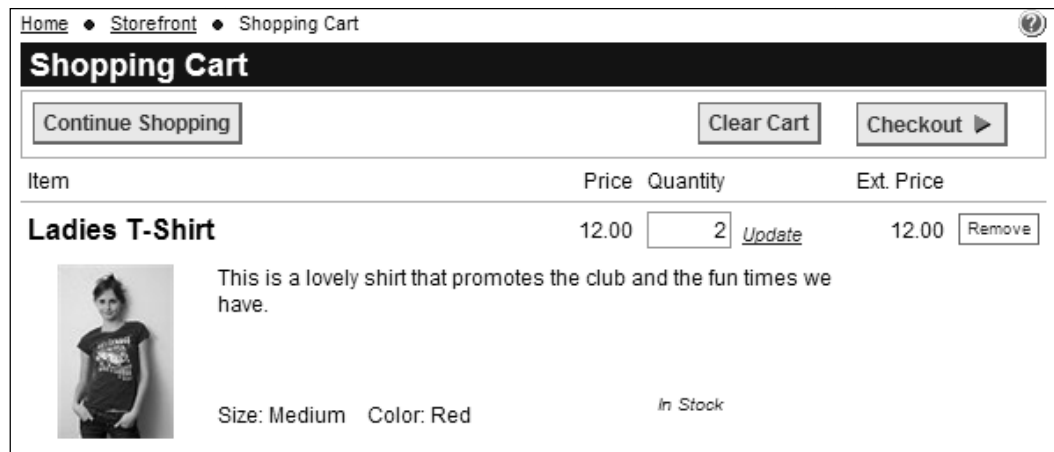


Figure 34.4 – Viewing the Shopping Cart

Buttons at the top of the shopping cart allow you to continue shopping, cancel the process (which empties your cart and returns you to the Home page) or begin the Checkout process.

Each product in your shopping cart is shown with its title, photo and short description, together with the variation selected. The price is shown together with a Quantity field and extended price. (Note that prices may be different for members and non-members; members must login to receive member pricing.) To change the quantity ordered, edit the number and click the Update link. To remove an item from your shopping cart, click the Remove link.

For digital content that is downloaded rather than shipped, the Quantity field is grayed out; you cannot buy multiple copies of a digital product.

CHECKOUT

When you click the **Checkout** button, you will see a screen similar to the following:

Home • Shopping Cart • Checkout

Checkout

Please enter your contact information, then click the "Continue with Checkout" button. On the next page, you will be able to use this address for shipping, or ship to different address if you wish.

Association Member? [Login to check out with member pricing](#)

Have you previously placed an order or are you on our mailing list? [Click here to search](#)

In addition to your name, please enter your address, phone number and email address. This will allow us to contact you if necessary.

First Name

Middle Initial

Last Name

Address 1

Address 2

City

State/Province

Zip/Postal Code

Country [Show All Countries](#)

Phone

Email Address

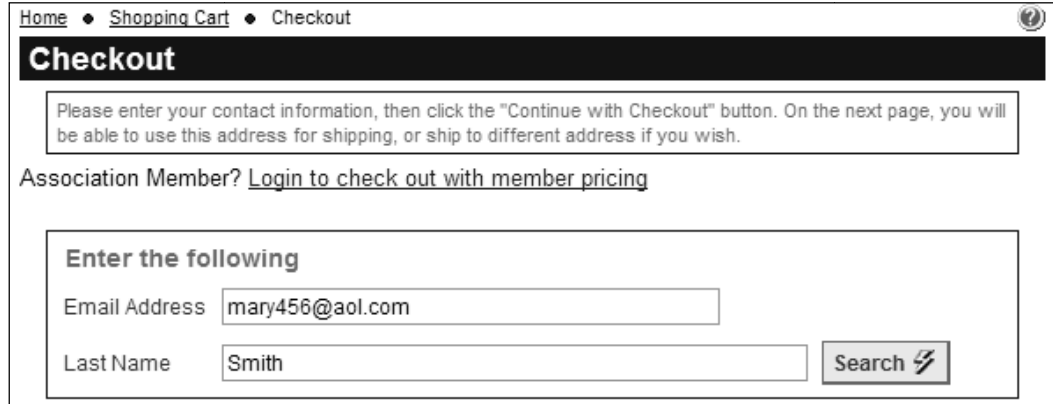
Organization

Title

Figure 34.5 – Checkout for non-members

If you are a member but have not yet logged in, this screen allows you login to continue the checkout. Pricing may change once you have logged in. (If you are a member who has already logged in, this screen is skipped.)

If you are not a member but have previously ordered products, click the link to find yourself in the database. The system will display a screen similar to the following:



The screenshot shows a web browser window with the following content:

- Navigation menu: Home • Shopping Cart • Checkout
- Section header: Checkout
- Instructional text: Please enter your contact information, then click the "Continue with Checkout" button. On the next page, you will be able to use this address for shipping, or ship to different address if you wish.
- Text: Association Member? [Login to check out with member pricing](#)
- Form titled "Enter the following":
 - Email Address: mary456@aol.com
 - Last Name: Smith
 - Search button with a lightning bolt icon

Figure 34.6 – Find your non-member record

Enter your email address and first name and click **Search**. If your information is found, the name and address fields will be populated.

If your information was not found or if you have not previously ordered from the storefront, you will next enter your contact information.

Click **Continue with Checkout** to proceed to the next page or **Return to Cart** to return to your shopping cart without checking out. You can also click **Cancel** to cancel your checkout and your shopping cart completely.

Checkout Final Screen

When you click **Continue with Checkout** (or if you are a member already logged in), the following screen is displayed:

Home • Shopping Cart • Checkout

Checkout

Shipping Info

Shipping Method

Send To

Shipping Address

Name

Organization

Title

Address 1

Address 2

City

State/Province

Zip/Postal Code

Country

Gift

Is this a gift? Yes No

Gift Message

Order Summary

Base Cost	13.50
Sales Tax	0.57
Shipping & Handling	8.00
Final Cost	22.07

Figure 34.7 – Checkout final screen

Specify a shipping method from among the available methods defined by your club and association. Once this is done, the order summary panel will be updated to reflect the shipping and handling cost, any sales tax and the total cost for this order. Note that sales tax may be different for different types of products and may or may not apply based on your state or country of residence.

Select a **Send To** option:

- Members can select their primary address or their alternate address, or enter a new shipping address from scratch (for example, for a gift.)

- Non-members can use the address entered on the previous screen or enter a new shipping address from scratch.

Specify if this is a gift and a gift message. The message will be added to the packing list that is printed and included in the box.

Click **Continue to Payment** to complete your order and proceed to the standard ClubExpress payment page. You can also click **Cancel** to cancel your checkout and your shopping cart completely.

Payment Screen

When you click **Continue to Payment**, you will see a screen similar to the following:

Home • Make Payment

Make Payment for Dan Ehrmann

The list below shows outstanding payments due. Use the checkboxes to select which payments you wish to make. Then, make a choice in the "Select Payment Method" dropdown list. If you elect to pay by credit card, enter the required information, and press the "Submit Payment" button. Please allow a minute or so for your transaction to complete.

If you prefer to pay by check, select the "Print Invoice and Send Check" option and press the button with the same name. A printable version of the page will be displayed which includes instructions on how to make out your check and where to mail it.

Fields marked require an entry.

<input checked="" type="checkbox"/> Purchase Product (4/8/2009) Due \$ 22.07 Pay \$ 22.07
Baseball Cap (Small) 13.50
Sales Tax 0.57
Shipping/Handling 8.00
Transaction Total: 22.07

Total Selected For Payment **\$ 22.07**

Select Payment Method

Review the payments due, and select the items you wish to pay for now. Then, select a payment type and follow the instructions provided.

Refund Policy: The refund policy is set by Big Bend Middle School PTA. If refunds are available, requests must be directed to Big Bend Middle School PTA - they cannot be handled by ClubExpress.

Figure 34.8 – Payment Screen

Each order is a single transaction. This transaction will have multiple line items, one for each item in the order, as well as items for shipping/handling (based on your chosen shipping method) and sales tax (if charged).

Select a payment method then follow the instructions to enter the required information and submit the payment for processing. If you pay immediately by credit card, your order is flagged as “Ready to ship”. If you choose to print an invoice and mail a check, your order cannot be shipped until the check is received and recorded in the system.

DOWNLOADING DIGITAL CONTENT

If you have ordered digital content, the confirmation email you receive will include a link to your **Download Bank**. This is a list of documents that you can download. It is also available as a link from your member Profile. You will see a screen similar to the following:

The screenshot shows a web interface titled "Download Bank". At the top, there are navigation links: Home, Member Profile, and Download Bank. Below the title is a black header with the text "Download Bank". A text box explains that users can click double arrows to view details and "Download" links to download documents. Below this is a table with columns for Name, Status, and Links. The first row shows "Skiing for Dummies" with a status of "Available" and links for "Download" and "Edit". A detailed view for "Skiing for Dummies" is shown below, including a description, format, file size, days remaining, and download count. The second row shows "Skiing for Dummies Supplement" with a status of "Available" and links for "Download" and "Edit". At the bottom, there is a "Clear" button and a "Return to Previous Page" button.

Name	Status	Links
⌵ Skiing for Dummies Description 125 page digital book for downloading. Format Unknown File Size 73,672 Days Remaining 7 Downloads 0	Available	Download Edit
⌵ Skiing for Dummies Supplement	Available	Download Edit

Figure 34.9 – Download Bank

Click the **Download** link to download a document. Click the double-arrow on the left of the title to view details of a document. Click the **Clear** button to remove any document from the list that has already been downloaded at least once or which can no longer be downloaded.

STOREFRONT MANAGER – PRODUCTS

There are two ways to manage Storefront Products and Orders:

1. Administrators only can click the **Admin** link beside the Storefront module in the Built-In Module Index screen.
2. When viewing the main Storefront page, coordinators and administrators can click the **Admin** link in the top right corner of the screen.

The Storefront module has two main admin screens, one for Products and the other for Orders. You can specify which should be displayed on the Storefront Options page. The Storefront Manager – Orders screen is described on page 508 below. The Storefront Manager – Products is shown below:

Home • [Storefront](#) • Storefront Manager - Products

Storefront Manager - Products

Specify filter parameters and click the "Search" button to display matching products, or select an administrative option from the buttons on the right.

Search

Category:

Title:

Show: Featured
 Dropped

Which Products: Physical & Digital
 Physical Only
 Digital Only

Search Results

Title	Type	Status	Featured	Updated	Maintain
Ladies T-Shirt	Physical	Active	Yes	04/07/2009	Edit Categories Inventory Reports
Baseball Cap	Physical	Active	Yes	04/07/2009	Edit Categories Inventory Reports
Membership Kit	Physical	Active	Yes	04/07/2009	Edit Categories Inventory Reports
Member List	Physical	Active	Yes	04/07/2009	Edit Categories Inventory Reports
E-Book: Skiing for Dummies	Digital	Active	Yes	04/07/2009	Edit Categories Documents Reports
Men's T-Shirt	Physical	Active	Yes	04/07/2009	Edit Categories Inventory Reports

Figure 34.10 – Storefront Manager – Products

Specify the appropriate options in the Search panel and click the **Search** button. You can filter your product list by category, title, and product type, and optionally show only featured and dropped products.

The results grid shows matching products, including the title, type, status, last update and whether this is a “featured” product. Featured products appear on a special page on the user side of the storefront. (You can also create “specials” but this is done at the Inventory level.)

In the Maintain column, you can perform the following tasks:

- Edit a product;
- Assign a product to one or more categories;
- Specify inventory for physical products;
- Specify documents linked to digital products;
- Run reports on individual products.

Clicking the **Configure** button displays a drop-down menu of configuration choices.

Configure – Product Categories

Click the **Configure – Product Categories** option to the right of the search panel to see the master list of product categories. Once this list is created, you can assign products to one or more categories to help users find products.

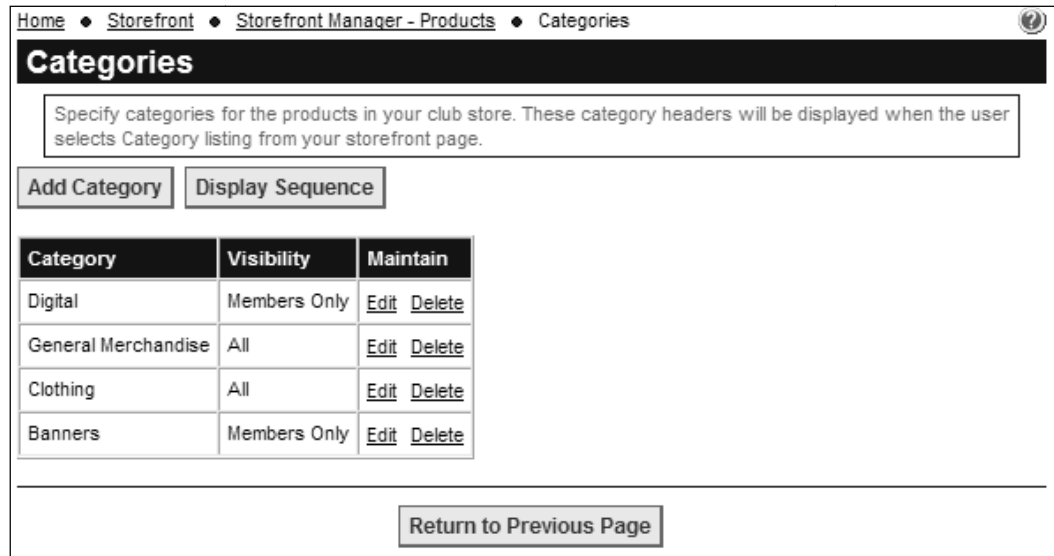


Figure 34.11 – Product Categories

Click the **Add Category** button to create a new category. The following screen is displayed:

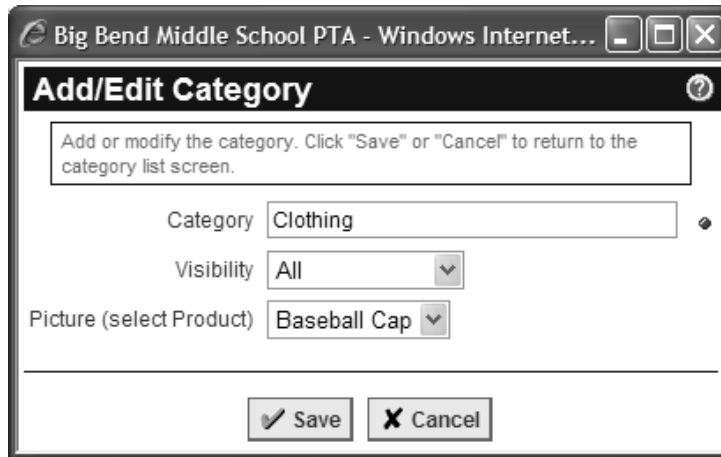


Figure 34.12 – Add/Edit Product Category

Enter a category and its visibility, then click **Save** or click **Cancel** to return without saving.

Click the **Edit** link to edit a category and visibility, or the **Delete** link to remove a category. You can also click the **Display Sequence** button to show the standard ClubExpress sequence dialog, to control the order in which categories are displayed on the Category View screen.

Tax Rates

Click the **Configure – Tax Rates** option to display a list of sales tax rates that apply in your jurisdiction. Some states will require that you collect sales tax on some or all items, and these rates may be different based on the type of item. For example, some states have a different sales tax rate for clothing or food items.

Important Note: The system will charge sales tax based on what you configure on these screens and on the Product add/edit screens. You are responsible for determining the correct sales tax rates to charge and for actually remitting collected taxes to the appropriate state and local authorities.

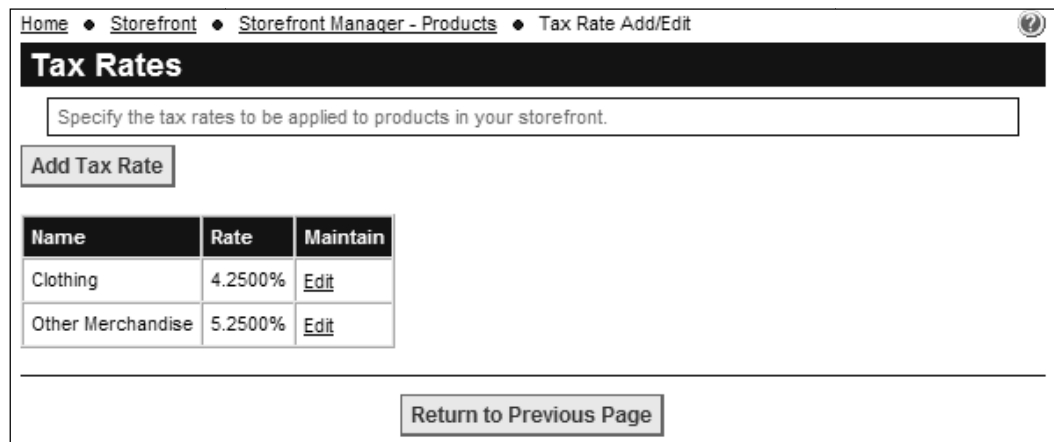


Figure 34.13 – Tax Rates

Click the **Add Tax Rate** button to create a new tax rate. You will see the following screen:

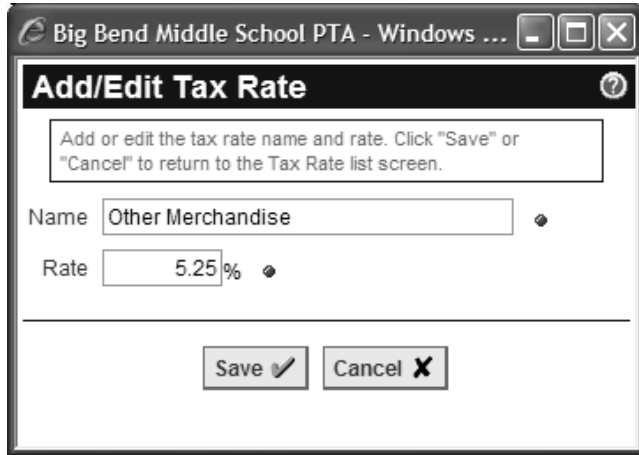


Figure 34.14 – Add/Edit Tax Rate

Enter a name for this tax rate and the percentage to charge, then click **Save** to save your changes. Or click **Cancel** to close the dialog without creating a new tax rate. Click the **Edit** link to modify an existing tax rate, or the **Delete** link to remove a tax rate if it was not being used.

Shipping Methods

Click the **Configure – Shipping Methods** option to add or modify shipping methods. You can create any methods that are appropriate for your organization. These might include methods that vary based on the dollar size of the order, or flat rates based on USPS cartons. Don't forget to include methods such as "Pick Up from the club office" that don't actually involve handing a package over to a delivery service. ClubExpress does not calculate shipping methods based on weight or package size, so you should generally keep the available shipping methods simple.

Note that "Handling" can be specified as a separate fee under Storefront Options. You have the option of charging a flat fee to pick and pack the order, or for club overhead. The handling fee is added to the chosen shipping fee to arrive at a total fee for shipping and handling on user invoices.

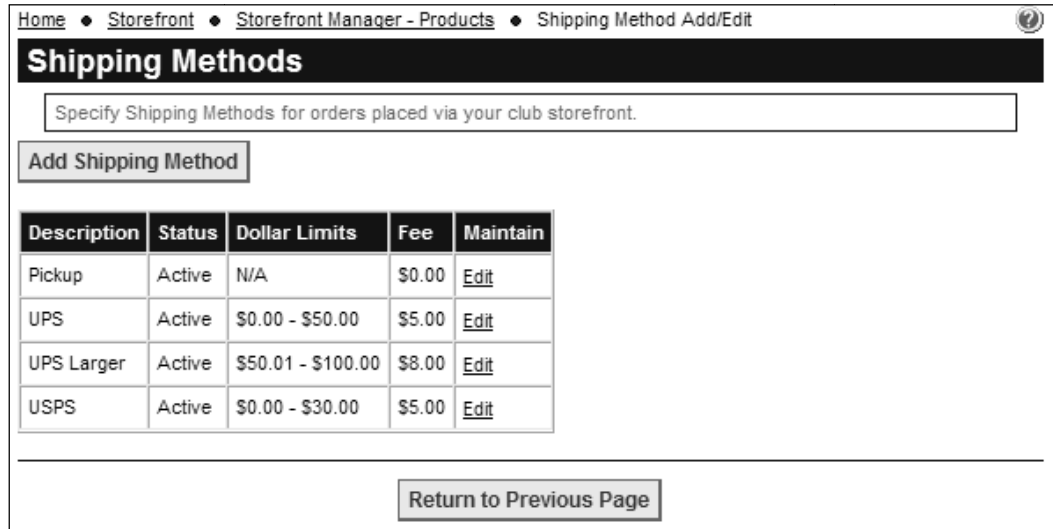


Figure 34.15 – Shipping Methods

Click **Add Shipping Method** to create a new shipping method. You will see the following screen:

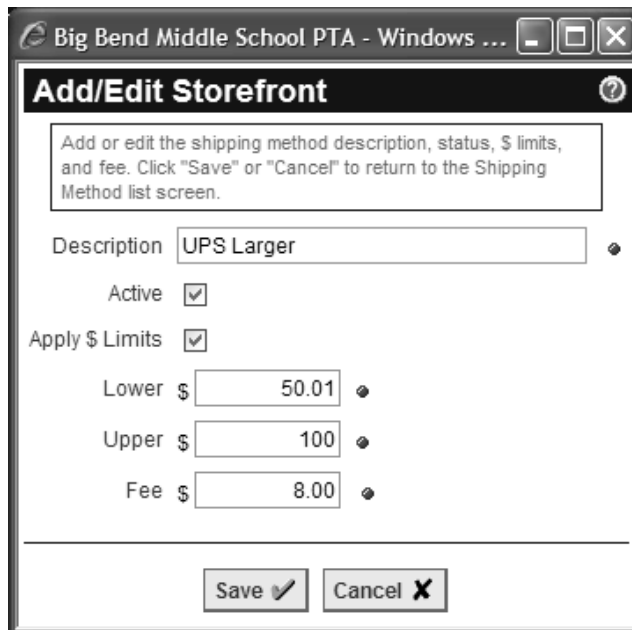


Figure 34.16 – Add/Edit Shipping Method

Enter a description of this method and check the Active box. If the method varies based on the dollar value of the order, check the appropriate box and specify the upper and lower limits. Specify the fee for this method and click **Save** to save your shipping method. Click **Cancel** to return without saving.

Click **Edit** to modify an existing shipping method or **Delete** to remove a shipping method. (Note that this deletion will not affect orders that have already been placed (both shipped and not-yet-shipped.) However, you can change the shipping method for orders not-yet-shipped.

STOREFRONT OPTIONS

Click the **Configure – Storefront Options** choice to modify general configuration settings for the storefront module. You will see the following screen:

Home • Storefront • Storefront Manager - Products • Storefront Options

Storefront Options

This screen shows the club's storefront options. We have defaulted the settings to those that are most commonly used.

General

Charge Sales Tax

Association Handling Fee

Allow Backorders

Allow Partial Fulfillment

Display

Order Button Text

Show In-stock Items Only

Show Quantity Available

Catalog Size Small Large

A small catalog should have no more than 10-15 products (though no limit is enforced). It is simpler for your users - featured products, product searching, and category browsing are not needed, and so are not available on the site (product specials are available).

Catalog Pages

Page	Show	Start Page
Featured Products	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Specials	<input type="checkbox"/>	<input type="radio"/>
Categories	<input checked="" type="checkbox"/>	<input type="radio"/>

Digital Content

Download Time Limit days

Figure 34.17a – Storefront Options (top part)

The following options can be configured:

General

- Specify if sales tax should be charged, and if so, to everyone or just to members in the same state as the club's official address.

- Separate from shipping costs, you can also specify a flat “handling” fee that will be applied to each order. This fee covers the club’s cost for picking and packing the order, or for other types of overhead.
- Check the **Allow Backorders** box if you allow users to order backordered products. If your storefront has frequent turnover and you often re-order products, you might allow orders to be placed for products which are not currently in stock.
- Check the **Allow Partial Fulfillment** box if orders can be shipped in more than one package. Uncheck it if everything must be in stock before an order can be shipped.

Display

- Specify the text of the button that adds a product to the user’s cart.
- Check the **Show In-stock Items Only** box to hide backordered products. Note that you can configure the system to show backordered products but not to allow them to be added to shopping carts, although this is generally not recommended.
- Check the **Show Quantity Available** box to show users how many of a specific product are in stock. The default is to hide this information.
- Select a **Catalog Size** and specify which pages should be displayed and which page should be the opening page.
 - Small catalogs show an “All Products” page and can optionally show a “Specials” page. Featured products and product categories are ignored for small catalogs.
 - Large catalogs optionally have Featured Products, Specials and Category pages and you can define which of these should be the opening page. (In a future release, large catalogs will also have a search option to help users find products.)

Digital Content

- Configure a default **Download Time Limit** (in days). Many organizations limit how long a digital product is available in a user’s Download Bank.

The Storefront Options page continues below.

Product Defaults

Available to Non-Members

Has Variations Size Color Other

Financial Account

Tax Rate

Has Quantity Limit

Administration

Starting View Products
 Orders

Storefront Contact Admin Michelle True, CPA [Select Member](#) [Remove](#)

Notify By Email When An Order Is Received??

Non-Member Category

Other Financial Accounts

Shipping

Sales Tax

Figure 34.17b – Storefront Options (bottom part)

Product Defaults

These options control the defaults for each new product that you create. Each of these settings can then be customized at the product level. By default...

- Are products available to non-members?
- Do products have variations and, if so, the types of variations?
- What financial account should be used for Storefront product purchases?
- What tax rate should apply to each product?
- Should a quantity limit be applied (max. number of a product that a user can order. For some high-demand products, you might impose a quantity limit of 1 or 2.) Specify no limit, a limit for everyone, or a limit for non-members only.

Administration

- What is the starting view when the Admin link is clicked: the Products manager or the Orders manager?

- Should a notification email be sent whenever an order is placed and, if so, to whom?
- When non-members place storefront orders, what is the default category in the non-member database where their information is stored?
- What financial accounts should be used for shipping and handling and for sales tax? If you have QuickBooks enabled, this information will flow through to the appropriate QuickBooks accounts.

Click **Save** to save your changes and return to the Storefront Manager screen, or **Cancel** to return without saving.

REPORTS

Click the **Reports** button to display the standard ClubExpress reports dialog. You will see a list of available reports that apply across multiple products. Many of these reports have additional filtering options, as well as the standard output options (PDF, HTML, Word and Excel.)

ADD PRODUCT

Click the **Add Product** button to add a new product to your storefront. You will see the following screen:

Home • Storefront • Storefront Manager - Products • Add/Edit Product

Add/Edit Product

Use this screen to specify the product's characteristics. The values you enter determine how the product will appear in your storefront.

Partial SKU

Title

Short Description

Description

QuickBooks Item Name

Weight Ounces

Status

Has Variations Size Color Other

Featured

Pricing

Prices set at the Inventory level

Member Price \$

Available to Non-Members

Non-Member Price \$

Financial Account

Quantity

Has Quantity Limit

Photo

Current Photo: [Sweatshirt.jpg](#) Keep? Replace? Delete?

Figure 34.18 – Add Product

The following information can be entered for each product:

- **Partial SKU** (Stock Keeping Unit, the standard term for a product ID). If this product has inventory items, this SKU will be placed in the inventory SKU field so that you can append or modify the SKU for each inventory item.
- **Title** – this field is required.
- **Short Description** is used on the index, search results and shopping cart pages. **Description** is used on the product details page.
- **Weight** can be specified in ounces. For now this information is not used but in future, it will be used to calculate shipping based on the total weight of the order.
- **Status** is one of the following values:

Being Defined	The product and its inventory items are still being built. It will not appear in the storefront.
Test	Active in the storefront for admins only. Use this option to review the product in the storefront before making it available to be ordered.
Active	Available to everyone to be ordered.
Inactive	Shown on the admin side of the module only. Cannot currently be ordered.
Dropped	The product is not normally shown unless the “Dropped” box is checked. This is the equivalent to a “deleted” option, except that products cannot be deleted because there may be order history.

- **Has Variations** controls whether the product varies by size, color and/or other factors. For example, a club golf shirt might be available in multiple sizes and colors, and in women’s and men’s styles. If you check the main box you can then check options for size, color and other. These options can then be defined at the Inventory level.
- Check the **Featured** box if this is a “featured” product. Featured products have their own page in large storefronts and you can make this the opening page in the storefront to give these products more prominence.

Pricing

You can set prices at the product level or at the inventory level.

- If the box is unchecked, the price you specify will apply to all inventory items within this product.
- If you check the box, the system allows you to enter a default price that will be used for each inventory item. (For example, perhaps all t-shirts cost the same except for the XL, which is \$2 more expensive.)

You can also configure whether the product is available to non-members and the price for non-members (which is often different than the member price.)

Specify the tax rate from the list of rates that you previously entered. Then specify the financial account into which orders for this product should be aggregated.

Quantity

You can specify whether to enforce a maximum quantity and also whether to apply this limit to everyone or just to non-members.

Photo

Click the **Browse** button to select a photo from your local hard disk to upload into the system. The photo will be automatically resized so the maximum dimension is 400 pixels and a thumbnail version of the photo will also be generated automatically.

Once a photo has been uploaded, the Photo panel changes to the following:



Photo
Current Photo: TShirt.jpg <input checked="" type="radio"/> Keep? <input type="radio"/> Replace? <input type="radio"/> Delete?

Figure 34.18a – Edit Product – Photo panel

Click the image link to view the photo, then choose to keep, replace or delete the photo. Click **Save** to save your new product and return to the Products manager screen, or **Cancel** to return without saving.

On the Storefront Manager – Products screen, in the grid of products, click the **Edit** link to modify these properties for an existing product.

Understanding Product Variations

In the ClubExpress storefront, you don't need to define separate products for each size or color or variation of a basic product. Instead, the storefront allows you to group these variations under a single product, with each variation treated as an "inventory" item. Here are three examples:

1. Your club or association offers a club t-shirt in different sizes but one basic design and color. This is one product with a "Size" variation only. On the inventory screens, you can specify the available sizes from a master list, with an inventory count and price for each size (the largest sizes are often more expensive.)
2. Your club or association offers a club t-shirt in different sizes and colors. This is also one product with both "Size" and "Color" variations. On the inventory screens, you will specify the available size and color combinations from master lists, with an inventory count and price for each combination.
3. Your club or association offers a club t-shirt in different sizes and colors, and in a style/cut for men and women. This could still be one product with all three variation options. Alternatively, you could define separate products for the men and women variations then define categories showing "Products for Men" and "Products for Women".
4. Your club or association creates a monogrammed folder for members to carry to meetings. If it's available in leatherette and vinyl styles, this could be configured as one product with two "Other" inventory variations, each with its own description and price.

Understanding Pricing

The ClubExpress storefront supports product pricing at multiple levels:

- For products without inventory variations, pricing is defined at the product level.
- For products with inventory variations, pricing can be defined at the product level and will apply to each inventory item, or you can specify pricing at the inventory level, different for each variation.
- Products can have the same prices for members and non-members, or you can specify different pricing. (You can also control availability; some products may not be available to non-members at all.) The system will display the appropriate prices based on whether the user is logged in.
- "Featured" products exist at the product level. If you define a product as "featured", it will appear on the Featured page of the storefront, often the first page when the module is displayed.

- “Specials” exist at the inventory level. You can specify special pricing for individual inventory items, then decide whether the regular (member or non-member) or special price (member or non-member) should be used. Special pricing is often used to clear out excess inventory, if you ordered too many of a specific color, size or other variation. There is also a “Specials” page in the storefront to display products with a special price.

Product Categories

On the Storefront Manager – Products screen, in the grid of products, click the **Categories** link to assign a product to one or more categories. You will see a screen similar to the following:

Home • Storefront • Storefront Manager - Products • Product Categories	
Product Categories for Ladies T-Shirt (red)	
Specify categories for your product.	
Add Category	
Category	Maintain
Clothing	Remove
Return to Previous Page	

Figure 34.19 – Assigning a product to categories

Click **Add Category** to add a category to the product. You will see a popup form that allows you to select a category. Click **Save** to save your selection and return to the list, or **Cancel** to return without saving.

Click the **Remove** link to remove a category from the list.

Product Inventory

On the Storefront Manager – Products screen, in the grid of products, click the **Inventory** link to see a list of inventory items for a product. You will see a screen similar to the following:

Home • Storefront • Storefront Manager - Products • Product Inventory

Product Inventory for Ladies T-Shirt

Specify filter parameters and click the "Search" button to display matching inventory, or press the Add button to add an Inventory record.

Show Available Not Available Inactive Dropped

Search Results

SKU	Status	Size	Color	Quantity	Special	Maintain
LTSR02	Available	X-Small	Red	36	No	Edit
LTSB03	Available	Medium	Blue	36	Yes	Edit
LTSR03	Available	Medium	Red	20	No	Edit
LTSR04	Available	Large	Red	10	No	Edit

Figure 34.20 – Product Inventory

Select the appropriate Search options and click the **Search** button to display matching inventory items for this product. Click the **Add Inventory** button to add an inventory item for a product. You will see the following screen:

Home • Storefront • Storefront Manager - Products • Storefront - Ladies T-Shirt • Inventory Add / Edit

Add/Edit Inventory

Use this screen to specify inventory information for your product. The values you enter determine how the product variations will appear in your storefront.

Basic Information

SKU

Size

Color

Weight Ounces

Quantity

Quantity in Carts

Reorder Point

Status

Allow Backorders

Pricing

Regular prices are set at the Product Level

Use special price instead

Special Member Price \$

Special Non-Member Price \$

Figure 34.21 – Add/Edit Inventory

If you specified product defaults, these will be pre-entered in the various fields. You will also see different fields based on the variations you specified at the product level: size, color, and/or other. The following options are available:

Basic Information

- Enter a unique SKU for this inventory item. It may begin with the product’s partial SKU or you can specify a completely different value.
- If this product has “size” properties, select a size from the master list of sizes. If you don’t see the size you need, contact ClubExpress and we can add it to the master list.
- If this product has “color” properties, select a color from the master list of colors. If you don’t see the color you need, contact ClubExpress and we can add it to the master list.

- If this product has “other” properties, enter a description in the field.
- If the weight of this product is different from the default, enter a value in ounces.
- Enter the quantity on hand. You can also adjust the quantity in carts although you will generally leave this field blank and allow it to be managed by the system.
- Specify the reorder point. When available inventory falls below this level, a red “Renew” will appear in the Inventory grid to indicate that this item should be reordered.
- Specify the Inventory item status from the following options:

Available	This inventory item will be displayed in the storefront and can be ordered. Note that the system will separately track whether an inventory item is in stock or whether it’s backordered, based on the quantity.
Not Available	This inventory item is not currently available but you may want to show it in the storefront. It cannot be ordered.
Inactive	The inventory item is not currently available and it should not be shown in the storefront. But admins will see it.
Dropped	The inventory item is not normally shown unless the “Dropped” box is checked. This is the equivalent to a “deleted” option, except that items cannot be deleted because there may be order history.

- Check the **Allow Backorders** box if users can order available inventory items that are not currently in stock.

Pricing

The pricing panel will vary based on whether the product can be ordered by anyone or by members only. Specify the price(s) as indicated.

You also have the option of charging a “special” price for this inventory item. For example, if you ordered too many XS sweatshirts or red hats, you can clear them out at a special price. Check the box and specify the price(s) as indicated.

Both the small and large catalogs feature a “Specials” page where products with special inventory items are listed. When you drill into such a product, the items being sold at a special price will be listed alongside items being sold at the regular price.

Click **Save** to save your changes and return to the Product Inventory screen, or **Cancel** to return without saving.

Click the **Edit** link to modify the properties of a specific inventory item. Click **Return to Previous Page** to return to the Storefront Manager – Products page.

ADD DIGITAL PRODUCT

Click the **Add Digital Product** button to create a product that is downloaded from the website rather than being physically shipped. You will see the following screen:

Home • Storefront • Storefront Manager - Products • Add/Edit Digital Product

Add/Edit Digital Product

Use this screen to specify the product's characteristics. The values you enter determine how the product will appear in your storefront.

SKU

Title

Short Description

Description

Status

Featured

Pricing

Member Price \$

Available to Non-Members

Non-Member Price \$

Tax Rate

Financial Account

Photo

There is no photo available for this product

Figure 34.22 – Add Digital Product

Digital products share many of the same fields as physical products, including title, descriptions, status, price and photo. They do not have weight or product variations with individual prices, or quantity limits. So these fields do not appear when you are defining a digital product.

Click **Save** to save the new digital product and return to the Products Manager, or **Cancel** to return without saving.

Product Documents

Digital products do not have “inventory”. Instead, they have documents that have separately been uploaded to the website and which are made available to download for a fee. One “product” might include multiple documents. To link these documents to the product, click the **Documents** link for a digital product. You will see a screen similar to the following:

Home • Storefront • Storefront Manager - Products • Product Documents

Product Documents

These are the documents within this category. Click the "Add Document" button to add a new document to the list. Click the "Edit" link to edit an existing document, including moving it to another category and changing its visibility. Click the "Delete" link to remove an existing document. Click "Return to Previous Page" to return to the previous screen.

Title	Format	Size	Maintain
Skiing for Dummies	Other	73672	Remove
Skiing for Dummies Supplement	Other	101508	Remove

Figure 34.23 – Product Documents

This screen shows one or more documents which belong to this digital product. Click the **Add Document** button to add a document. You will see the following screen:

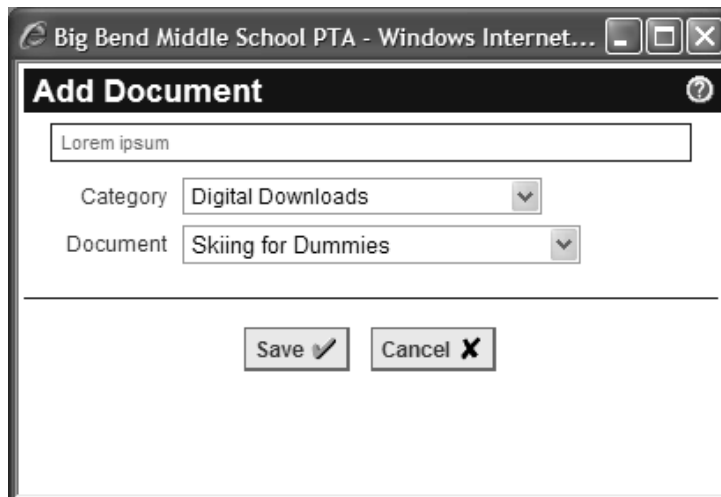


Figure 34.24 – Add Document

Documents must have already been added into your ClubExpress website. Most clubs and associations define a special category in their Documents module to hold digital products but they can come from any category.

Select a category (document folder) and then select a document from that category. Click **Save** to save your addition and return to the Product Documents list, or **Cancel** to return without saving.

If you need to upload the document that you will be adding to this digital product, click the **Upload Document** button. You will see the standard Add/Edit Documents dialog, described on page 316.

You can also click the **Display Sequence** button to control the order in which these documents appear. Note that if users order more than one digital product, the available documents may be intermixed in their download bank.

STOREFRONT MANAGER - ORDERS

The Storefront module has two main admin screens, one for Products and the other for Orders. You can specify which should be displayed on the Storefront Options page and jump from one to the other using a button on each page. The Storefront Manager – Products screen is described on page 488 above. The Storefront Manager – Orders is shown below:

Home • Storefront • Storefront Manager - Orders

Storefront Manager - Orders

Specify filter parameters and click the "Search" button to display matching orders, or select an administrative option from the buttons on the right.

Search

Start Date

Finish Date

Order Status Ready & Partially Filled
 All

Product

User Name

Search Results

Date	Name	Member	Status	Items	Price	Maintain
03/25/2009	Alan Adams	Yes	Test Complete	2	18.64	Details Delete
03/25/2009	Alan Adams	Yes	Filled	3	19.74	ShipTo Details Shipments
03/29/2009	Alan Adams	Yes	Ready To Ship	1	5.12	ShipTo Details Shipments Cancel
03/29/2009	Alan Adams	Yes	Filled	1	5.12	ShipTo Details Shipments
04/07/2009	Alan Adams	Yes	Filled	1	5.12	ShipTo Details Shipments

Figure 34.25 – Storefront Manager – Orders

Specify the appropriate search options and click the **Search** button to view matching orders in the search results grid. Each order is shown with the date it was placed, the user who placed the order and whether this person is a member, the order status, number of items and order value.

In the Maintain column:

- The **ShipTo** link is shown for orders that are pending, ready-to-ship and partially-shipped. It allows you to modify the shipping destination for the order as a whole or just for the remaining items.
- The **Details** link is also shown for pending, ready-to-ship and partially-shipped orders and it allows an admin to modify the order (within limits; see below.) This link is also shown for filled orders but no changes are allowed.
- The **Shipments** link is shown for orders that are ready-to-ship and partially-filled, allowing you to create a shipment and fulfill the order. It is also shown for filled orders to view the shipment history.
- The **Cancel** link is shown for pending, ready-to-ship, and partially-filled orders and it allows you to cancel the order or the unshipped portion of the order. If appropriate, credits will be issued to the user's account.
- The **Delete** link is shown for cancelled orders that were previously pending, and for test orders. It completely deletes the order.

The **Configure** button displays a popup menu of the same configuration options described above.

The **Reports** button displays a list of available Orders reports. Additional filtering options may be available.

The **Download Bank** button shows all digital products that have been ordered; the resulting screen is described below.

There is no “Add Order” button to create an order. Instead, admins can create orders for members and non-members by building a shopping cart then checking out, selecting a member or non-member, then completing payment.

ShipTo

Click the **ShipTo** link to edit the shipping address for an order and whether it is a gift. You will see the following screen:

Big Bend Middle School PTA - Windows Internet Explorer

Add/Edit Shipping Information

View and / or modify order shipping information

Is this a gift? Yes No

Gift Message

Shipping Method

Name

Organization

Address1

Address2

City

State

Zip/Postal Code

Country [Show All Countries](#)

Email Address

Figure 34.26 – Edit Order ShipTo

Modify the shipping address and gift information as necessary and click **Save** to save your changes and return to the Order Details screen. Or click **Cancel** to return without saving.

Order Details

Click the **Details** link to view the details of an order, including its lineitems, sales tax, and shipping and handling. You will see a screen similar to the following:

Home • Storefront • Storefront Manager - Orders • Order Details

Order Details

View / Edit order lines for the selected order.
NOTE: Order editing is not yet implemented

SKU	Title	Status	Price	Quantity	Extended Price	Maintain
xyz		Filled	5.00	<input type="text" value="1"/>	5.00	
LTSR02	Ladies T-Shirt (X-Small, Red)	Filled	2.00	<input type="text" value="1"/>	2.00	
xyz	Baseball Cap (Small)	Filled	7.50	<input type="text" value="1"/>	7.50	
Base					11.00	
Sales Tax					0.74	
Shipping & Handling					8.00	
Total Price					19.74	

Figure 34.27 – Order Details

In the future, this screen will allow the order to be modified, including adding and removing line items, changing quantities and adjusting shipping and handling. For now, this screen is read-only and the **Save** and **Cancel** buttons perform the same action.

Order Shipments - Fulfillment

Click the **Shipments** link to view previous shipments and to fulfill an order. You will be taken to a screen similar to the following:

Home • Storefront • Storefront Manager - Products • Order Fulfillment

Order Fulfillment

Order for: Alan Adams
Shipping To: Alan Adams
Order Date: 3/25/2009
Order Status: Filled

Please note that digital items cannot be "shipped" and therefore are not shown on this page.

Shipments

Date	Shipped	Maintain
3/25/2009	Yes	Edit Packing List Send Email

Figure 34.28 – Order Shipments

The top part of the screen shows open (unshipped) items, including the quantity ordered and the quantity to ship. You can adjust the quantity to ship if necessary (usually because an item is not in stock.) Click the **Ship with Quantities as Shown** button to generate a new shipment.

The bottom part of the screen lists previous shipments. Click the double-down arrow to view the details of what items were included in that shipment.

Click the **Edit** link to modify shipping info. You will see the following screen:

Figure 34.29 – Shipment Status

The selected shipping method is shown but can be changed. You can flag this item as having been shipped, enter a tracking number and the actual shipping cost, and enter an additional shipping fee that will become a miscellaneous charge. Click **Save** to save your changes and return to the Shipments page, or **Cancel** to return without saving.

Clicking the **Packing List** link displays a packing list that you can print to include with the shipment. Clicking the **Send Email** link sends the recipient an email to confirm that the order has been shipped.

PRODUCT DOCUMENTS AND DIGITAL CONTENT

Download Bank Manager

When you click the **Download Bank** button, the following screen is displayed:

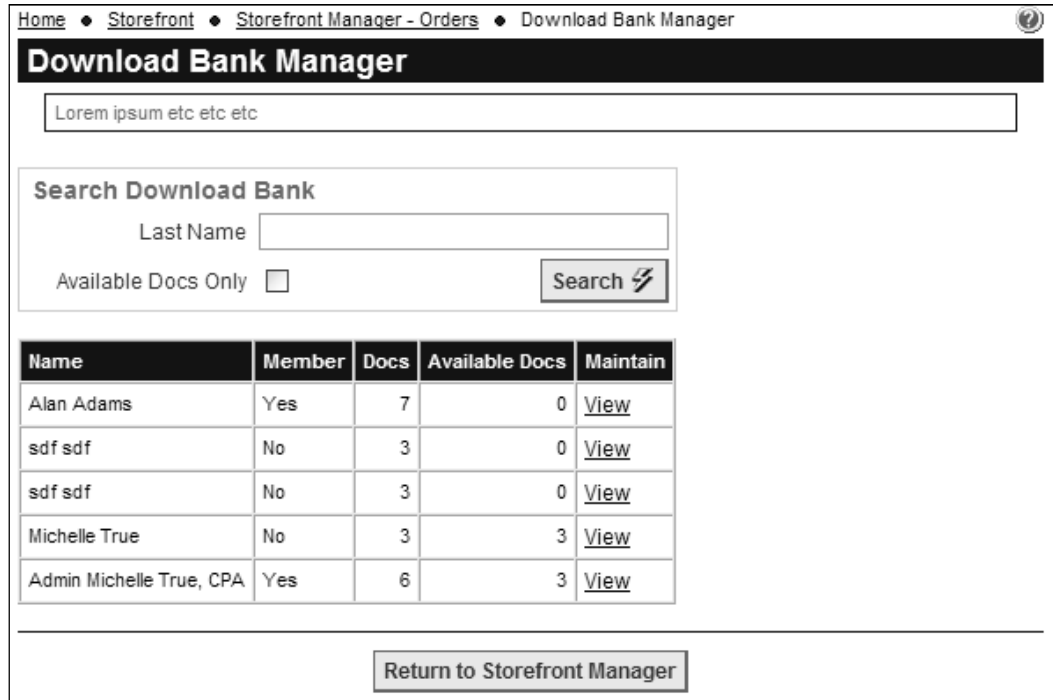


Figure 34.30 – Download Bank Manager

This screen lists each user with open downloads, whether that user is a member or not, the number of documents and the number of available documents in that user’s download bank. Clicking the **View** link displays the Download Bank for that user.

For an administrator, the Download Bank screen includes an **Edit** link, allowing admins to modify selected properties of each document in a user’s download bank. You will see the following screen:

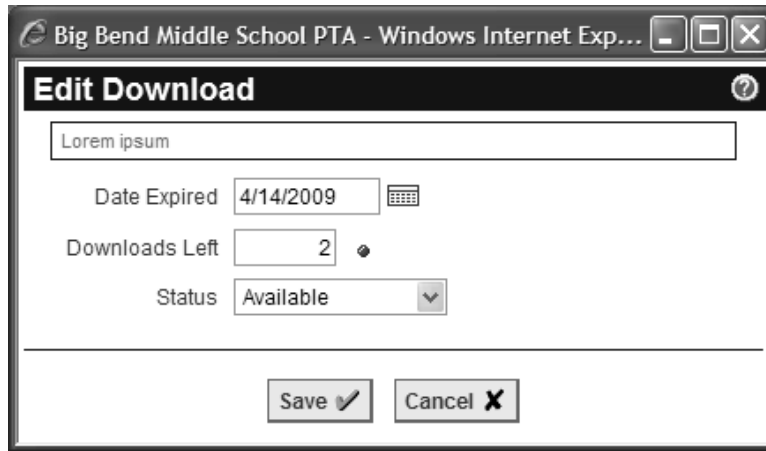


Figure 34.31 – Edit Download

You can change the number of days remaining before the document becomes unavailable. You can also change the status to make the document available if it was not currently, or to hide it so that it's no longer available.

Click **Save** to save your changes and return to the user's download bank, or **Cancel** to return without saving.

Chapter 35 – Modules – Blogs

INTRODUCTION

ClubExpress includes a powerful Blogs (“weB LOG”) module that allows knowledgeable club or association members to publish periodic articles of interest. The system maintains a history and allows readers to navigate through all published articles. RSS is fully supported, allowing readers to subscribe to a blog feed so that they are notified when a new blog entry is published.

The system includes a full set of blog management and authoring tools, using the advanced content editor to allow blogs that include formatting, images, videos, links, etc.

In the ClubExpress model, an administrator or blogs module coordinator creates a blog and then hands it over to a blog author to manage.

Blogs will generally be accessed via a choice on the menu. A typical Blog opening screen is shown below:



Figure 35.1 – Blogs main screen

For non-members, this screen will show all blogs that are flagged as visible to the public. Members-only blogs are not shown unless you are logged in. Click the **Read Blog** button to read the most recent entry for a blog. You will see a screen similar to the following:

The screenshot shows a web browser window with the address bar containing "Home • Blogs • Read Blog". The page title is "Martin Smith: Northwestern Balloon Club's Blog". Below the title is a text box with instructions: "Click 'About this Blog' to view the blogger's picture and the blog description. Click 'More Posts' to see and/or select a recent post to display, or to find a link to all posts for this blog. If comments are allowed for this post, you can add yours by clicking the 'Add Comment' link." Below this are two buttons: "About this Blog" and "More Posts".

The main content area features a section titled "New Supplier..." with a date and time "10/13/2010 3:24 PM". The text of the post reads: "Make sure to visit the Ace Hardware in Mortonville. The owner, Joe Bastion, has been a balloonner for 20+ years! Show him your membership card to get a 10% discount off their already reasonable prices."

Below the post is a section titled "Comments (2)". The first comment is from "Hank Johnson (10/13/2010 3:40 PM)" with the text: "Marty, Thank you for pointing me in the direction of Joe's Ace. Hank". The second comment is from "Michelle (Admin) True (10/13/2010 3:25 PM)" with the text: "Thanks Marty, I can use a few things so I will head over there this weekend!".

At the bottom of the page, there is a "Top of Page" link and a "Return to Previous Page" button.

Figure 35.2 – Reading blog entries

The most recent blog entry is shown with its title and the date-time when it was posted.

Comments

Figure 35.3 – Adding a comment

If the blog allows comments, you will see a comments panel below the blog entry, with the most recent comment at the top. Click the **Add Comment** link to display a panel that prompts for a handle and your comment. Click **Save** to post your comment or **Cancel** to cancel without posting.

About this Blog



Figure 35.4 – About this Blog

Move your mouse over the **About this Blog** button and you will see a popup panel showing the blogger photo and a brief description of the blog. Click the small “Close X” icon to close this display.

More Posts

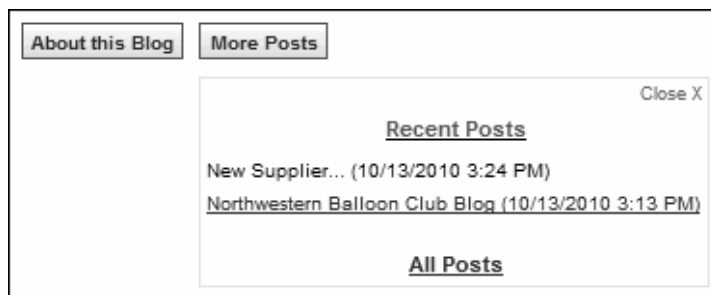


Figure 35.5 – More Posts

Move your mouse over the **More Posts** button and you will see another popup showing links to the most recent 10 posts, together with an **All Posts** link to view

a complete listing of posts. When you click this link, a screen similar to the following is displayed:



Figure 35.6 – Viewing All Posts

Blog posts are listed in descending date-time order with the most recent post at the top. Click a link to view that post.

RSS Support



The blogs module fully supports RSS (Really Simple Syndication). On the main blogs page you will see the standard RSS icon (shown at left.) Clicking this icon will subscribe you to this blog, so that your RSS reader notifies you whenever there is a new post. Your browser may also detect that the current page supports RSS and will display its standard RSS toolbar icon, which can also be clicked to subscribe. Use your RSS reader's management tools to unsubscribe from a blog.

BLOG MANAGEMENT FOR AUTHORS

If you are a blog author, the special panel at the top of each blog page will have some additional options:



Figure 35.7 – Blog Author Tools

When you click the **Maintain Posts** button, you will see a screen similar to the following:



Figure 35.8 – Posts Manager

The grid lists each post in descending date order, showing the post title and date of publication, and whether the post is currently visible. Click the **Add Post** button to create a new post. You will see the following screen:

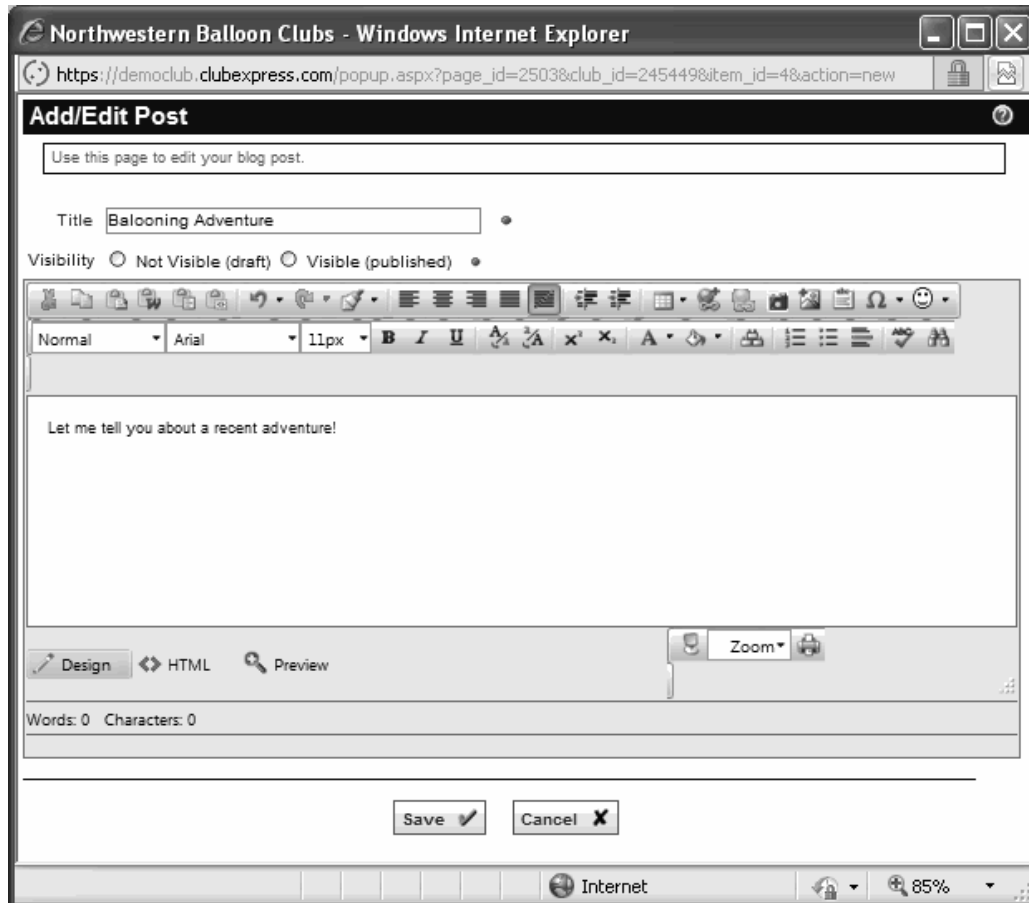


Figure 35.9 – Add Blog Post

Specify the title for your post and whether it should initially be hidden (perhaps because it's a draft) or immediately visible. Below is the standard ClubExpress advanced content editor, with all of its available tools for creating web content, including formatting and layout tools, the link builder and the ability to insert photos and videos. Click **Save** to save your new blog post, or **Cancel** to close the dialog without creating a new post.

Click the **Edit** link to modify an existing blog post. The same dialog will be displayed. Click **Delete** to delete a blog post. You will be asked to confirm this operation. If you select **OK**, the blog post will be completely deleted and cannot be recovered.

Viewing and Editing Comments

Click the **Comments** link to view and edit comments. You will see a screen similar to the following:

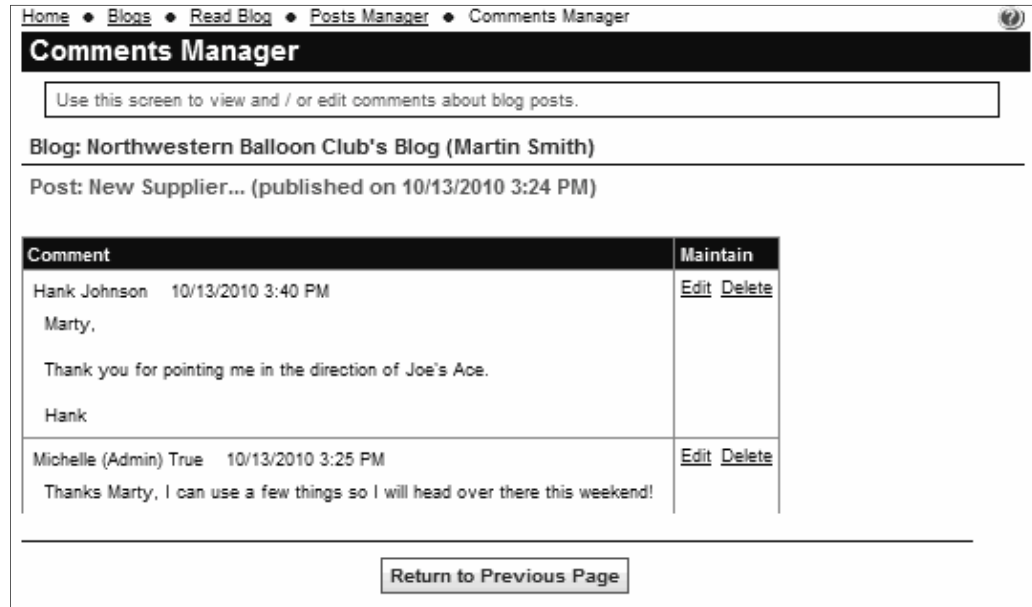


Figure 35.10 – Post Comments

Comments are listed in descending date order. Click the **Edit** link to modify a comment that might be inappropriate. Click the **Delete** link to remove it completely; you will be asked to confirm this action.

Blog Properties

Click the **Edit Blog Properties** button to modify the settings of your blog. You will see the following dialog:

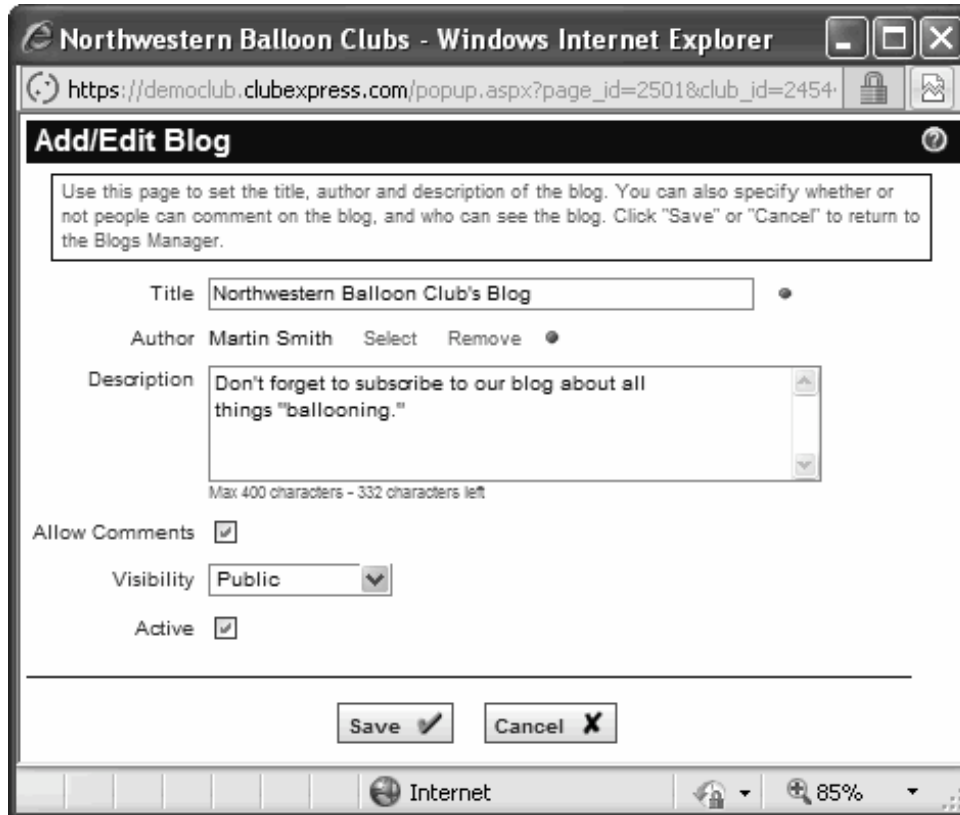


Figure 35.11 – Edit Blog Properties

You can modify the title and description of your blog, whether comments are allowed, who can see the blog and whether it's currently active. Click **Save** to save your changes or **Cancel** to close the dialog without saving.

The **Add Post** button is also available to blog authors on the main blog page.

BLOGS ADMINISTRATION

There are two ways to manage Blogs:

1. Administrators only can click the **Admin** link beside the Blogs module in the Built-In Module Index screen.
2. When viewing the main Blogs panel, coordinators and administrators can click the **Admin** link in the top right corner of the screen.

The following screen is displayed:



Figure 35.12 – Blogs Manager

The grid lists each blog that has been created, showing the title, author, visibility (public or members only) active status and the number of posts. Click the **Add Blog** button to create a new blog. You will see the following screen:

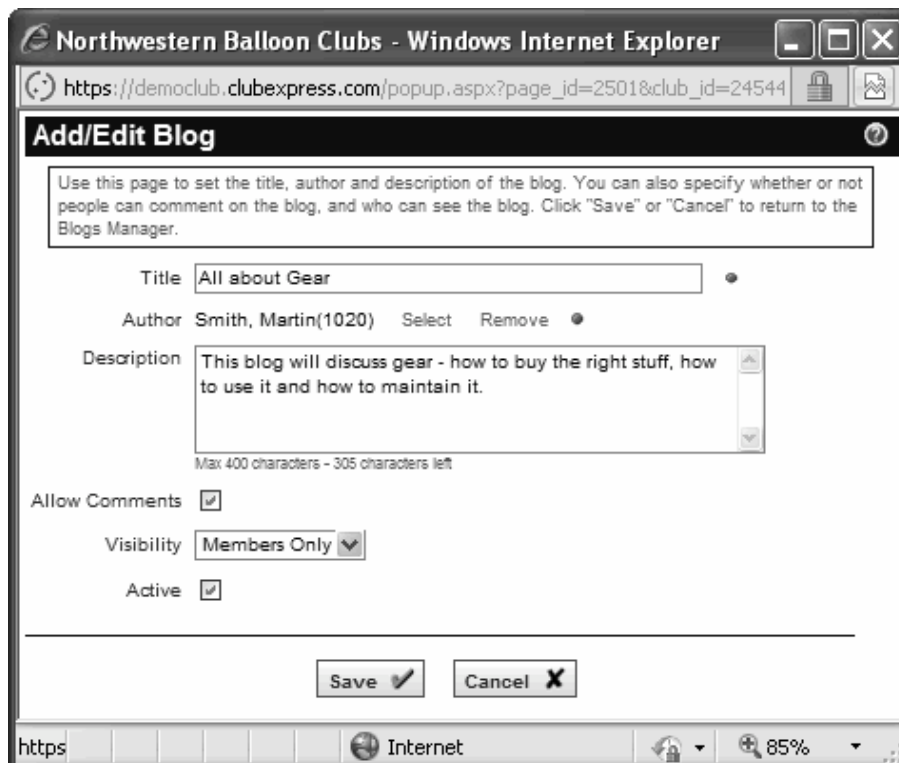


Figure 35.13 – Add Blog

Specify the blog's title, the author who will be responsible for creating blog content, the description, whether comments are allowed, the visibility, and the initial blog status, then click **Save** to create the new blog, or **Cancel** to close the dialog without saving.

Once the new blog has been created, the author will see it in his or her blogs list, even if the initial status is "Inactive". Authors can modify the title, description, visibility, active status and whether comments are allowed.

Click the **Edit** link to modify blog properties. Click the **Delete** link to completely remove a blog and all of its posts and comments; you will be asked to confirm this action but, once deleted, a blog cannot be recovered.

Click the **Posts** link to see the Posts Manager for a blog. This is the same screen described above, with the ability to add a new post, edit or delete an existing post, modify blog properties and manage the comments linked to a specific post.

Appendix A – Bulk Load Specifications

MEMBER DATABASE

The simplest format for importing your club's or association's membership database is a Microsoft Excel spreadsheet, with each member on a separate row and each data element described below in a separate column. We also support Microsoft Access, Paradox, dBase, CSV Text and Fixed Length Text formats. Columns can be in any order.

In the following lists (the maximum length is shown in parentheses after each entry where length might be an issue. Please check your values and shrink excessively long entries down to a size that can be imported.)

The following four fields are required:

- First name (20 chars)
- Last name (35 chars)
 - Suffixes such as “Jr.” and “III” should be in this field.
- Member Type
 - These types must match the ones defined within your ClubExpress website, under “*Control Panel – Member Types*”.
- Date Expired (MM/DD/YYYY format)
 - Must be based on your renewal policies and on the member paid status. We use this value to determine if the imported member will be considered Active or Expired. It must be present for all members and must be a valid date. If you have secondary and tertiary members, be sure that they have the same expiration date as their primary member.
 - Please check that all rows use a valid date format.
 - If you have honorary members, specify a date that's some years into the future (but not too great or the date field will overflow.) We suggest 20 years.

The following additional fields are suggested:

- Member Number
 - If your club or association does not have numbers, you can assign them, or we will assign them based on the date joined. They must be unique for each member, including secondary and tertiary members. Also be sure that the member numbers in the spreadsheet do not match member numbers already in your online database.
- Address1 (50 chars)

- Address2 (50 chars)
- City (20 chars)
- State/Province
- Zip/Postal code
- Country (USA or other)
- Email address (not required, but strongly recommended)
- Phone (24 chars; not required, but strongly recommended)
- Cell phone (24 chars)

The following fields may also be appropriate and are supported:

- Salutation (Dr., Rev., etc.)
- Middle Initial (no period after the letter)
- Nickname (20 chars)
- Gender (use “1” for male and “2” for female)
- Spouse First Name (30 chars)
- Spouse Last Name (30 chars)
- Alt-address1 (50 chars)
- Alt-address2 (50 chars)
- Alt-city (20 chars)
- Alt-state/province
- Alt-zip/postal code
- Alt-country
- Alt-phone
- Work Company (100 chars)
- Work Title (100 chars)
- Work Phone (24 chars)
- Fax (24 chars)
- Toll-free Phone (24 chars)
- Personal/Company Website
- Date Joined (MM/DD/YYYY format)
- Date of Birth (MM/DD/YYYY format)
- Spouse Date of Birth (MM/DD/YYYY format)
- Anniversary Date (MM/DD/YYYY format)
- Printed Newsletter (Yes/No)
- Bio (only up to 250 characters can be imported. Also, be sure to remove embedded carriage returns and paragraph breaks.)
- Member directory visibility – a number from 0 – 7, corresponding to the values shown in the Profile – Membership Directory “Visibility option (where 0 means “Not visible” and 7 means “Everything is shown”) See page 53 for more information.

Additional (but Important!) Notes

For associations where members join as part of their business or professional lives, use the Work... and primary address fields for the business address; the alt-address fields can be used for a home address if you have this information. Put the work phone in the Phone field and not in the Work Phone field.

The import process generates a login name and temporary password, both of which members can change when they first login. If you have login names, by all means provide them, but new temporary passwords will be generated.

Do not combine data elements (for example, city and state) into a single column. Also please check that the phone number and email columns have only one phone number and one email address; extras must be removed. Also remove any extraneous words in these columns. The phone number column can contain extensions in the form “x.123”.

It is important to remove members from the spreadsheet who are already loaded into the system. This will ensure that they are not listed twice!

You should include members whose membership expired in the last 15 months or so. We can import them and send them a welcome email, which might encourage them to rejoin. The system understands when Expired members log in and will take them to the Renewal Wizard where they must renew.

Don't include members who have passed away or moved out of the area or who you know will never rejoin. (Note that we only charge based on your Active membership, so there is no charge for these expired members.

Please double check date fields to be sure that they are defined as actual dates and not as strings. Otherwise, they will not be imported.

Please double check phone number fields and the email address field to be sure that they contain only one phone number or email address respectively. The system cannot import a phone number if it's actually two separate phone numbers in the same column. Phone numbers should also be consistently formatted with parentheses, hyphens, periods, etc.

Please also verify that everything is properly aligned. It can be very frustrating to find one person's email address beside another person's name and contact information.

Finally, once you have sent us the database, please don't add or remove members through the website until after the database has been loaded. This will avoid potential conflicts with members in the online database vs. the one we are loading.

Additional Member Data

If your club or association has additional member data (questions) that are asked of each member, the answers should also be listed in individual columns, with the column header clearly linked to a question defined within ClubExpress, on the **Control Panel – Additional Member Data** screen. This will allow us to import these answers and link them to each member. Otherwise, member answers to additional member data will not be imported.

Be sure that the values in the spreadsheet match the values entered for each question. For example, if you defined a True/False question with values of “Yes;No”, be sure that the spreadsheet column contains the values of “Yes” and “No” only (not “Y” and “N”, or “True” and “False” or “YES” and “NO” – case is important!)

Also, be sure when defining values in the **Control Panel – Additional Member Data** screen that there are no spaces around the semi-colons separating values, especially in Select List and True/False questions. For example, a “Favorite Color” question should be defined as:

Black;Blue;Green;Purple;Yellow

and not as:

Black; Blue; Green; Purple; Yellow

otherwise the values will not match properly and will not be displayed for each member.

Interests and Chapters

If you track interest groups or chapter assignments for members, this information can also be imported.

Use one column for each interest or chapter, with the column heading matching an interest group or chapter defined in your ClubExpress website. If a member has that interest or belongs to that chapter, put “Yes” in that column, otherwise leave the column blank.

Secondary and Tertiary Members

If your club or association supports secondary and/or tertiary memberships (family or business members linked to the primary account), it is best if these are listed as separate rows in the spreadsheet below the primary member.

Recall that secondary and tertiary members are both attached to the primary. Secondary members have a username and password and can login to the website, while Tertiary members cannot login.

- Create a separate column called “Level” then put a 1 for primary and solo members, 2 for secondary, and 3 for tertiary.
- Create another column called “Primary#”. Leave this column blank for primary and solo members but for secondary and tertiary members, enter the member number of that person’s primary member.

This will allow us to import these secondary and tertiary members and link them to the correct primary membership. Otherwise, they will not be imported.

Example for family memberships:

Member Type	Member#	First_Name	Last_Name	Level	Primary#	Address
Family	110	John	Smith	1		123 Winding Lane
Family	111	Mary	Smith	2	110	123 Winding Lane
Family	112	Paul	Smith	3	110	123 Winding Lane

Example for corporate/business memberships:

Member Type	Member#	First_Name	Last_Name	Level	Primary#	Company
Corporate	110	John	Smith	1		ABC Corp.
Corporate	111	Mary	Jones	2	110	ABC Corp.
Corporate	112	Paul	Brown	2	110	ABC Corp.
Corporate	113	Alice	Chen	3	110	ABC Corp.

For family memberships, everyone generally has the same address and often the same last name (though this is not necessary). For corporate or business memberships, everyone generally works for the same company, although the names and sometimes the addresses will be different. We use these guidelines to verify the data as it’s being imported.

We will import this data as best we can, but we cannot guarantee that it will be perfect. If changes are necessary, you can make them once the import is done, by going into the Member Manager and clicking the Primary/Secondary Changes button.

Just to recap: all level 2 and level 3 members must have a primary member number specified. This primary number must be on the spreadsheet or already in the system and must belong to a level 1 member.

NON-MEMBER DATABASE

ClubExpress also includes a non-member database, for other people with whom you want to stay in contact. For example:

- Prospective members
- Meeting attendees
- Donors
- Local government or public safety officials
- Local or national press
- District, state or national officers of your club

You can organize these non-member entries into categories for mailing labels or email blasts. See page 151 for more information.

If you want to send us a non-member database, we are happy to import that as part of the data load. The following fields are supported:

- First name
- Last name
- Title
- Organization
- Address1
- Address2
- City
- State/Province
- Zip/Postal Code
- Country
- Phone
- Fax
- Cell Phone
- Email Address
- Notes
- Date_added
- Category
 - If you don't specify a category, we will use the system category "Interested Persons". If you do specify categories in the list, they should match the categories you have created on the Control Panel – Non-Member Database – Non-Member Categories screen.

Allowable field lengths are the same as for member database.

Note that the above list applies when we do the initial import for you. If you are importing your own mailing lists, as explained on page 155, the available fields and order of fields is different.

Appendix B – Understanding QuickBooks Exports

ClubExpress includes the ability to export four types of financial data from your website in a format that can be imported into QuickBooks. This appendix explains the details of how this works. For an explanation of the screens, see Chapter 13 – Control Panel – Finances.

THE FIVE TYPES OF QUICKBOOKS DATA

User Transactions

When users sign up for membership or renew an existing membership, register for an event, make a donation, purchase merchandise, or incur a miscellaneous charge, a user transaction is generated.

A user transaction represents a commitment to pay in return for some benefit. So from the club’s standpoint, one side of a user transaction is an Accounts Receivable. The other side of the user transaction represents a positive balance in one or more Income accounts. Here’s an example:

Description	Account type	Debit	Credit
Transaction Line Items			
Membership Dues	Income		\$40.00
Club T-shirt	Income		\$12.00
Donation	Income		\$ 5.00
Accounts Receivable	Current Asset	\$57.00	

The membership signup transaction actually represents revenue in three Income accounts (therefore a Credit): membership dues, merchandise sales, and donations. The other side of the transaction is an increase in Accounts Receivable that is a current asset account (therefore, a Debit.)

In QuickBooks, you will likely have separate income accounts for each type of income, allowing you to track income from different sources.

Similarly, ClubExpress allows you to organize different types of income into financial accounts and you can map each financial account into a corresponding QuickBooks account.

Exporting user transactions to QuickBooks generates credit balances in the appropriate income accounts and debit balance in your Accounts Receivable account. Members and non-members are treated as “Customers” in QuickBooks; they are the people who purchase the products and services provided by your club or association. When you import user transactions, QuickBooks also generates open invoices for each customer.

User Credits

When users are credited for an event they were not able to attend or because they volunteered, they are given a User Credit.

User Credits represent a loss of revenue to the club and, more specifically, to an income category. An event credit is a reduction in revenue for that event, while a membership credit is a reduction in membership revenue.

One way of looking at a credit is to consider it as a future obligation or liability incurred by the club—perhaps an Account Payable. But QuickBooks does not allow Accounts Payable to be linked to customers, only to vendors. Instead, QuickBooks handles credits as a reduction in Accounts Receivable, or the money owed by a customer. Here’s an example:

Description	Account type	Debit	Credit
Membership Revenue	Income	\$10.00	
Accounts Receivable	Current Asset		\$10.00

When a membership credit of \$10.00 is issued, the membership income account is reduced by this amount (Debit) and the Accounts Receivable account is reduced by the same amount (Credit to Current Asset.)

In ClubExpress, you must specify a financial account when entering a credit and this financial account will map to an Income account in QuickBooks.

User Credits are used up in a number of ways:

- Applied as part of a payment (described below).
- Refunded to the user. We do not export refunds since the credit is already in QuickBooks. Instead, we assume that the credit is offset by a check cut by the club’s treasurer in QuickBooks to the user.
- Deleted. We cannot export deleted credits since there is nothing to export. Instead, you need to create a transaction in QuickBooks to reverse the deleted credit.
- Waived by the user. We export this as a reversal of the transaction above, crediting the Income account and debiting Accounts Receivable. Effectively, the club recovered the “loss” of the credit.

User Payments

When users make a payment, they are satisfying an open Receivable. A user payment causes a balance to be transferred from one asset account (Accounts Receivable) to another asset account (Bank or Undeposited Funds). Here’s an example:

Description	Account type	Debit	Credit
Accounts Receivable	Current Asset		\$57.00
Bank or Undeposited Funds	Asset	\$57.00	

Accounts Receivable had a balance of \$57.00. This is offset by a credit (reduction) so the balance is now zero. Bank now has a balance of \$57.00 because the payment represents money that was actually received.

In QuickBooks, you will have a separate account for each bank account. Similarly, ClubExpress allows you to map each bank account in the system to a corresponding QuickBooks bank account. QuickBooks also supports the concept of Undeposited Funds, money which has been received but which may not yet physically be in your bank account.

Exporting user payments to QuickBooks generates PAYMENT transactions, credit balances in Accounts Receivable and a debit balance in the appropriate bank account or in Undeposited Funds.

Note that the customer’s open invoices are NOT flagged as paid. There is no way for us to automatically match them so the treasurer will need to handle this task manually. (Note also that the customer/member will have a zero balance if he or she is up-to-date on payments.)

Different types of payments are handled in different ways:

- If the collected funds were received by ClubExpress (using the built-in merchant account or if you are configured for checks to be sent to us) and later remitted to you, you have the choice of showing the funds in a bank account or in Undeposited Funds.
- If the collected funds were received directly by your club (using your own merchant account, cash, a check to the club, or processed through a separate system), the export places the funds in Undeposited Funds. When you actually make the deposit, you can generate a transaction to move these funds from Undeposited Funds to the appropriate bank account(s).
- If the “payment” was recorded as a Comp or Write-Off (Bad Debt), Accounts Receivable is credited and the specified Expense Account for Bad Debts/Comps is debited for this amount. Writing off or comp’ing an expected payment is an expense to the club. For example:

Description	Account type	Debit	Credit
Accounts Receivable	Current Asset		\$57.00
Bad Debts / Comps	Expense	\$57.00	

In ClubExpress, if a payment includes an applied credit, we record a deposit for the gross amount and a separate withdrawal for the credit amount. This is done

because payments may go into different bank accounts than the bank accounts from which credits are withdrawn. Here is an example:

Amount owed: \$57.00
 Credit applied: \$10.00
 Amount actually paid: \$47.00

Description	Account type	Debit	Credit
Accounts Receivable	Current Asset		\$57.00
Bank or Undeposited Funds	Asset	\$57.00	
Bank or Undeposited Funds	Asset		\$10.00
Accounts Receivable	Current Asset	\$10.00	

Note that the payment type and a reference number will be shown where appropriate. In most cases, there is only one payment type per transaction. For checks, the record will say “Check” and will include the check number. For credit cards, the record will say “Credit Card” and include the last 4 digits. If the payment includes multiple payment methods (for example, credit card and check, or check and discount or credit) the payment type is “Multiple Payment Methods”; there is no way to include the details of each payment method.

Club Transactions

When we charge a fee, the funds are deducted directly from your bank account using an ACH. Similarly, when we issue a credit, the funds are deposited directly into your bank account using an ACH.

Club Transactions are handled using a Debit to an Expense account (the expense increases) offset by a Credit to the primary bank account (the amount on deposit is lowered.) Here’s an example:

Description	Account type	Debit	Credit
Website Hosting	Expense	\$22.40	
Bank	Asset		\$22.40

ClubExpress allows you to specify your QuickBooks account name for each category of expense, including test transactions, setup fees, monthly hosting fees, miscellaneous charges and credits, postage, etc.

Members and Non-Members

Selecting this option exports the member and non-member databases. When this information is imported into QuickBooks, it becomes “customer” data. QuickBooks will attempt to match incoming records against the data already in the system; if a match is made, the other data (address, etc.) will be updated. If no match is made, a new customer record is added.

CONFIGURATION NOTES

QuickBooks Account Names

QuickBooks account names are updated in three places within ClubExpress. Be sure that all three are correctly filled out:

- Control Panel – Bank Accounts
- Control Panel – Financial Accounts (both grids)
- Control Panel – Finance Options

Transaction, payment and credit data is exported using IIF files – the Intuit Interchange Format. This is a tab-delimited file format where account names are spelled out. QuickBooks looks for an account in its chart of accounts with the exact spelling shown in the IIF file.

When you are entering QuickBooks account names into ClubExpress, be sure that the spelling is exact. If it's not, QuickBooks will create a new account with the spelling from the IIF file and you will have to manually move each transaction to the correct account.

When specifying account names in ClubExpress, do not include an account number. For example, if the account is shown as:

4110 • Membership Dues

in the QuickBooks Chart of Accounts, specify "Membership Dues" as the QuickBooks account name in ClubExpress.

If your account is a sub-account, specify the path to the sub-account with a colon delimiter. For example, if the account is shown as:

4000 • Income
4050 • Donations

in the QuickBooks Chart of Accounts, specify "Income:Donations" as the QuickBooks account name in ClubExpress. Note that there are no spaces around the colon.

Note also that the ClubExpress account name field is limited to 50 characters. If your QuickBooks account names are longer than this, including sub-accounts, they may need to be shortened to fit.

QuickBooks Customer Names

QuickBooks allows you to store and match customer names in one of two formats:

- FirstName <Middle Initial>. LastName
- LastName, FirstName <Middle Initial>.

Be sure to select the same format in both ClubExpress and QuickBooks, to ensure that imported transactions and payments are linked to the correct customer records.

Note that QuickBooks does not provide an *update* function for customer data. When you run the Member and Non-Member export, and then import the customer file into QuickBooks, the program will match as described above. For each matching record, the data in the imported customer file will completely replace any customer data previously stored in the matched records in QuickBooks. For this reason, be sure to do your updates in your ClubExpress website, otherwise they may be lost when you export from ClubExpress and import into QuickBooks.

QuickBooks Classes

ClubExpress will export class information if you are using QuickBooks classes. Classes are used to categorize income and expenses in different ways. To enable them, follow these steps in QuickBooks:

1. Edit – Preferences
2. Select Accounting in the left-side list
3. Select the Company Preferences tab
4. Check the “Enable class tracking” box
5. Click OK

In ClubExpress, check “Enable class tracking” on the Control Panel – Finance Options page. When you do this, the Financial Account screens in ClubExpress also allow you to specify a class for each financial account.

Classes are exported only for Income and Expense accounts.

Even though QuickBooks allows you to specify a class for Accounts Receivable (Invoices and Credit Memos), ClubExpress will not export a class value for Accounts Receivable. The reason is that a user transaction or user credit might affect multiple Income accounts, each of which could be in different classes. So we cannot definitively assign an Accounts Receivable to a single class. But if you want classes assigned to the Accounts Receivable lines, you can always add them manually afterwards.

User Payments Without A Customer

QuickBooks requires that a customer record be defined before a payment can be recorded for that customer. But when you are first starting to use the QuickBooks export feature, you may export user payments that do not have a corresponding user transaction record.

In this case, QuickBooks will add the username to its Other Names list instead of the Customer list. The Other Names list can be found on the Lists menu. Other Names can be re-categorized as Customers by editing the name and clicking the Change Type... button.

Date Ranges

The date range is queried based on “Date Entered”, a hidden field in the system which tracks when a transaction, payment, credit or fee was actually recorded. This may be different from the Payment Date recorded by the user; ClubExpress allows you to enter any date when you are recording an item (for example, to record that a check was received earlier than when the database was updated.)

In the export, the Payment Date will be shown in the Memo field if it’s different than the Date Entered.

Sales Tax

If your QuickBooks company file is configured to enable sales tax, be sure to set the matching configuration flag in the ClubExpress Control Panel – Finance Options screen.

If this flag is set, ClubExpress will send an AUTOSTAX line with each user transaction, even the ones where sales tax is not applied (membership signup and renewal, event registration, donation, etc.) Where sales tax is applied (storefront transactions), the AUTOSTAX line will contain the sales tax amount.

If this flag is not set, sales tax is exported as a transaction line item, with the actual sales tax account specified in the split of funds.

Item Quantities and Cost Per Item

ClubExpress does not currently export QuickBooks items (for example, storefront products.) The reason is that QuickBooks does not provide a way to update just selected fields in an item record. If we provided such an export and you then imported it into QuickBooks, you would find that much of the data that QuickBooks stores for each item would be lost because it has no analog in ClubExpress.

Appendix C – System Emails

ClubExpress includes a number of emails that are sent out automatically by the system when specific events take place. All of the following emails can be customized for each club or association. Contact us if you want to do so and we will send you a ZIP file containing the following emails.

Filename	Description
New Memberships	
Bulk_load.txt	This is the welcome email to members, sent out when your club goes live. It contains the temporary username and password, as well as general information about how to login and update the member's Profile.
New_member_self.txt	Sent to new members who sign themselves up using the new member wizard. This email is sent when the member navigates from the Summary screen to the Payment screen, before payment is made. Membership status is "Pending".
New_member_admin.txt	Sent to new members who are signed up by an administrator (perhaps as a result of a completed membership application received in the mail or at an event.) As above, this email is sent before payment is recorded. It includes a temporary username and password so that the member can login (after which they will change it.) Membership status is "Pending".
New_member_notification.txt	This is an optional email that can be sent to the designated member coordinator whenever members sign themselves up.
New_prospective_member_self.txt	This email is slightly different from the corresponding one above. It is sent when members sign themselves up and when the new membership requires approval by the board of directors. Status is "Prospective".
New_prospective_member_admin.txt	This email is slightly different from the corresponding one above. It is sent when a member is added by an administrator but when the new membership still requires approval by the board of directors. It includes a temporary username and password but prospective members cannot login until their membership has been approved. Status is "Prospective"

Approve_prospective_member.txt	When the “board” approves a Prospective member, this email is sent to tell the member to login and complete payment. Membership status changes from “Prospective” to “Pending”.
Decline_prospective_member.txt	When the “board” declines a Prospective member, this email is sent. Membership status changes from “Prospective” to “Dropped”.
Pending_warning.txt	This optional email can be sent to Pending members who have not yet paid. It reminds them that they need to login and complete payment in order to activate their membership.
Drop_notice.txt	This email is sent when you optionally choose to drop Pending members who have not yet paid. Membership status changes from “Pending” to “Dropped”.
Renewals	
Renewal_notice_1.txt	This is the first renewal notice sent when it's time for a member to renew.
Renewal_notice_2.txt	This is the second renewal notice sent when it's time for a member to renew.
Renewal_notice_3.txt	This is the third renewal notice sent when it's time for a member to renew. This notice can optionally be sent after the member's normal expiration date but before the system actually expires the membership.
Renewal_self.txt	This email is sent when members renew their memberships but before they pay. It confirms that the transaction is complete (the member is “renewed”) but not that payment has been received.
Renewal_admin.txt	This email is sent when an admin processes the renewal for a member, but, again, before payment is recorded.
Expiration_notice.txt	If members don't renew, the system will expire them automatically, either on their actual expiration date, or some number of days later (the expiration “lag” period.) This notice is sent out when expiration happens. Expired members can still login but they will be taken to first page of the renewal wizard where they have to renew.

Event Registrations	
Event_confirmation.txt	This email is sent to a member or non-member once the event registration is complete but before payment is received. It confirms the registration, but also reminds users that they still need to pay.
Event_confirmation_no_fee.txt	Similar to the one above but it's sent when there was no fee for the registration.
Event_registration_notification.txt	This optional email is sent to the specified event contact to inform him or her that a registration was received.
Donations	
Donation_confirmation.txt	Sent to a member or non-member to confirm that a donation was received, but before payment was recorded.
Storefront	
Order_confirmation.txt	Sent to a member or non-member to confirm that a storefront order was received, but before payment was recorded.
Order_notification.txt	This optional email is sent to the specified storefront coordinator to inform him or her that an order was received.
Shipment_confirmation.txt	Sent to the member or non-member to confirm that all or part of an order has been shipped.
Payments	
Payment_confirmation.txt	Sent to a member to confirm that payment was received. One payment might include multiple transactions (membership, event registration, donation, storefront purchase, etc. Members can login to view complete transaction and payment histories.
Payment_confirmation_non_member.txt	Sent to a non-member to confirm that payment was received for an event registration, donation or storefront purchase.
Miscellaneous_charge_confirmation.txt	Sent to members when a miscellaneous charge has been entered into their account, asking them to login and complete payment.
Auto_payment_confirmation.txt	Sent to members to confirm an automatic membership renewal charge against a saved credit card. This option is only available if your club is using its own merchant account.

Auto_payment_failure.txt	Sent to members when there is a problem applying a charge to a saved credit card (for example, the card has expired.) It tells them to login and fix the problem.
Other	
Reset_password.txt	Sent when the member selects “Forgot My Username/Password” from the login screen, or when an admin clicks “Reset Password” from the member’s Profile screen. Includes the member’s username and a new temporary password; both can be changed once the member logs in.

The following emails are also sent by the system but cannot be customized for each club or association.

Filename	Description
A “Gentle Reminder”	When a club or association is using the built-in merchant account, this email is sent to members and non-members five days after a credit card payment was recorded. It reminds the recipient about the transaction from “ClubExpress” that will soon appear on their credit card statement.
List of Renewal Notices	Renewal notices are triggered by a process that we run in the office every few days. This email goes to the club’s designated membership coordinator, listing the members who received a renewal notice.

Appendix D – Settings for your own Merchant Account

ClubExpress allows clubs and associations to have their own merchant account. Instead of the funds flowing through us, and “ClubExpress” appearing on user’s monthly statements, the funds flow directly to you and your club or association name will appear on monthly statements.

When you set up your own merchant account, you are generally doing business with two companies: the “Merchant Processor” and the “Payment Gateway”. We don’t care which merchant processor you use but the payment gateway must be “Authorize.Net”, one of the largest and most respected payment gateways in the industry.

If you need help setting up your own merchant account, contact us; we have a partnership with our own merchant processor that offers similar transaction fees to using the built-in account.

Authorize.Net will provide you with an account on their secure website. When you login to this account you can use a virtual terminal, review transactions, run reports and perform other tasks associated with your account.

CONFIGURING YOUR MERCHANT ACCOUNT IN CLUBEXPRESS

For us to configure your own merchant account in ClubExpress, we need two pieces of information from you:

- API Login
- Transaction Key

On the Authorize.Net website, once you login, these can be found on the **Settings** page, under **Security Settings – API Login and Transaction Key**. Once you generate new values, send them to us and we’ll configure them in the system for you. This process takes a few minutes and then you can run a small test transaction (perhaps a misc. charge) to verify that everything is working.

TRANSACTION FORMAT SETTINGS

ClubExpress submits transactions through the Authorize.Net API in a specific format. You need to configure the API to accept this format.

On the Authorize.Net website, go to the **Settings** page. Under **Transaction Format Settings**, click **Payment Form** then click **Form Fields**. Be sure that all of the checkboxes in the “Required” column are blank (unchecked). Also be sure that the **Security Code** checkbox at the bottom of the page is not checked. Then click the **Submit** button.

ClubExpress ensures that transactions are correctly formatted, with all required information, before submitting them to Authorize.Net. So you don't need Authorize.Net to enforce these required fields.

CCV SETTINGS

Card Code Verification (CCV) is the three or four digit code on the back or front of your credit card. For your (and our!) protection, ClubExpress requires users to enter the correct code in order to process a transaction.

On the **Settings** page, in the **Security Settings** section, select **Card Code Verification**. This page allows you to configure how the gateway should accept or reject transactions when the card code does not match.

We recommend checking the “Does NOT Match (N)” box only. Click **Submit** to save your changes.

AVS SETTINGS

The Address Verification Service checks the address entered by the user against the address registered with the credit card to ensure they are the same. Specifically, the system verifies the street *number* component only of the main address field (not the street name!) and the zip code.

On the **Settings** page, in the **Security Settings** section, select **Address Verification Service**. This page allows you to configure how the gateway should accept or reject transactions when the address does not match.

In the **General AVS Responses** section, we recommend checking the following options:

- B – Transaction was submitted without a billing address.
- E – AVS data provided is invalid or AVS is not allowed for the card type that was used.
- R – The AVS system was unavailable at the time of processing.

We recommend leaving the G, U and S settings unchecked.

In the **Address and ZIP Code Responses** section, we recommend checking the N option only. A transaction will be rejected if none of the address components match.

We recommend leaving the A, Z, W and Y options unchecked; if any address component matches, the transaction is accepted.

Click **Submit** to save your changes.

WHICH CREDIT CARDS ARE ENABLED

Be sure to tell us whether you enabled or disabled Discover Card and/or American Express (Amex in particular requires a separate contract with your merchant processor.) If Discover and Amex are not enabled, we need to hide them on your ClubExpress website.

SEARCHING IN AUTHORIZE.NET

If you need to search for transactions, there are two lists maintained with Authorize.Net.

Unsettled transactions are those that have occurred within the past few hours (sometimes as long as 24 hours.) Settlement usually occurs around 5:30 PM Central time; transactions which take place before then can be found on the Unsettled Transactions list.

Once transactions have settled, they can be found by clicking the “Search by Batch” option. To search by card number, enter the last four digits only. To search by name, put the full cardholder’s name in the Last Name field, since this is how we submit the name to Authorize.Net.